

ALBURY WODONGA

VISITOR
ECONOMY
TRENDS 2015



see both sides

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1. Purpose of report

Albury Wodonga's social, cultural and economic vigour is substantially enhanced by the local tourism industry. The tourism marketplace is increasingly competitive as regional destinations endeavour to capture a greater market share.

This report presents key statistics and information about the number and type of visitors to Albury Wodonga in the 2015 calendar year. More specifically, data is provided on domestic day visitors, domestic overnight visitors and international visitors to Albury Wodonga. The report also benchmarks Albury Wodonga's performance in comparison to other regional destinations, and measures the social media engagement and on-site visitor information enquiries recorded through both councils.

Data is provided by Tourism Research Australia (TRA), a branch within the Tourism Division of Austrade. TRA provides statistics, research and analysis to support industry development, policy development and marketing for the Australian tourism industry. Data has also been sourced from REPLAN, an independent agency that provides economic and employment industry data.

This publication will be used to provide information to businesses, investors and the community to outline the current tourism capacity in Albury Wodonga.



2015 SUMMARY

Overnight visitation
increased by
24%
in 2015, representative of
a combined 1.72 million
nights stayed.



48,434 unique visitors
engaged online with
visitALBURYWODONGA -
website and social media.



\$613 million

into the Albury Wodonga economy
from tourism.

898,000



day visitors visited
Albury Wodonga
during 2015.



31,087

Official Albury Wodonga
Visitor Guides distributed.



Serviced

36,789

visitor groups and individuals
at the Albury and Wodonga
Visitor Information Centres.

The average stay of
international visitors
increased by



11 nights

per trip, representative of a
combined 257,869 nights stayed in
2015.

3. Albury Wodonga location

Albury Wodonga is strategically located on one of Australia's main transport and communication corridors between Sydney and Melbourne and acts as a gateway to Victoria's High Country and the Murray region, two of Australia's most diverse regions. Combined, the two cities form Australia's 20th largest city with a population of 90,281 people. Albury Wodonga services a broader regional catchment of approximately 180,000 people.

The cities are surrounded by award-winning wineries, historic townships, expansive lakes, Alpine areas, gourmet food and significant cultural sites, making it the perfect visitor destination.



4. Albury Wodonga destination brand

see both sides

Albury Wodonga is a place of surprising contrasts. It's where the great outdoors meets urban culture. It features proud heritage and fresh sophistication, side by side. Defined for so long by its duality – a meeting place of two cities and two states across the iconic Murray River – Albury Wodonga embraces its remarkably diverse offering to deliver something truly unique in the region.

The Great Outdoors



The Great Indoors



Connected Cities



Sophisticated Country



5. Major tourism events in 2015

- **Commercial Club Albury Gold Cup**
16500 attendees
- **Spirit of Anzac Centenary Experience**
15000 attendees
- **Border RV Show**
11500 attendees
- **Ovens and Murray Football Netball Grand Final**
10100 attendees
- **Albury Show**
8800 attendees
- **AFL NAB Challenge**
8400 attendees
- **Camping, Caravan, 4WD Club Show**
8000 attendees
- **Chryslers on the Murray**
7000 attendees
- **NRL Manly vs Canberra**
6400 attendees
- **North East Food and Wine Festival**
6000 attendees
- **Telstra Business Centre Wodonga Gold Cup**
5431 attendees
- **Ulysses AGM**
3200 attendees
- **Australian Country Junior Basketball Cup**
1800 attendees

6. Economic benefit of tourism

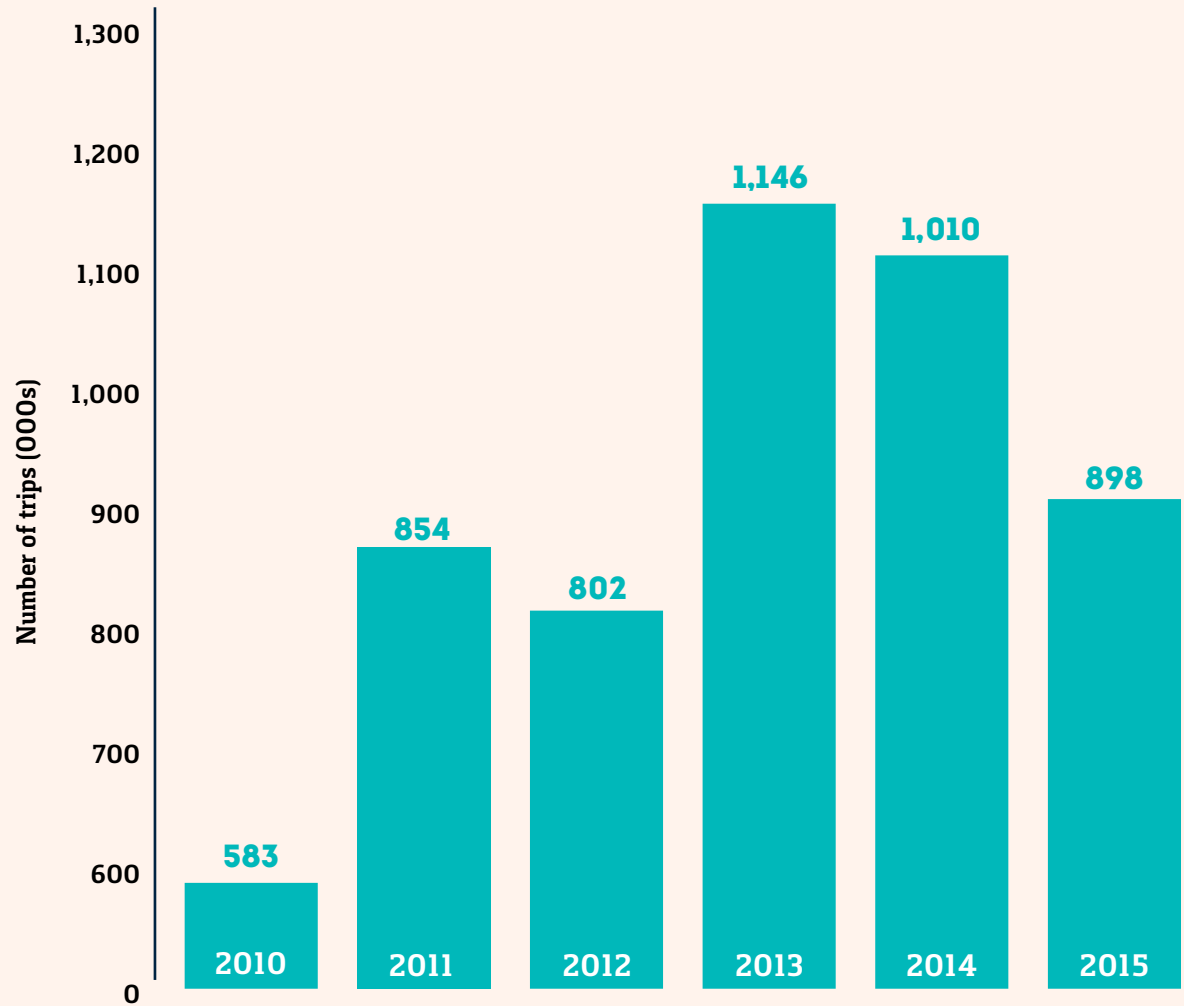
	VISITOR NUMBERS	AVERAGE DAILY EXPENDITURE	VISITOR IMPACT
Domestic day visitors	898,000	\$158	\$141,884,000
Domestic overnight visitor nights	1,465,000	\$120	\$175,800,000
International visitor nights	257,869	\$57	\$14,698,533
Total direct impact			\$332,382,533
Total indirect impact			\$281,071,000
Total tourism impact			\$613,453,533

The economic impact of tourism was determined using visitor data from Tourism Research Australia and analysed through REPLAN economic modelling software.

7. Results

Domestic day trip visitors - all purposes 2015

IN 2015, ALBURY WODONGA RECORDED 898,000 DOMESTIC DAY VISITOR TRIPS.



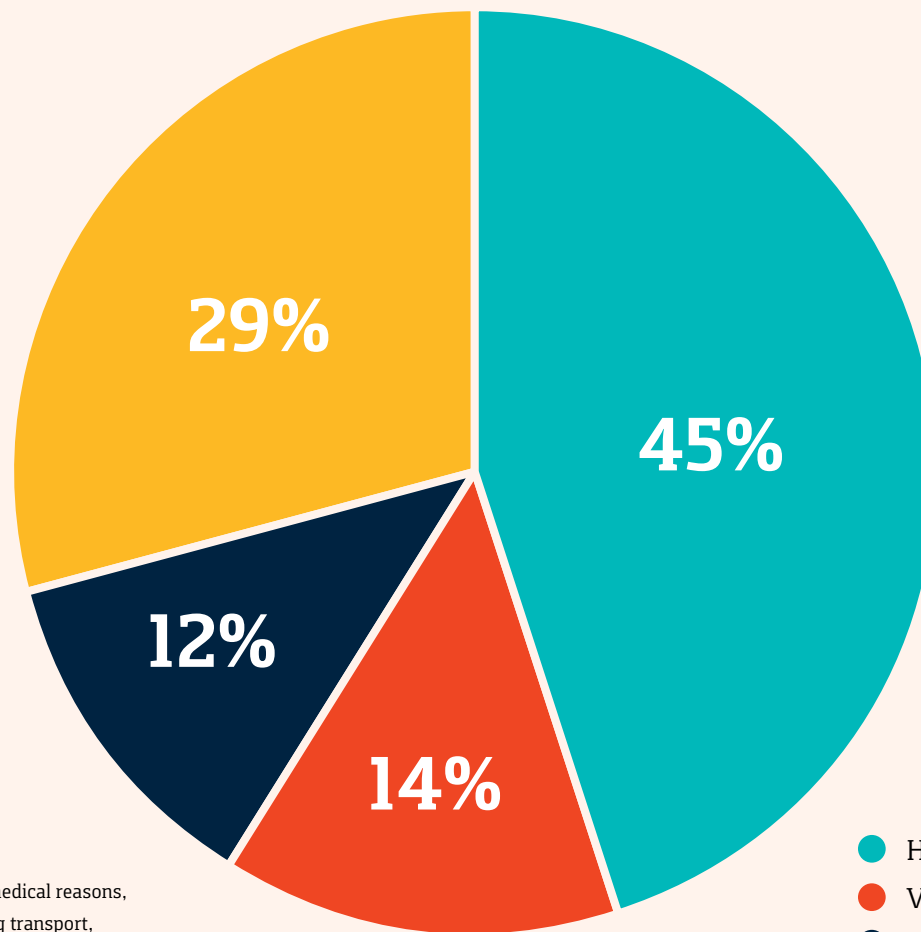
Please note data from 2014 onwards excludes the Albury region SA2 location given it extends beyond the Albury and Wodonga Local Government Areas.

Domestic day visitor trips - by purpose 2015

HOLIDAY OR LEISURE WAS THE PRIMARY PURPOSE FOR DAY VISITS TO ALBURY WODONGA.



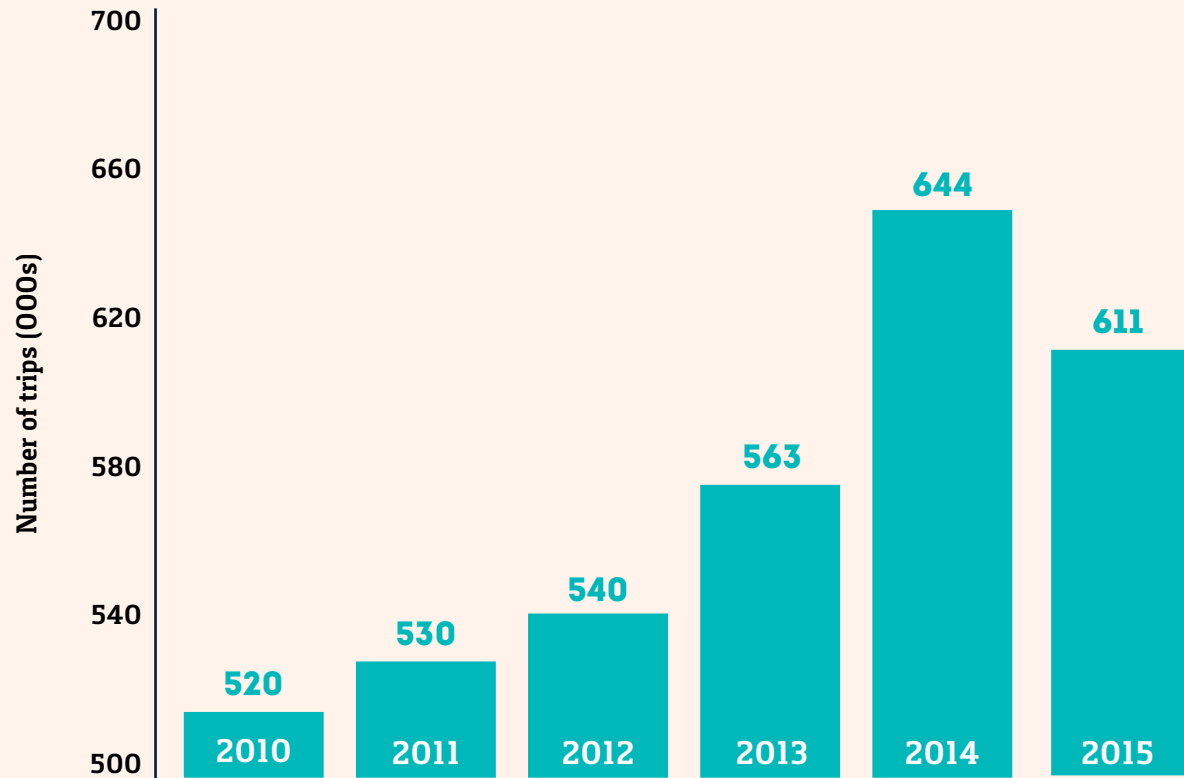
'Other' includes employment, education, medical reasons, personal appointment / business, providing transport, attending funeral and not specified.



- Holiday or leisure
- Visiting friends & relatives
- Business
- Other

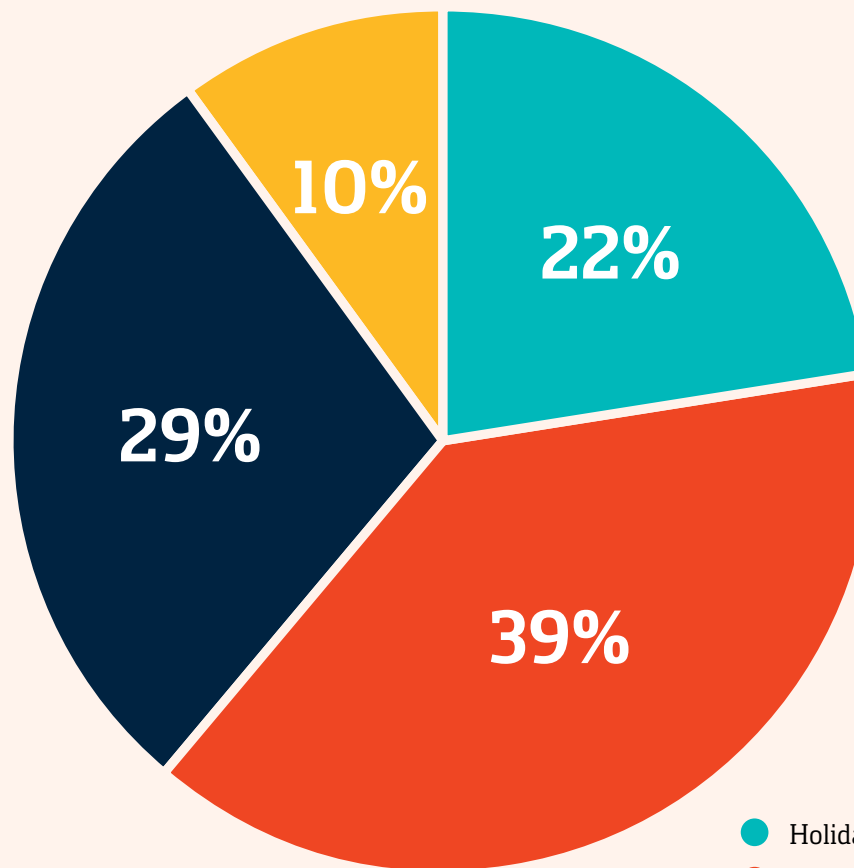
Domestic overnight visitor trips - all purposes 2015

THERE WERE 611,000 DOMESTIC OVERNIGHT VISITORS TO ALBURY WODONGA IN 2015, REPRESENTING A STEADY INCREMENTAL INCREASE OVER PAST YEARS WITH EXCEPTION TO THE SURGE NOTED IN 2014.



Please note data from 2014 onwards excludes the Albury region SA2 location given it extends beyond the Albury and Wodonga Local Government Areas.

Domestic overnight visitor trips - by purpose 2015

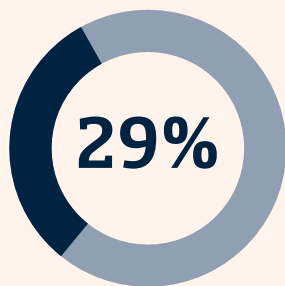


- Holiday or leisure
- Visiting friends & relatives
- Business
- Other

39% of overnight visitors to Albury Wodonga visit to see friends and relatives.

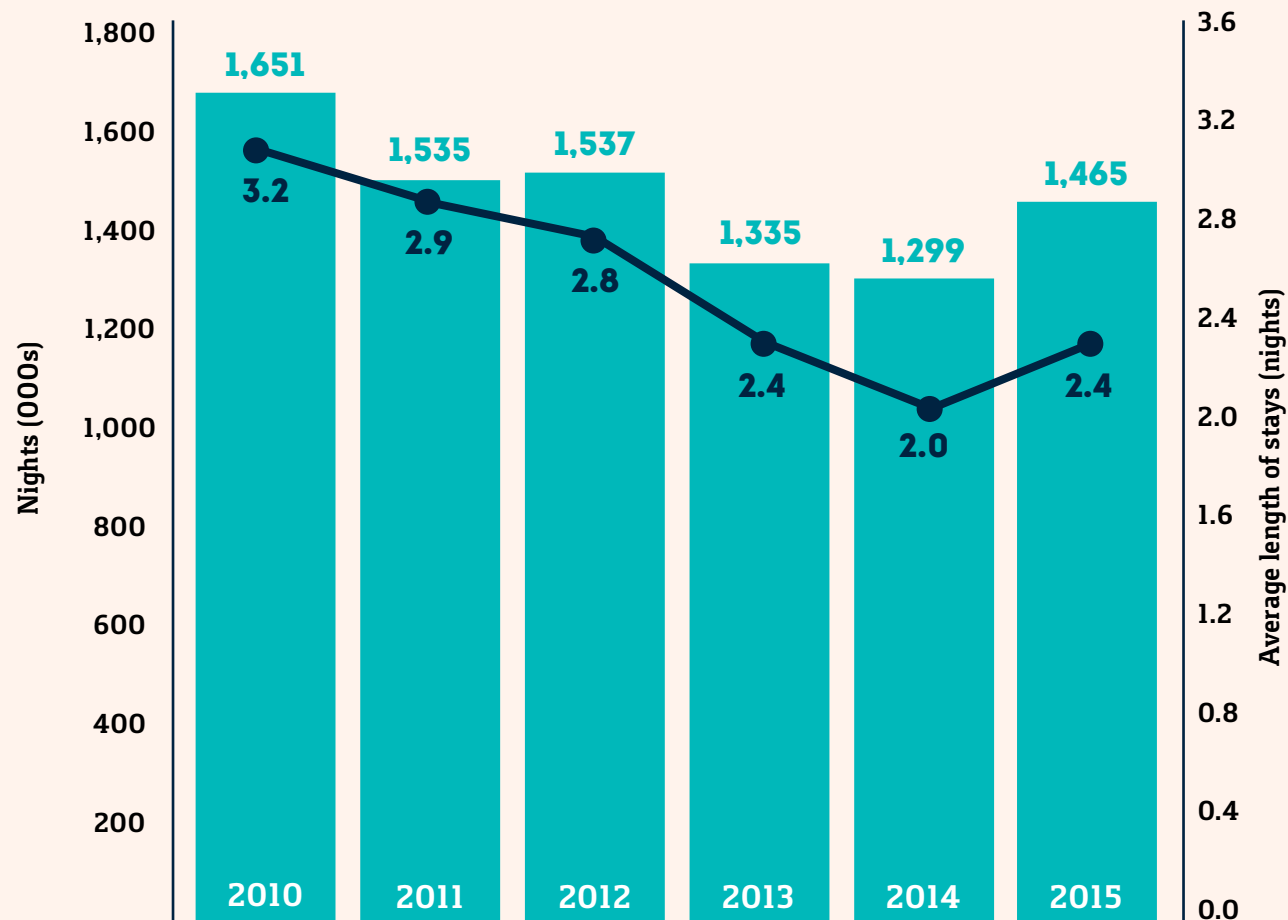


29% visit for business purposes.



Domestic visitor nights - all purposes 2015

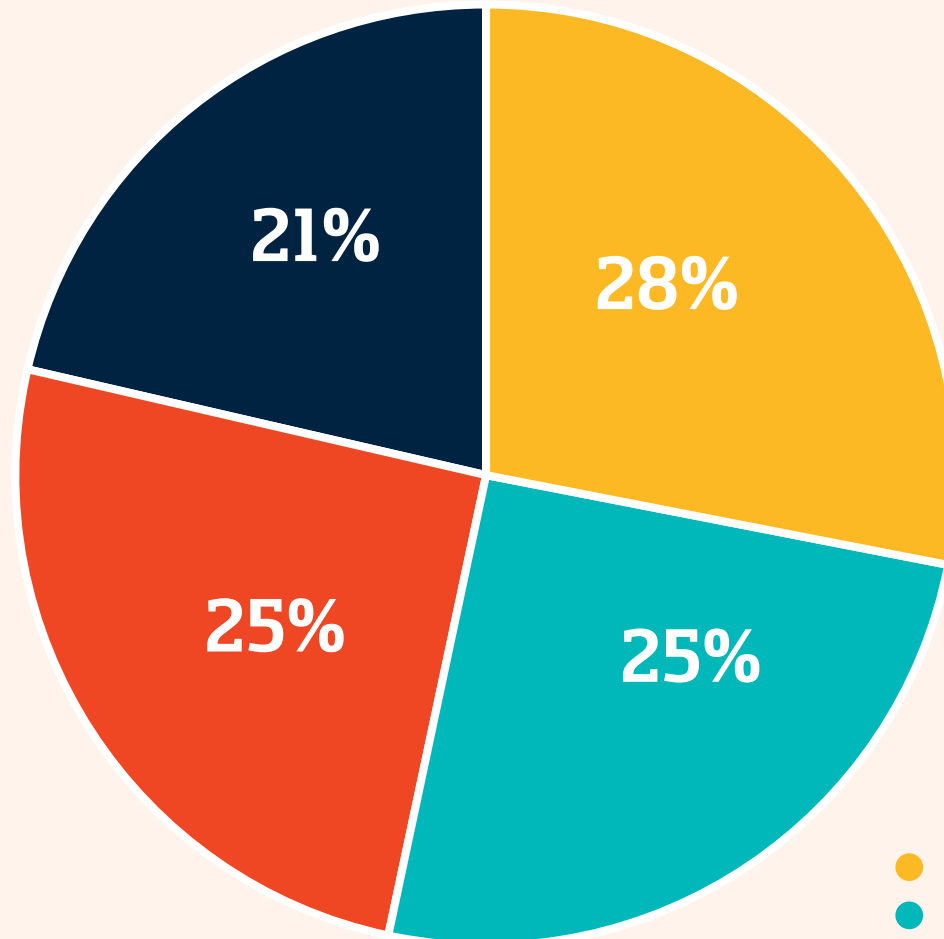
IN 2015 THE NUMBER OF NIGHTS DOMESTIC VISITORS STAYED IN ALBURY WODONGA INCREASED BY 13 PER CENT, WITH AN AVERAGE OF 2.4 NIGHTS STAYED PER TRIP.



Please note data from 2014 onwards excludes the Albury region SA2 location given it extends beyond the Albury and Wodonga Local Government Areas.

Domestic overnight visitor trips - by season 2015

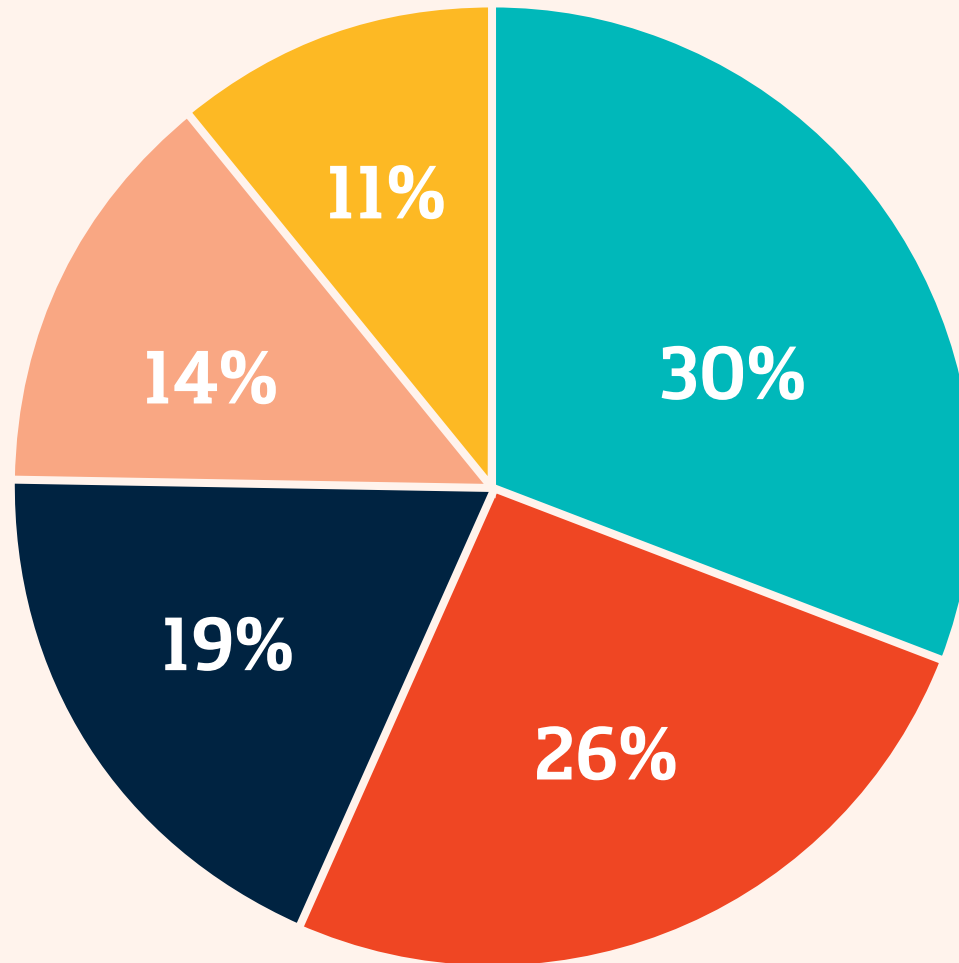
VISITATION TO ALBURY WODONGA IS RELATIVELY CONSISTENT FOR EACH QUARTER, WITH THE WARMER MONTHS MARGINALLY MORE POPULAR FOR VISITORS.



- October - December
- January - March
- April - June
- July - September

Domestic overnight visitors - origin 2015

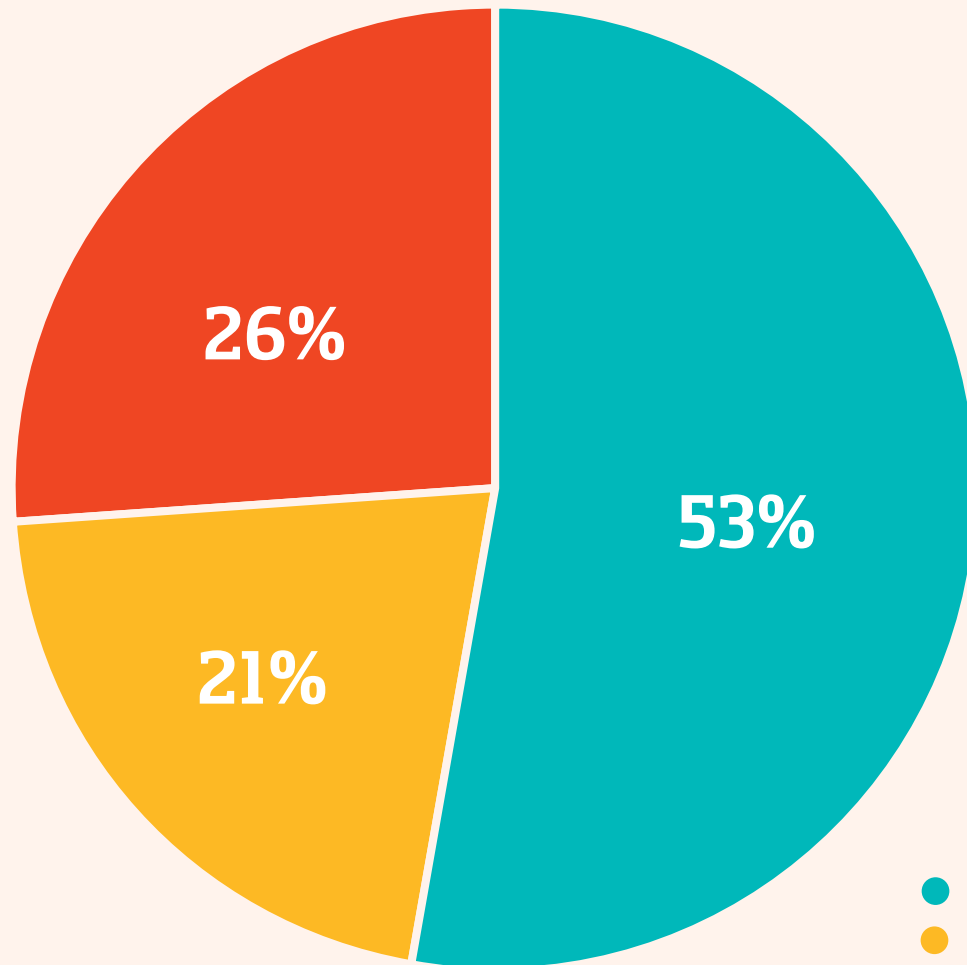
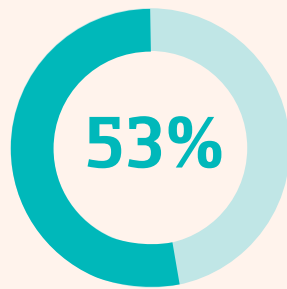
DOMESTIC OVERNIGHT VISITORS PRIMARILY ORIGINATED FROM MELBOURNE AND OTHER AREAS IN VICTORIA.



- Melbourne
- Victoria other
- NSW other
- Other states
- Sydney

Domestic overnight visitors - duration of visit 2015

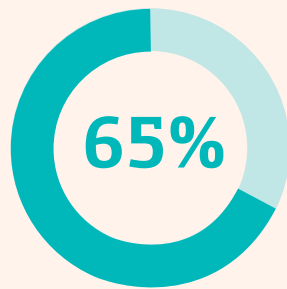
53% of domestic overnight visitors stay in Albury Wodonga for one night.



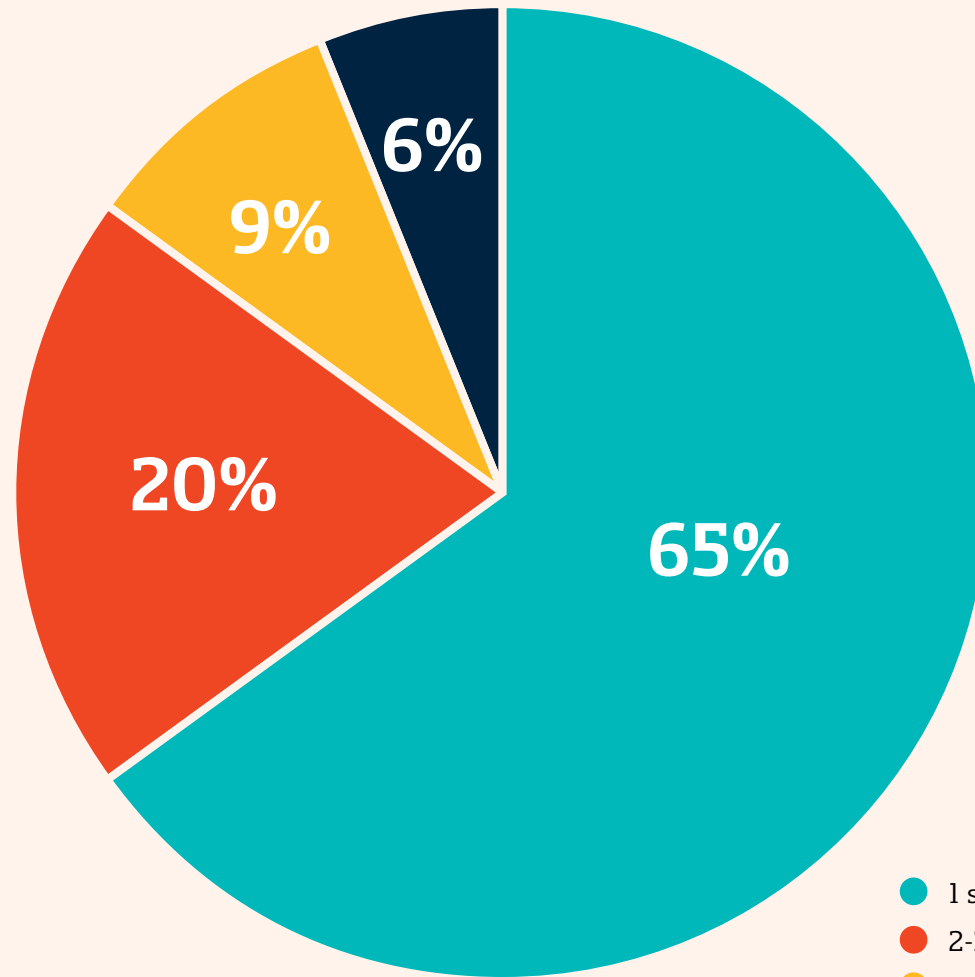
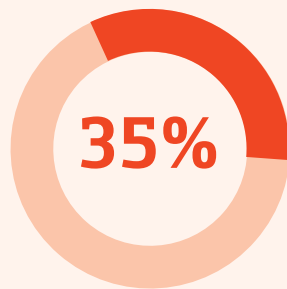
- 1 night
- 3 nights+
- 2 nights

Domestic overnight visitors - stopovers 2015

Albury Wodonga was the single destination for 65% of domestic overnight visitors.



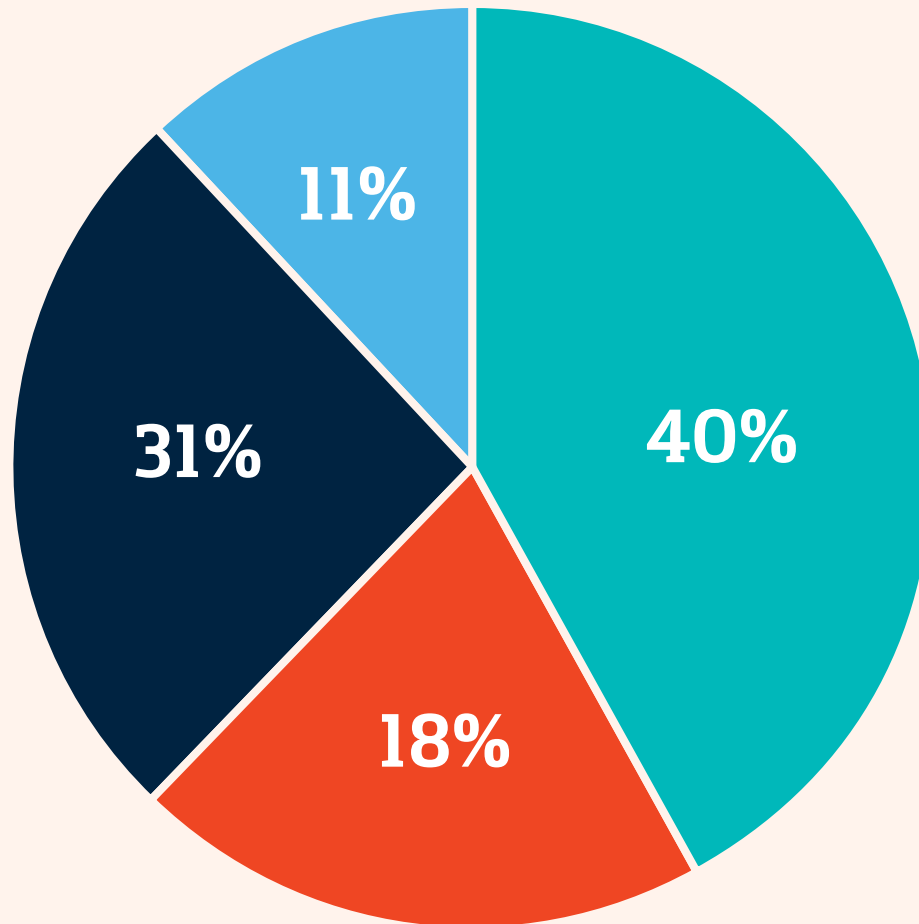
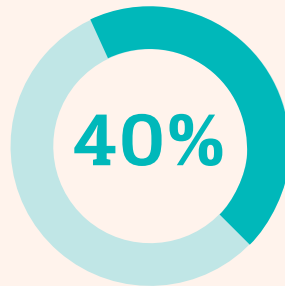
35% of visitors stayed overnight at other destinations during their travels.



- 1 stopover
- 2-3 stopovers
- 4-7 stopovers
- 8 or more stopovers

Domestic overnight visitors - age profile 2015

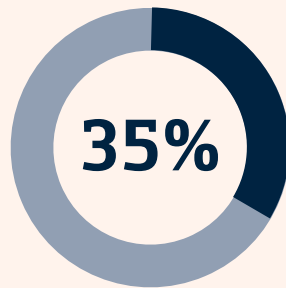
40% of the primary
age group of domestic
overnight visitors is
45 - 64 years.



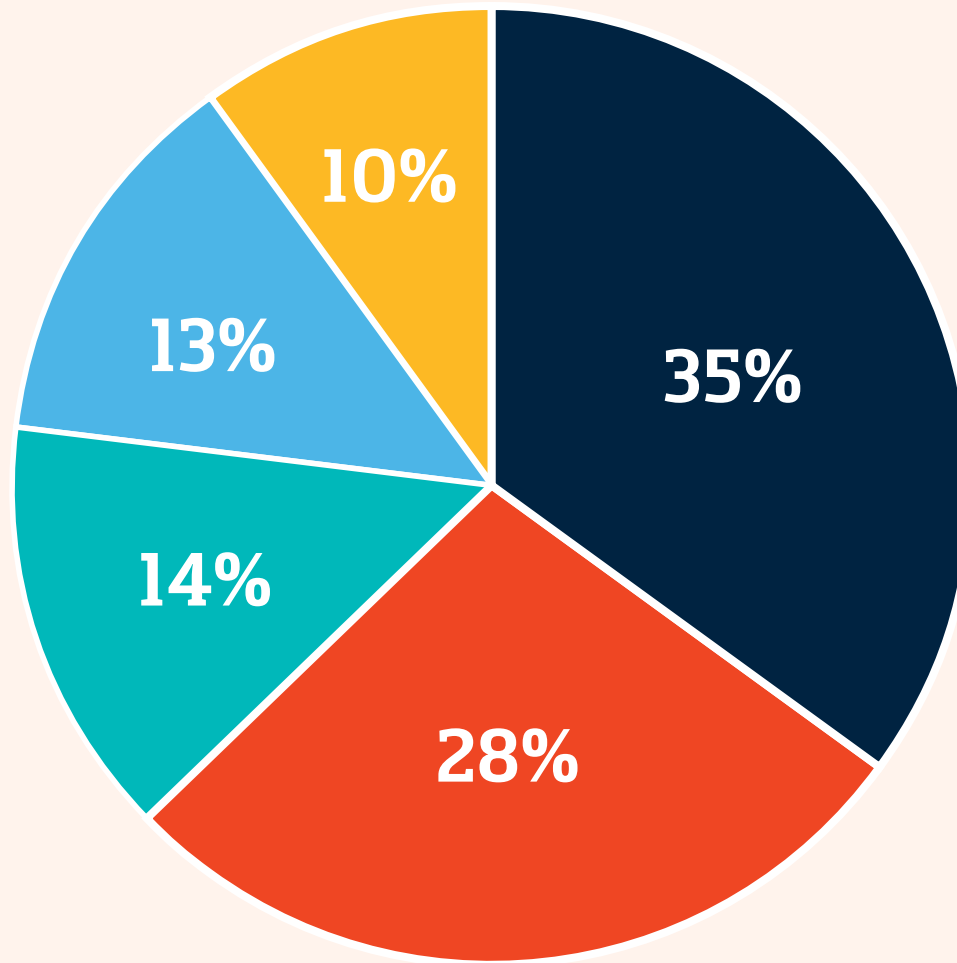
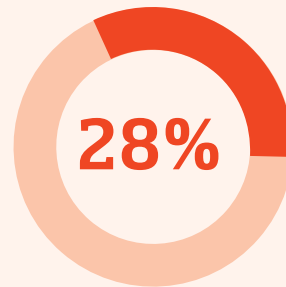
- 45 - 64 years
- 25 - 44 years
- 65 years and over
- 15 - 24 years

Domestic overnight visitors - travel party 2015

People travelling alone
are the most common
travel party visiting
Albury Wodonga.



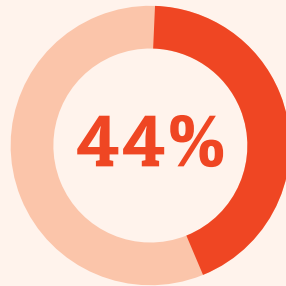
Followed closely
by adult couples.



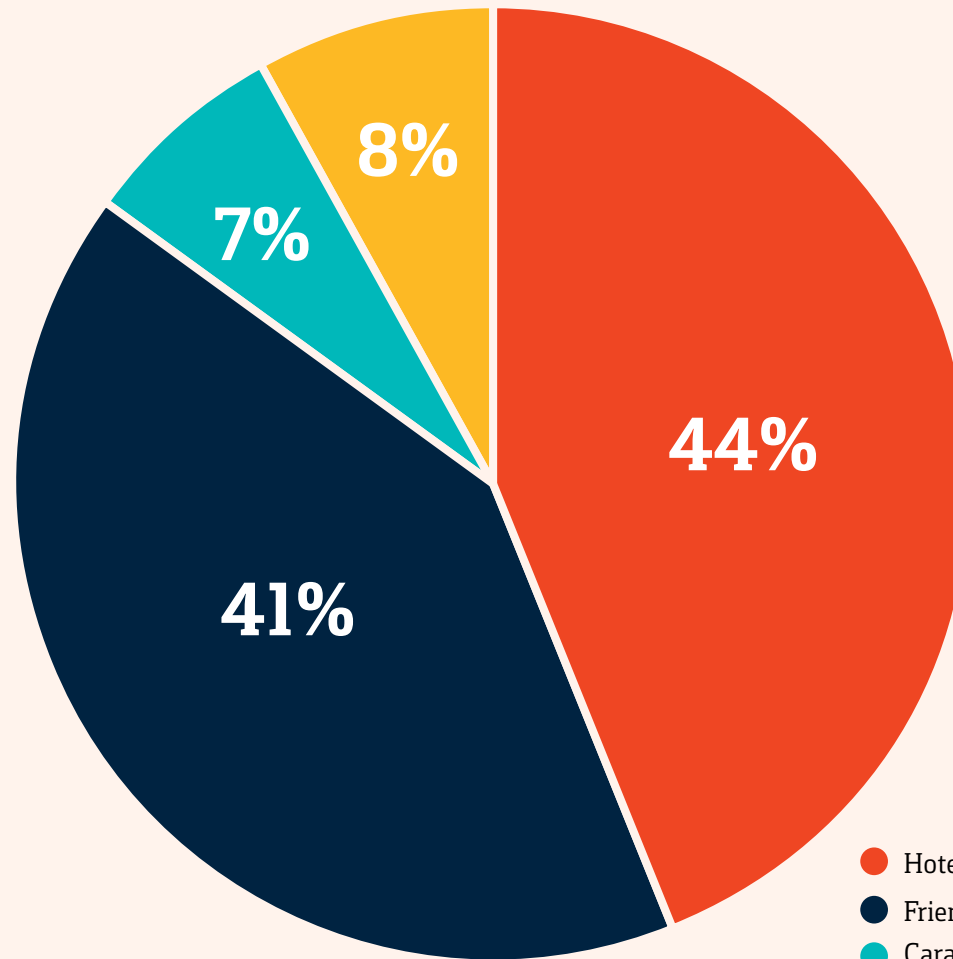
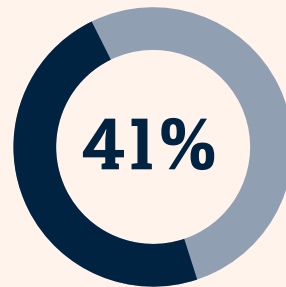
- Travelling alone
- Adult couple
- Friends or relatives travelling together
- Family groups
- Other

Domestic overnight visitors - accommodation 2015

Hotel, resort, motel or motor inn is the most popular type of accommodation used by domestic overnight visitors.



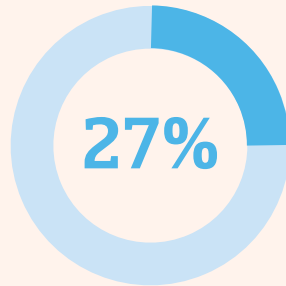
Followed closely by friends' or relatives' property.



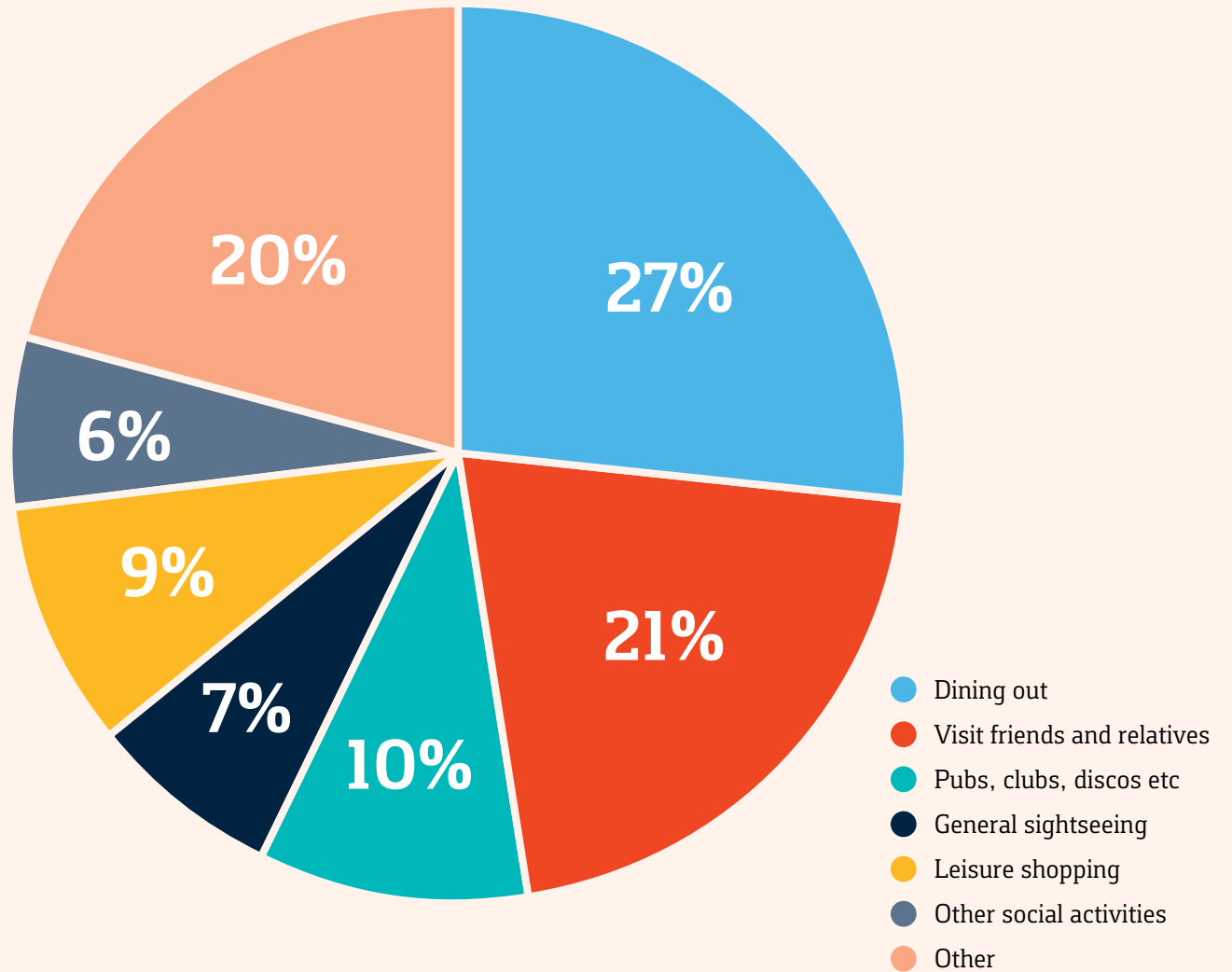
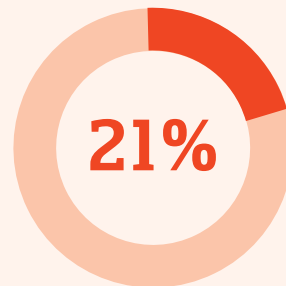
- Hotel, resort, motel or motor inn
- Friends' or relatives' property
- Caravan park or commercial camping
- Other

Domestic overnight visitors - top activities 2015

The most popular activity pursued by domestic overnight visitors is eating out at restaurants and cafes.

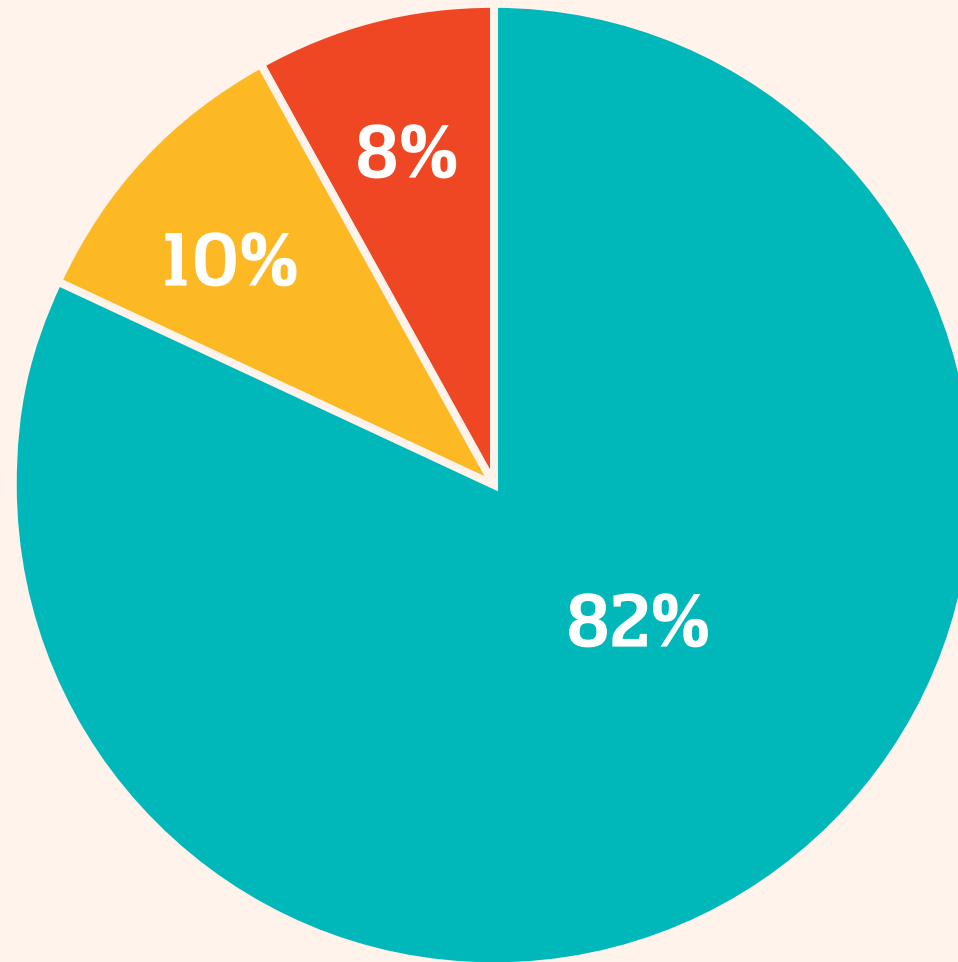
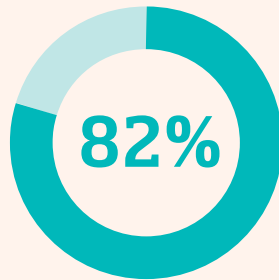


21% of people are visiting friends and family.



Domestic overnight visitors - transport used 2015

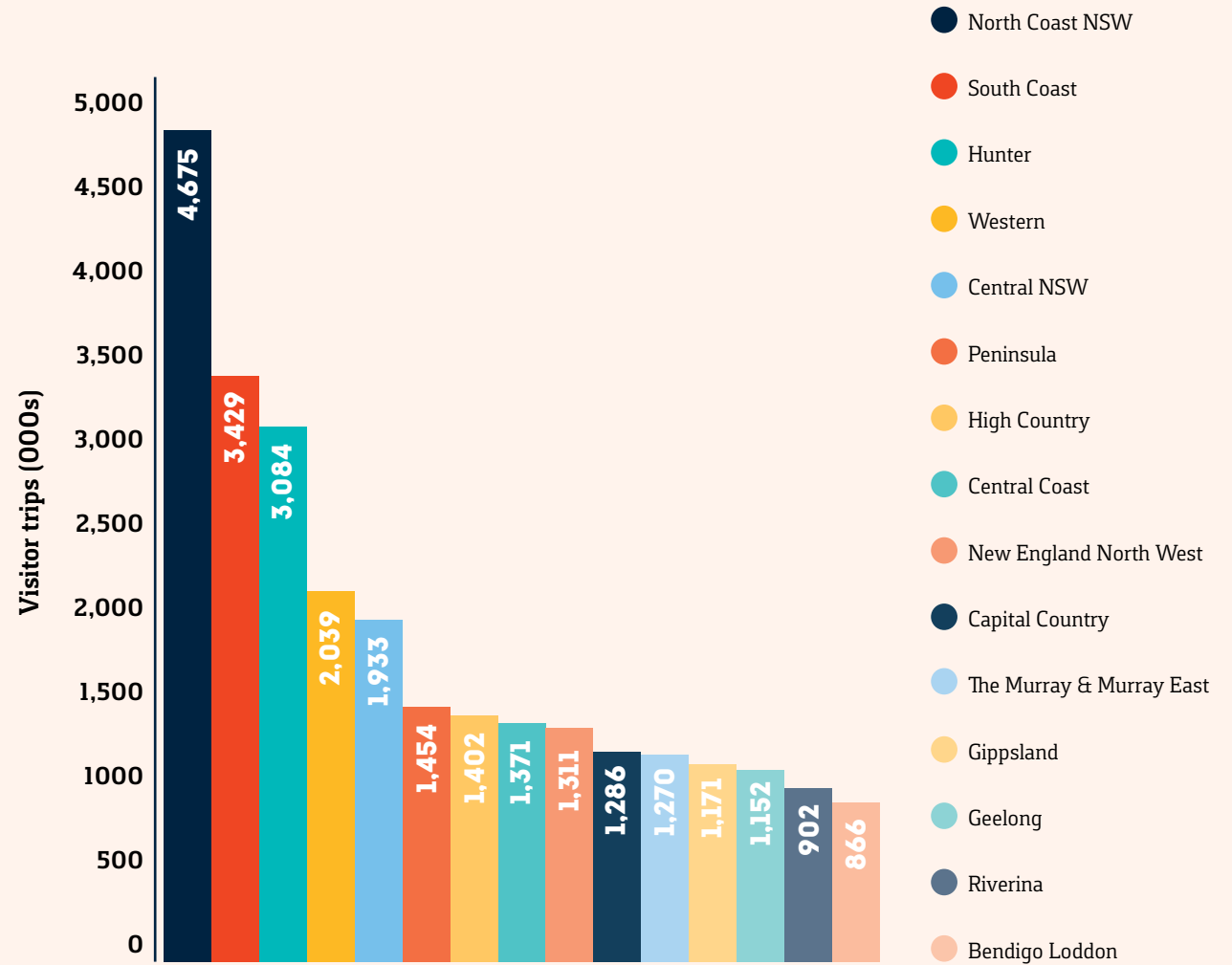
Most domestic overnight visitors drove independently to Albury Wodonga in 2015.



- Self drive
- Air
- Other

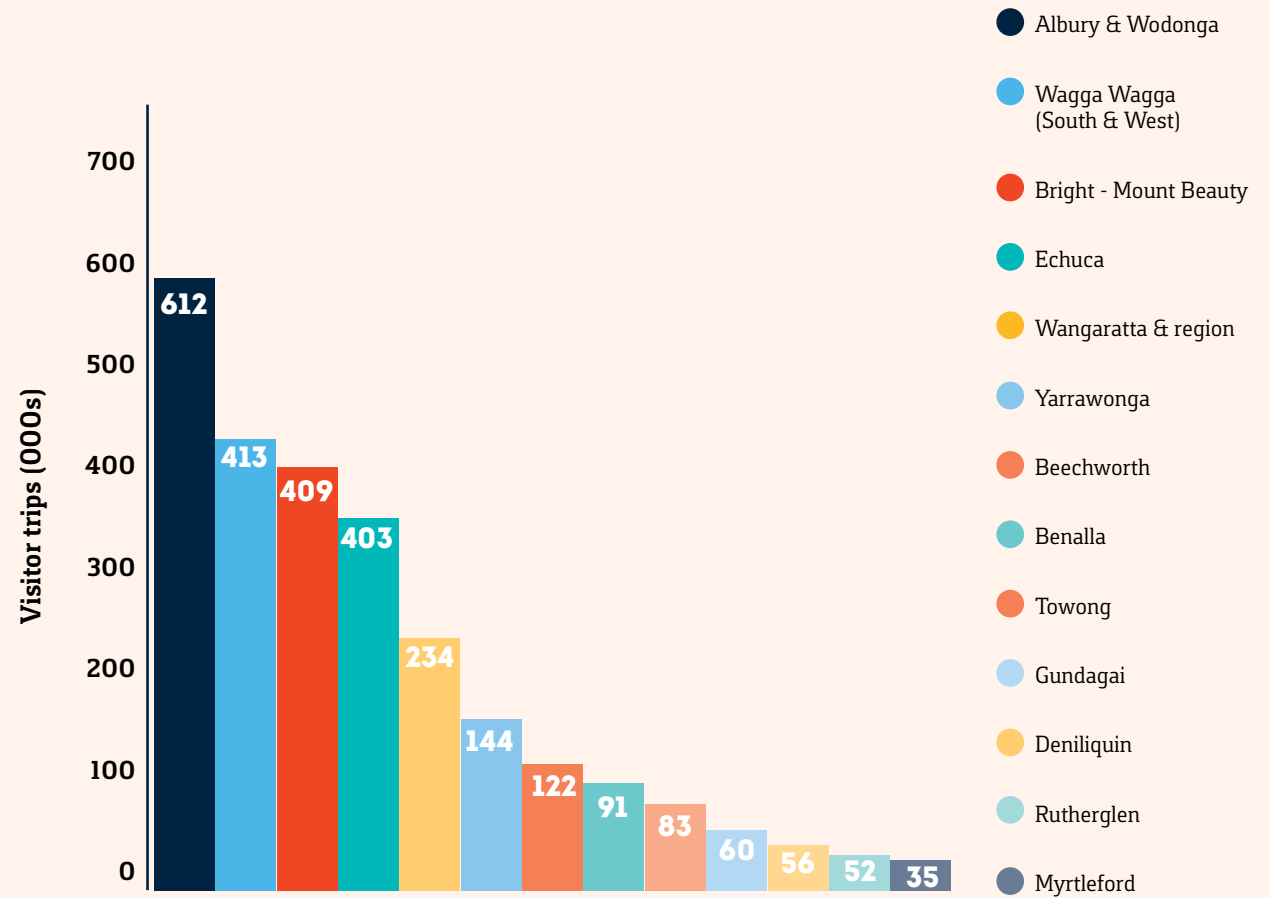
Domestic overnight visitor trips - all purposes - top 15 regional Victorian and NSW regions 2015

THE MURRAY AND MURRAY EAST REGION (OF WHICH ALBURY WODONGA FORMS A PART) HAS THE 11TH HIGHEST LEVEL OF DOMESTIC OVERNIGHT VISITATION WHEN RANKED AMONG OTHER VICTORIAN AND NSW REGIONS.



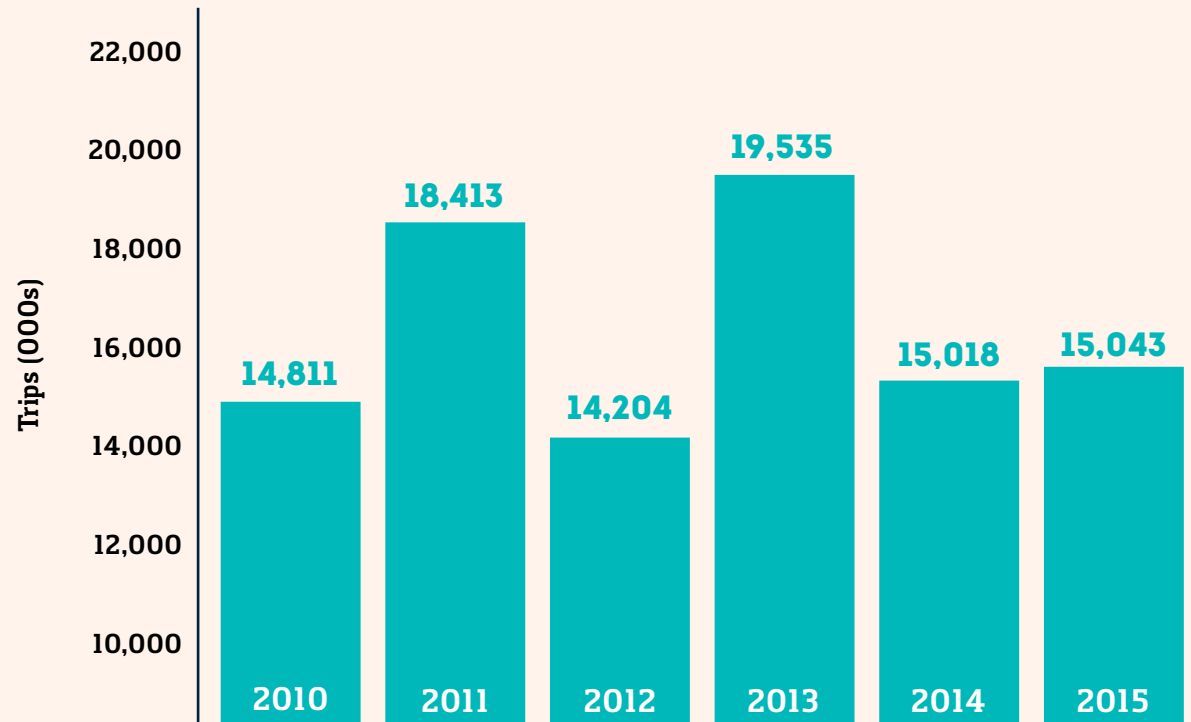
Domestic overnight visitor trips - all purposes - Albury Wodonga and surrounding areas 2015

ALBURY WODONGA COMBINED HAS THE HIGHEST LEVEL OF DOMESTIC OVERNIGHT VISITATION WHEN COMPARED TO SURROUNDING STATISTICAL AREA LEVEL 2 (SA2) LOCATIONS.



International visitor trips - all purposes - Albury Wodonga

A TOTAL OF 15,043 INTERNATIONAL VISITORS WERE RECORDED IN 2015, REPRESENTING A MINOR INCREASE IN COMPARISON TO 2014.



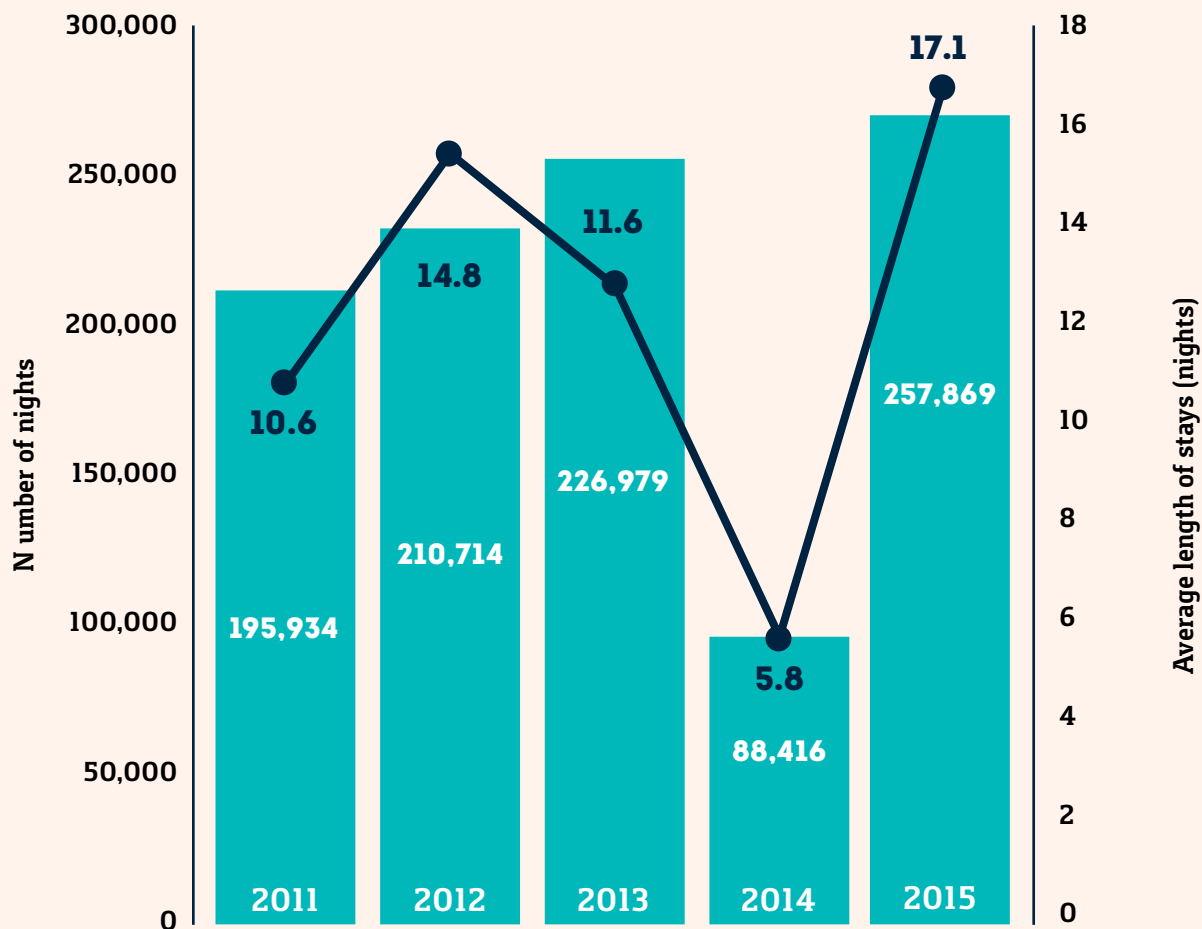
Please note data from 2014 onwards excludes the Albury region SA2 location given it extends beyond the Albury and Wodonga Local Government Areas.

International overnight visitor - nights - all purposes

INTERNATIONAL VISITOR NIGHTS INCREASED BY 169,453 IN 2015, WITH VISITORS STAYING AN AVERAGE OF 17.1 NIGHTS PER TRIP.



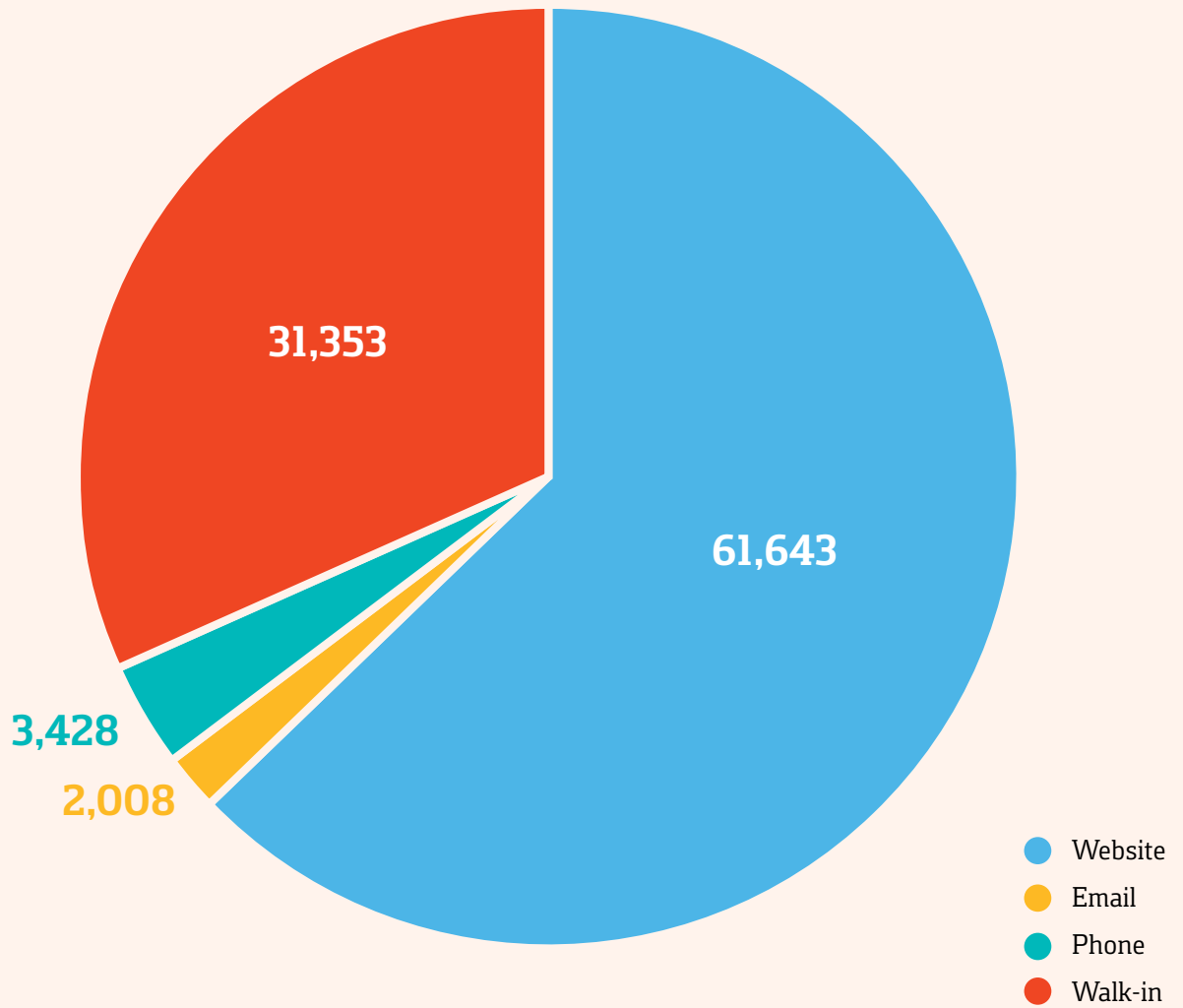
The increase in international visitor nights in 2015 is primarily due to the large increase in employment visitors, who tend to have a longer stay than other visitors, as well as an increase in working holiday makers. In 2014 there were no working holiday makers sampled, but there were 3 in 2015.



Please note data from 2014 onwards excludes the Albury region SA2 location given it extends beyond the Albury and Wodonga Local Government Areas.

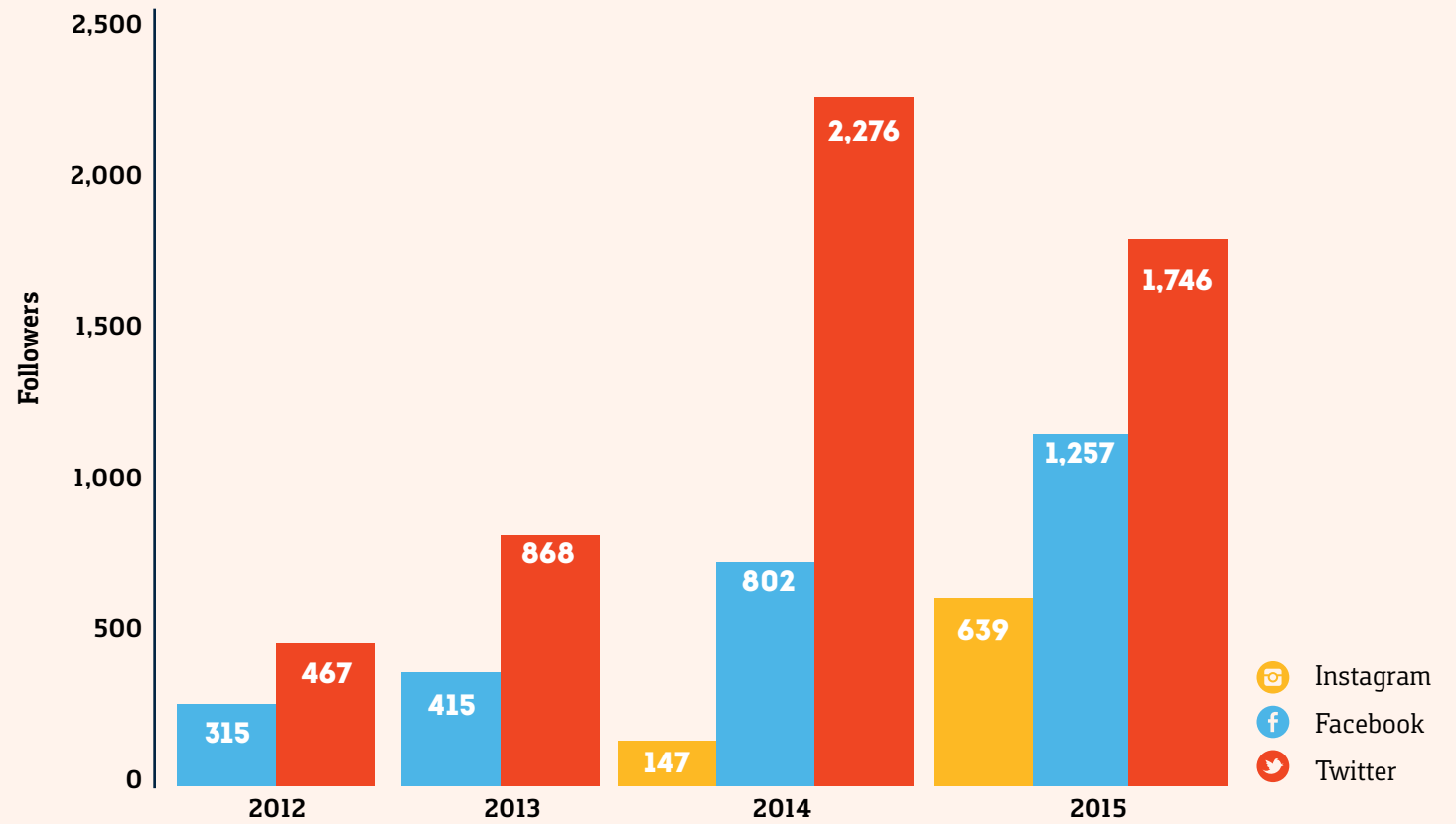
Albury and Wodonga Visitor Information Centres - enquiries 2015

VISITOR ENQUIRIES TOTALLED 98,432 IN 2015, WITH WEBSITE VISITATION BEING THE MOST POPULAR MEDIUM, FOLLOWED BY WALK-INS.



Albury and Wodonga Visitor Information Centres - social media engagement 2015

TWITTER REMAINS THE MOST POPULAR PLATFORM FOR SOCIAL MEDIA TOURISM ENGAGEMENT, FOLLOWED BY FACEBOOK AND INSTAGRAM.



8. Appendix

Appendix A - Data details

Where does the data come from?

Where does the data come from?

The base sources of the data presented in this report are the:

- National Visitor Survey;
- International Visitor Survey;
- Destination Visitor Survey Program;
- Small Scale Accommodation Survey; and,
- Australian Bureau of Statistics (ABS).

National Visitor Survey

The National Visitor Survey is Australia's primary measure of domestic tourism activity with an annual sample of 120,000 Australian residents over the age of 15. Respondents are interviewed using random digit dialling and must not have been away from home continuously for more than 364 days. The survey is conducted by Tourism Research Australia, which is a department of Tourism Australia.

NB - Due to changes to the National Visitor Survey (NVS) methodology (to include mobile phone interviewing and new estimated resident population projections from January 2015), care should be taken when comparing year ending 2015 survey results with those from previous years. These changes represent a break in the time series.

International Visitor Survey

The International Visitor Survey is also conducted by Tourism Research Australia and has been operating since the early 1970s. It surveys 40,000 departing, short-term international travellers over the age of 15 in the departure lounges of Sydney, Melbourne, Brisbane, Cairns, Perth, Adelaide, Darwin and Gold Coast airports. The data collection is based on a proportionate stratified sample by selecting specific flights in order to achieve acceptable sample sizes in various categories.

Destination Visitor Survey Program

The Destination Visitor Survey (DVS) is split into two streams;

- The Visitor Profile and Satisfaction (VPS) Program which provides benchmarked visitor profile and satisfaction data at the tourism region level,
- The Strategic Regional Research (SRR) Program which is based on broader strategic regional issues.

Small Scale Accommodation Survey

The Small Scale Accommodation Survey (SSAS) was launched in February, 2013. Industry participation was very low and as a consequence, there was insufficient data to enable reliable information to be reported for most regions.

While Tourism Research Australia actively promoted the SSAS, the uptake by industry operators was too low for the SSAS to produce the output that was expected. As a consequence, tourism ministers agreed to cease the SSAS. It is worth noting that because this report includes data from 2012-2013, SSAS may have input into data.

Australian Bureau of Statistics

Room occupancy statistics are derived from ABS data releases Tourist Accommodation, Small Area Data, Australia.

How reliable is the data?

The results of the National Visitor Survey and International Visitor Survey are based on a sample, rather than a census of all tourism visitors in Australia and are therefore subject to sampling variability. Due to this variability, figures should never be interpreted literally. In order to determine the degree of variability, every piece of data within the National Visitor Survey and International Visitor Survey has a confidence interval estimate associated with it. This represents the maximum and minimum values within which 95 per cent of all possible samples should actually fall. Users of the data are advised to consult the sample error tables and examples contained in 'Confidence intervals and examples'.

Enquiries

All enquiries about this report should be directed to the economic development team at Wodonga Council (02) 6022 9300 or AlburyCity (02) 6023 8111.

Appendix B - Confidence intervals and examples

In the tables below, the areas above the lines indicate estimates that have large confidence intervals, more than 100 per cent of the estimate in grey above the solid line and between 50 per cent and 100 per cent of the estimate in the area between the dotted and solid lines.

Confidence intervals for International Visitor Survey estimates at the 95% level

Estimate	Visits	Nights	Expenditure
'000	Percent		
2	>50	>100	>100
5	>50	>100	>100
10	43.7	>100	>100
20	31.5	>100	>100
50	20.4	>100	>100
100	14.7	>100	>100
200	10.6	>100	>100
500	6.9	>50	>100
1 000	4.9	46.0	>100
2 000	3.6	32.1	>100
5 000	2.3	20.0	>100
10 000	1.7	14.0	>50
20 000		9.7	>50
50 000		6.1	45.7
100 000		4.2	33.5
200 000		3.0	24.5
500 000		1.8	16.2
1 000 000			11.9
2 000 000			8.7
5 000 000			5.8
10 000 000			4.2

International Visitor Survey example

If the estimated number of Chinese visitors who stayed in NSW was 100,000, then looking at the visits column of the table above, an estimate of 100,000 has a 95 per cent confidence interval of 14.7 per cent. There are 19 chances out of 20 that the true number of Chinese who stayed in NSW is within 100,000 plus or minus 14.7 per cent of this number i.e. in the range of 85,300 to 114,700.

Confidence intervals for National Visitor Survey estimates at the 95% level

Estimate	Overnight visitors	Visitor nights	Overnight expenditure	Day visitors	Day visitor expenditure	Overseas trips
'000	Percent					
20	>50	>100	>100	>100	>100	>100
50	>50	>100	>100	>50	>100	>100
80	41.5	>100	>100	>50	>100	>100
100	37.5	>50	>100	>50	>100	>100
200	27.4	>50	>100	42.7	>100	>50
300	22.8	>50	>100	35.7	>100	>50
500	18.1	48.3	>100	28.5	>100	>50
1 000	18.2	35.8	>100	21.0	>100	>50
2 000	9.7	26.6	>100	15.4	>100	43.6
3 000	8.1	22.3	>100	12.9	>100	38.2
5 000	6.4	17.9	>100	10.3	>50	32.3
7 000	5.5	15.5	>100	8.9	>50	29.0
10 000	4.7	13.3	>50	7.6	>50	
20 000	3.4	9.8	>50	5.6	>50	
30 000	2.8	8.3	>50	4.7	44.3	
50 000	2.3	6.6	49.4	3.7	37.1	
70 000	1.9	5.7	43.6	3.2	32.7	
100 000		4.9	38.2	2.7	28.7	
200 000		3.6	29.6	2.0	22.2	
500 000			21.1		15.8	

These estimates are subject to sampling variability that is too high for practical purposes and should be used with caution as they have a large margin of error. The area below the dotted line contains estimates with smaller confidence intervals.

That is, the estimates are closer to the values that would be obtained if the entire Australian population was interviewed.

National Visitor Survey example

The estimated number of overnight visitors to a particular state was 7 million.

Looking at the 'Overnight visitors' column this estimate has a 95 per cent confidence interval width of 5.5 per cent. That is, there are 19 chances in 20 that if the entire population had been included in the survey a figure within the range 7 million, plus or minus 5.5 per cent between 6,615,000 to 7,385,000, would have been obtained for visitors to that state. Further information is available online at tra.australia.com

Appendix C - Glossary

Average stay

The sum of all nights divided by the sum of all visitors for a particular category. This is commonly referred to as average length of stay.

Average nightly expenditure

The sum of all expenditure divided by the sum of all nights for a particular location.

Business visitors

Visitors who nominate business as their primary reason for travelling. Business travel comprises business, work travel for transport crews, attendance at conferences, conventions, exhibitions, tradefairs, seminars, incentive group meetings, marketing events, and training and research related to employment.

Domestic day visitors

Those domestic visitors aged 15 years or more who travel for a round trip distance of at least 50 kilometres, and are away from home for at least four hours, and do not spend a night away from home as part of their travel. Same-day travel as part of overnight and international travel is excluded, as is routine travel such as commuting between work/school and home.

Domestic overnight visitors

Those domestic visitors aged 15 years or more who undertake trips that involve a stay away from home of at least one night, but less than one year, at a place at least 40 kilometres from home.

Expenditure

Money spent by, and on behalf of, travellers during a trip. Expenditure items include airfares and other transport costs such as bus and train fares and amounts spent on trip-related items before and after the trip. Expenditure on capital goods, such as motor vehicles and other major capital goods, is not included in the estimates as this is not regarded as tourism expenditure.

Holiday/leisure visitors

Visitors whose primary reason for travelling is having a holiday. Holiday/leisure travel in the National Visitor Survey comprises holidays, travel for leisure, relaxation and just getting away, entertainment, sport (both participation and as a spectator) and shopping. The International Visitor Survey includes additional categories for accompanying a business traveller, working holiday, honeymoon, to experience Australia's food, wine or wineries, to experience Aboriginal culture or to attend an organised sporting event.

International visitors

Overseas visitors visiting Australia for a period of less than 12 months, aged 15 years or more and not residents of Australia.

Interstate visitors

Australians who visit one or more state or territories other than that in which they reside.

Nights

The number of nights spent away from home (and in Australia for international visitors) in association with individual trips.

Origin of visitors

For international visitors, this is the country of residence where most tourists to a particular location come from. Some countries are grouped to form a larger area (for example, other Europe). For domestic visitors, this is the tourism region where most visitors to a particular location come from.

Tourism regions

Are formed predominantly by the aggregation of ABS statistical area two areas (SA2).

Visiting friends or relatives

Visitors who nominate visiting friends or relatives as their main reason for travelling. Visiting friends and relatives also includes travel to attend a friend's or relative's wedding or travel to attend a funeral.

Visitors

Travellers who stay for one or more nights in a location while travelling (domestic overnight visitors and international visitors) or spend at least four hours on a round trip more than 50 kilometres away from home (domestic day visitors).

Albury Visitor Information Centre

Railway Place, Cnr Smollett and Young Sts

Albury NSW 2640

T 1300 252 879

info@visitalburywodonga.com

Wodonga Visitor Information Centre

69 to 73 Hovell St

Wodonga VIC 3690

T 1300 796 222

tourism@wodonga.vic.gov.au



see both sides