

# Visitor Profile

## Destination Port Stephens

Year-end June 2022

Financial Year Results



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## Key Performance Indicators

The data for this report is sourced from the National Visitor Survey produced by Tourism Research Australia. The data for the 2021-22 financial year<sup>1</sup> demonstrates the number of *overnight trips in regional areas in NSW* decreased 22% from the 2021 financial year and 27% from 2019. Port Stephens shows a similar trend with a 28% decrease on the previous year for overnight visitors, and a 19% decrease for all visitors. As shown on page 3 this result was primarily caused by a poor performing quarter in Jul- Sep 2021 when NSW was in lockdown.

International visitors resumed travelling to Australia in small numbers in March 2022, with restricted reporting available from TRA on international market segments.

Year end June '000	2017	2018	2019	2020	2021	2022	5 year average
<b>Domestic overnight</b>	677	741	810	713	858	615	747
<b>% change</b>	9%	9%	9%	-12%	20%	-28%	7%
<b>Domestic nights</b>	2,174	2,217	2,512	2,217	2,514	2,100	2,312
<b>% change</b>	4%	2%	13%	-12%	13%	-16%	4%
<b>av night stay</b>	3.2	3.0	3.1	3.1	3.0	3.4	3.1
<b>Domestic day</b>	633	818	917	952	860	766	863
<b>% change</b>	-17%	29%	12%	4%	-10%	-11%	4%
<b>International overnight</b>	37	49	43	26	0	4	24
<b>% change</b>	42%	32%	-12%	-40%	-100%	^	-15%
<b>International Nights</b>	171	160	175	166	0	27	106
<b>Year end June Total Visitors</b>	1,347	1,608	1,770	1,691	1,718	1,385	1,634
<b>% change</b>	-4%	19%	10%	-4%	2%	-19%	4%
<b>Year end June Total Nights</b>	2,345	2,377	2,687	2,383	2,514	2,127	2,418
<b>% change</b>	8%	1%	13%	-11%	5%	-15%	3%

Source: National Visitor Survey & International Visitor Survey, Tourism Research Australia

## Visitor Expenditure

Total visitor expenditure to Port Stephens LGA was \$515 million<sup>2</sup> in 2021-22, a decrease of 20% on the previous year. This is in line with Hunter region (-19%) yet slightly higher than regional NSW (-13%).

<sup>1</sup> <https://www.tra.gov.au/data-and-research/reports/national-visitor-survey-results/national-visitor-survey-results>

<sup>2</sup> Data provided to DPS by DNSW.

## Domestic Source Markets

Domestic source markets remain in a similar pattern to previous years, with day visitors from the Hunter providing the majority of day visitors, while Sydney is still the main overnight visitor market.

When 2021/22 is compared to the five year average, there was a slight variation in the overnight market with slightly less visitors coming from Sydney (-4%) than in the previous five years, and more from the Hunter and Central Coast. The day visitor market showed no significant change in source markets.

### Domestic Source Markets (Year end June 2022)

State	Region	Overnight 2022	Overnight 5 year av	Day 2022	Day 5 year
<b>NSW</b>		91%	90%	100%	100%
	Sydney	56%	60%	16%	18%
	Hunter	14%	13%	76%	77%
	Central Coast	10%	6%	2%	1%
	North Coast	3%	4%	4%	4%
	Other NSW	8%	8%	0%	0%
<b>QLD</b>		3%	4%		
	Brisbane	3%	2%		
	Gold Coast	1%	1%		
	Sunshine Coast	0%	<1%		
	Other QLD	1%	0%		
<b>VIC</b>		2%	3%		
	Melbourne	2%	3%		
	Other VIC	0%	0%		
<b>Other States</b>		2%	3%		
	SA (ADL)	1%	1%		
	ACT (CBR)	2%	2%		
	TAS (Hobart)	<1%	<1%		
	WA (Perth)	<1%	<1%		
	NT	<1%	<1%		

Source: National Visitor Survey, Tourism Research Australia

## Domestic Overnight Visitors

### Travel Party

The travel party of domestic overnight visitors has not changed significantly over the past 5 years, with slight variations of 1-3% seen in some segments. Friends/relatives travelling in a group with or without children remain the largest segment at 30% , along with adult couples at 29%.

	2018	2019	2020	2021	2022	average	2022 +/- average
Travelling alone	16%	10%	21%	<b>15%</b>	<b>18%</b>	16%	2%
Adult couple	37%	30%	31%	<b>31%</b>	<b>29%</b>	32%	-3%
Family group - parents and children	18%	26%	20%	<b>22%</b>	<b>22%</b>	22%	
Friend or relative group	27%	32%	25%	<b>32%</b>	<b>30%</b>	29%	1%

## Reason to travel to the destination

There has been return from holiday visitors, with 6% less holiday visitors in 2022, returning VFR and holiday markets to pre-Covid levels. As shown, the VFR market has returned to its 5-year average of 27% and is close to its 10 year average of 25%.

	2018	2019	2020	2021	2022	5 year average	2022 +/- over average
Holiday	66%	66%	54%	73%	67%	65%	2%
VFR	27%	29%	33%	20%	27%	27%	0%
Business	6%	2%	10%	6%	4%	5%	-1%
Other	1%	1%	2%	1%	1%	1%	0%
In transit	0%	2%	2%	0%	0%	1%	-1%

## Age and gender

The age of domestic overnight visitors has not changed significantly over the past 5 years, with only slight variations of 1-3% seen in age segments. A slight increase in 60-64 age group was noted in 2022.

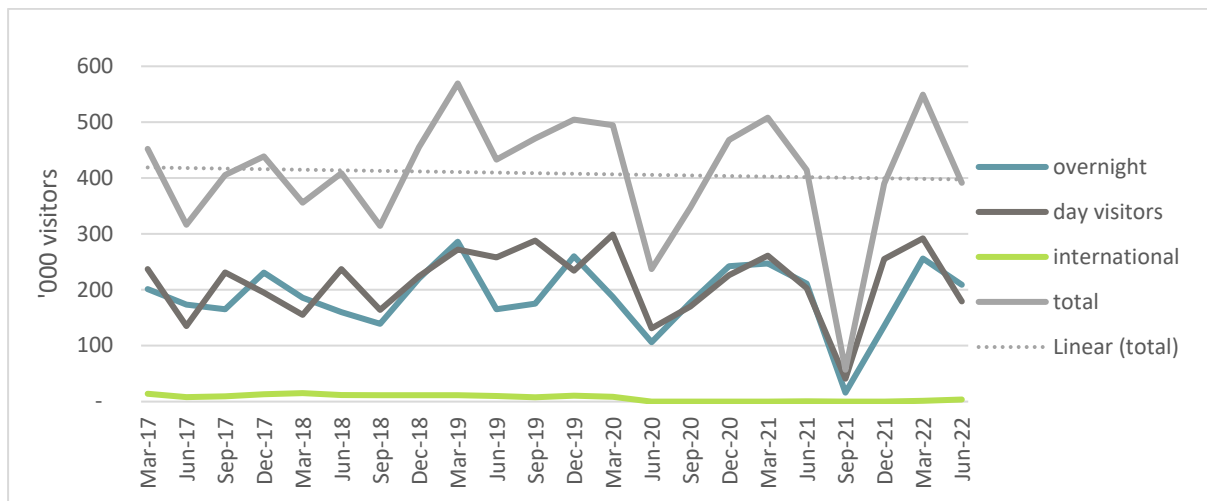
There was also no change to the gender split of visitors at a steady 50% male and 50% female.

	2018	2019	2020	2021	2022	average	2022 +/- over average
15-19	3%	3%	6%	2%	7%	4%	2%
20-24	3%	7%	8%	6%	10%	7%	3%
25-29	9%	5%	9%	11%	7%	8%	-1%
30-34	10%	14%	9%	7%	7%	10%	-3%
35-39	6%	11%	10%	8%	7%	9%	-1%
40-44	13%	6%	7%	12%	4%	8%	-4%
45-49	7%	7%	11%	8%	7%	8%	-1%
50-54	9%	10%	8%	9%	8%	9%	-1%
55-59	9%	7%	7%	9%	7%	8%	-1%
60-64	9%	6%	9%	6%	13%	9%	4%
65-69	9%	13%	7%	11%	12%	10%	1%
70-74	6%	6%	4%	7%	7%	6%	1%
75-79	5%	3%	3%	3%	4%	4%	1%
80+	2%	1%	2%	1%	1%	1%	0%
total	100%	100%	100%	100%	100%	100%	

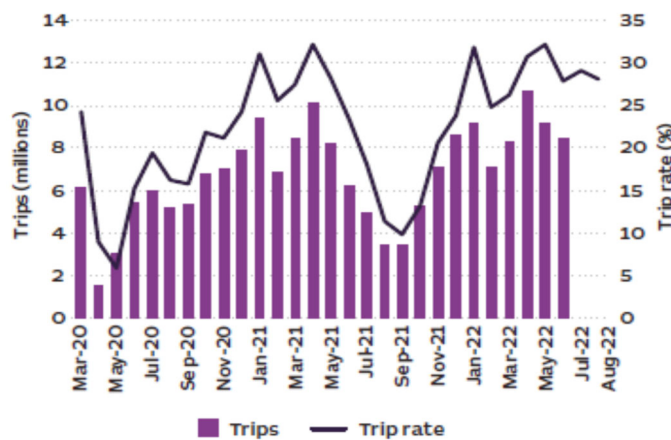
## Quarterly analysis

When comparing the quarterly analysis on the previous year, the impacts of Covid-19 travel restrictions on both overnight and day visitors can be observed. In the Sept 2021 quarter, regional travel restrictions in NSW were in place, resulting in a major downturn in both day and overnight visitors. It wasn't until the March 2022 quarter that visitors returned to regional areas. This is further seen in the charts below demonstrating Year-to-date trends and the corresponding TRA analysis for overnight visitors around Australia.

	July-Sept Quarter				Oct-Dec Quarter				Jan-March Quarter				April-June Quarter			
	2019	2020	2021	%	2019	2020	2021	%	2020	2021	2022	%	2020	2021	2022	%
Domestic Overnight	175	177	16	-91%	260	242	135	-44%	187	247	256	4%	106	211	209	-1%
Domestic Nights	400	476	26	-95%	861	728	427	-41%	720	802	1077	34%	588	593	570	-4%
Day Trips	288	170	41	-76%	234	226	255	13%	299	261	292	12%	131	203	179	-12%



**Figure 1. Domestic overnight trips and trip rates, March 2020 to August 2022<sup>1</sup>**



Source: TRA: National-Visitor-Survey-Results June 2022

TRA data for the SA2 area of Port Stephens includes the seven sub-regions of Anna Bay, Lemon Tree Passage - Tanilba Bay, Nelson Bay Peninsula, Raymond Terrace, Seaham – Woodville, Williamtown - Medowie – Karuah, Stockton - Fullerton Cove.

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This report has been compiled by researchers from Destination Research. The visitation statistics contained in this report are based on the sample data collected by TRA and therefore provide an indication of visitor trends rather than actual performance measures. The information presented in this report is accurate at the time of printing. Whilst all care is taken to ensure its accuracy, no liability is accepted for loss or damage as a result of its content. Findings and recommendations are based on the data of the current study; further research may be required in some areas to validate the findings of this study. Enquiries should be directed to the Research Manager, [destination.research@yahoo.com](mailto:destination.research@yahoo.com)