My name is Steve Parkin. I have relied on tourism for my income since I moved here in 2010.

My wife Ruth and I have operated The Buckets Way Motel and now the King Street Motel in town and the past seven years have been a roller coaster.

I have read the Department's report. It is wrong. It makes claims that don't stack up. – to many conflicting reports (attached)

I would like to focus on tourism, and the Department's claims that the mine would conflict with tourism land uses. Clearly whoever wrote the report does not work in tourism in this area.

Destination NSW claims tourism in the Gloucester area generates a tourism spend of $51 million per year. This is a daily spend of $139,726 in the Gloucester area, or $283 per person. = 493 people per day

Now I don't know how they generate those figures, but as an operator, I can tell you that these figures are wrong – they are aren't based on fact.

I would like to explain why the figures don't add up.

In 2013/14 our occupancy was above 90%. AGL was in town, Duralie was pumping and for a four month period were actually had 114% occupancy with people hot bedding etc. Income was substantially good. 60% of our business was resource-industry related.

AGL pulled out of town and occupancy reduced to 65%. At this time Yancoal took over Stratford and Duralie and the management team stayed regularly.

The following year as Duralie started to rationalise (closing a pit and cutting staff by half). Occupancy dropped below industry standards to 48%.

Engineering businesses reduced staff and cut back. Many locals moved out of town as well.

We have had a continual decline since mining operations cut back at Duralie and tourism businesses are now struggling. Restaurants in some businesses have closed.

Many tourism operators don't have the income to invest into their business, into tourism more broadly or into the community.

Every year we increase our tarrifs in line with increased costs to do business. Every year power prices go up, water prices go up, gas prices go up, the cost of consumables increases. But visitors won't pay increased costs. They query the rates now. Last year we couldn't increase tarrifs and next year it will probably be the same. Can't afford to put rates up. But my costs are going up and profits are going backwards.

Occupancy this year verses last is the same. Income is 20% less. Hence why I am back on the tools. It's not what I had in mind when I moved to Gloucester for the tourism lifestyle but I need to maintain business until GRL is up and running and we get an influx of people into to town.

I know some operators are discounting up to 20% off their usual rates. If there was such a booming tourism industry in Gloucester that needed protecting, we wouldn't be discounting and our tarrifs would be increased in line with costs.

So numbers don't tell the story of what is happening on the ground.

This is my story – but it is reflective of the industry. People don't want to voice it publicly, which is understandable, but I don't see that I have any choice but to be brutally honest with you, so that you might really understand what is going on. Many people fear for the implications of their business if the mine doesn't proceed.

Tourism isn't just about bird watching and bush walking – business tourism is what keeps businesses alive. The community benefits from the knock-on effect of business tourism. Cafes and pubs are full, butchers and bakers are well supported and tourism operators are busy. When there is no business tourism, we don't have staff coming to town to book out rooms, eat in cafes and restaurants and support the local economy. We all suffer the knock-on effect.

A lot of businesses like mine on life support.

I would like to point out that we have mines in this region. Visitors come here and have no idea there is a coal mine. A lot of tourists come here to visit the Barrington Tops National Park. This mine is a long way from Barrington Tops and won't impact tourism, just as Duralie hasn't impacted visitation to the Tops.

My wife and I have had to consider our future if this mine doesn't proceed. I see negative growth for Gloucester if the mine doesn't proceed. There is no other industry that will sustain it. Our future, and that of many other businesses and tourism operators in the area, will struggle to stay alive. We need a lifeline. Rocky Hill can provide that lifeline.

[redacted]

LGA PROFILE - Gloucester

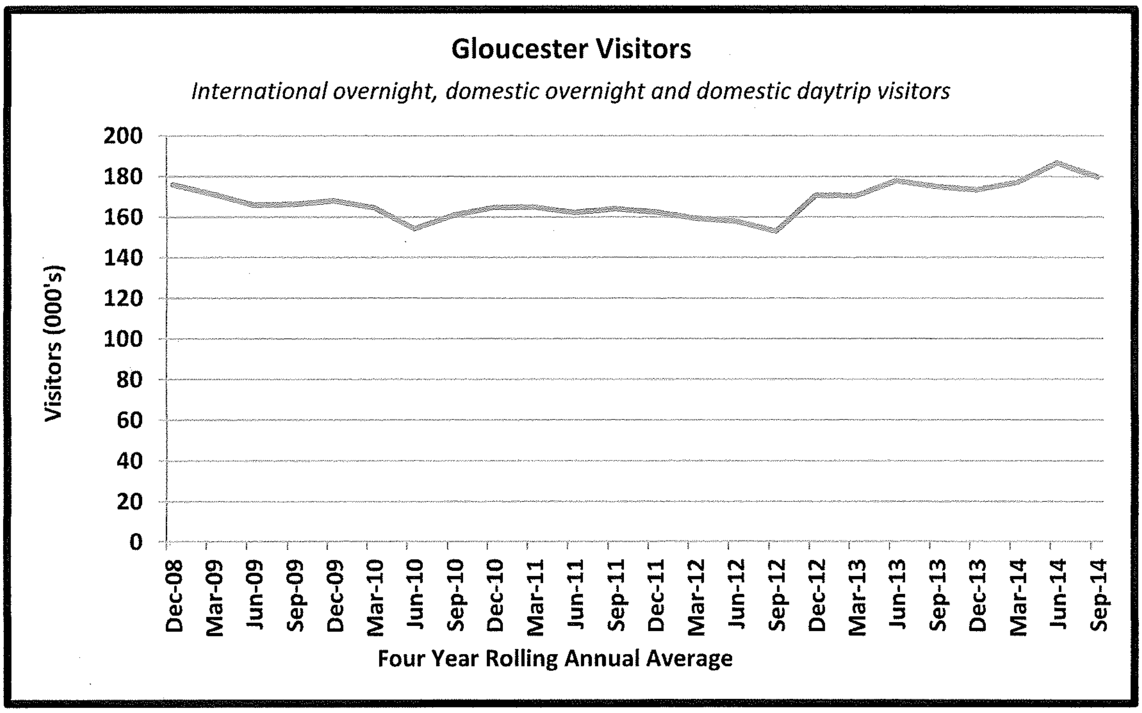
Destination NSW

OVERVIEW

Four year annual average to the year ending September 2014

People = 493 per day (NOT RIGHT)

Key Measures	Gloucester	NSW
Total Visitors (overnight and domestic daytrip) (000's)	180	80,316
Total Overnight Visitors (000's)	97	28,105
Total Nights (000's)	268	154,563
Total Spend (overnight and domestic daytrip) ($ Million)	51	26,503
Total Overnight Visitor Spend ($ Million)	43	20,955



SOURCE: International Visitor Survey and National Visitor Survey, Tourism Research Australia (TRA)

NOTES:

Geographical groupings: The information contained within this document is based on statistical geographical areas known as SA2s which have been drawn by the Australian Bureau of Statistics (ABS). The use of SA2 regions rather than Local Government Areas (LGAs) means that the above data is for a geographic region that may not exactly match the boundaries of the LGA in question. As such, the data in this report should be considered as the best approximation of the visitor profile in each LGA.

TRA's change to SA2 reporting means that this profile is not comparable with previous LGA profile reports.

Expenditure: Expenditure for this LGA is based on the TRA estimates for the larger tourism region. Expenditure = spend per night in the tourism region x number of nights spent in the LGA (daytrip visitor spend based on visitor numbers).

Four Year Annual Average: A four year annual average is the sum of the figures (visitors, nights or expenditure) from the last four years divided by four. (Year Ending (YE) Sep 2011 + YE Sep 2012 + YE Sep 2013 + YE Sep 2014) / 4 = Four year annual average ending September 2014.

*The presence of a star indicates that there is an insufficient survey sample for this category. As a result, the corresponding data cannot be published.

INTERNATIONAL TRAVEL

Four year annual average to the year ending September 2014

Key Measures	Gloucester	NSW
Visitors (000's)	1	2,910
Nights (000's)	6	70,300
Average Length of Stay (nights)	5.5	24.2
Expenditure ($ Million)	0	6,488
Spend per visitor ($)	364	2,229
Spend per night ($)	67	92

SOURCE: International Visitor Survey, YE September 2011 to YE September 2014, TRA

An **International Visitor** is a foreign resident over 15 years of age who visited Australia for a period of less than 12 months and spent at least one night in the respective LGA.

*The presence of a star indicates that there is an insufficient survey sample for this category. As a result, the corresponding data cannot be published.

DOMESTIC OVERNIGHT TRAVEL

Four year annual average to the year ending September 2014

Key Measures	Gloucester	NSW
Visitors (000's)	96	25,194
Nights (000's)	262	84,263
Average Length of Stay (nights)	2.7	3.3
Expenditure ($ Million)	43	14,467
Spend per visitor ($)	445	574
Spend per night ($)	164	172

Purpose of Visit (visitors)	000's	LGA %	NSW %
Holiday	61	64%	42%
VFR	27	28%	37%
Business	*	*	17%
Other	*	*	6%

Purpose of Visit (nights)	000's	LGA %	NSW %
Holiday	179	68%	47%
VFR	55	21%	35%
Business	*	*	13%
Other	*	*	5%

Top 3 Transport Types (visitors)	000's	LGA %	NSW %
Private or company vehicle	91	95%	76%
Camper van or motor home	*	*	0%
Bus or coach	*	*	2%

Origin (visitors)	000's	LGA %	NSW %
Sydney	33	34%	28%
Regional NSW	55	57%	41%
Total Intrastate	88	92%	68%
Victoria	*	*	11%
Queensland	*	*	11%
ACT	*	*	5%
Other Interstate	*	*	4%
Total Interstate	*	*	32%

Origin (nights)	000's	LGA %	NSW %
Sydney	107	41%	26%
Regional NSW	132	50%	36%
Total Intrastate	239	91%	62%
Victoria	*	*	13%
Queensland	*	*	14%
ACT	*	*	5%
Other Interstate	*	*	7%
Total Interstate	*	*	38%

DOMESTIC OVERNIGHT TRAVEL

Four year annual average to the year ending September 2014

Top 5 Activities (visitors)	000's	LGA %	NSW %
Eat out at restaurants	38	40%	58%
Visit friends and relatives	30	31%	49%
Bushwalking or rainforest walks	30	31%	10%
General sight seeing	26	28%	25%
Visit national parks or State parks	20	21%	9%

Top 5 Accommodation Types (nights)	000's	LGA %	NSW %
Caravan/camping near road or on private property	64	25%	4%
Caravan park or commercial camping ground	51	20%	13%
Friends or relatives property	44	17%	39%
Own property (e.g. holiday house)	*	*	4%
Rented house, apartment, flat or unit	*	*	10%

Travel Party (visitors)	000's	LGA %	NSW %
Adult couple (in a relationship sense)	29	31%	27%
Travelling with Children	27	28%	26%
Friends or relatives - without children	23	24%	15%
Travelling alone	*	*	26%
Business Associates	*	*	4%
Other	*	*	2%

Age Group (visitors)	000's	LGA %	NSW %
15 - 24 years	*	*	15%
25 - 34 years	*	*	17%
35 - 44 years	21	21%	18%
45 - 54 years	21	22%	19%
55 - 64 years	20	21%	16%
65 years or over	14	14%	15%

SOURCE: National Visitor Survey, YE September 2011 to YE September 2014 , TRA

A **Domestic Overnight Visitor** is an Australian resident over 15 years of age who spent at least one night away from home (but no more than 12 months) at a location at least 40 km from home.

*The presence of a star indicates that there is an insufficient survey sample for this category. As a result, the corresponding data cannot be published.

DOMESTIC DAYTRIP TRAVEL

Four year annual average to the year ending September 2014

Key Measures	Gloucester	NSW
Visitors (000's)	82	52,212
Expenditure ($ Million)	8	5,548
Spend per visitor ($)	100	106

SOURCE: National Visitor Survey, YE September 2011 to YE September 2014, TRA

A **Domestic Daytrip Visitor** is an Australian resident over 15 years of age who went on a trip of at least four hours duration (but did not stay the night) and with a round trip distance of at least 50 km. Routine trips (such as travel to work) and daytrips undertaken as part of a longer overnight trip are not included.

*The presence of a star indicates that there is an insufficient survey sample for this category. As a result, the corresponding data cannot be published.

Travel to The Hunter Tourism Region
Year ended June 2017

Source: National and International Visitor Surveys, TRA.

Destination NSW

OVERVIEW

GRAND TOTAL - overnight & daytrip	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	% change YE Jun17 vs. YE Jun16	% change YE Jun17 vs. YE Jun09
Visitors ('000)	7,661	8,901	9,269	9,014	8,396	8,729	9,370	9,964	10,191	2.3%	33.0%
Nights ('000)	9,041	10,134	10,705	10,209	9,843	10,241	11,190	11,021	11,687	6.0%	29.3%
Expenditure ($ million)*	$1,734	$1,884	$2,094	$2,019	$1,901	$2,099	$2,282	$2,313	$2,520	8.9%	45.3%

Overnight - Int'l & domestic											
Visitors ('000)	2,645	2,919	3,102	2,817	2,995	2,991	3,255	3,381	3,533	4.5%	33.5%
Nights ('000)	9,041	10,134	10,705	10,209	9,843	10,241	11,190	11,021	11,687	6.0%	29.3%
Expenditure ($ million)*	$1,224	$1,347	$1,537	$1,404	$1,382	$1,454	$1,638	$1,606	$1,784	11.1%	45.8%

Domestic - overnight & daytrip											
Visitors ('000)	7,530	8,757	9,114	8,886	8,264	8,585	9,206	9,811	10,004	2.0%	32.9%
Nights ('000)	7,320	7,806	8,087	7,638	7,895	7,588	8,658	8,347	8,648	3.6%	18.1%
Expenditure ($ million)*	$1,598	$1,745	$1,920	$1,847	$1,757	$1,932	$2,104	$2,138	$2,299	7.5%	43.9%

DOMESTIC OVERNIGHT TRAVEL

Visitors, Nights and Expenditure

	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	% change YE Jun17 vs. YE Jun16	% change YE Jun17 vs. YE Jun09
Visitors (000)	2,514	2,775	2,948	2,688	2,862	2,847	3,091	3,229	3,346	3.6%	33.1%
Nights (000)	7,320	7,806	8,087	7,638	7,895	7,588	8,658	8,347	8,648	3.6%	18.1%
Average Length of Stay	2.9	2.8	2.7	2.8	2.8	2.7	2.8	2.6	2.6	0.0%	-11.2%
Expenditure ($ million)*	$1,088	$1,208	$1,363	$1,231	$1,238	$1,287	$1,460	$1,431	$1,563	9.2%	43.7%
Spend per visitor per night ($)	$149	$155	$169	$161	$157	$170	$169	$171	$181	5.4%	21.6%

Purpose of Visit

Visitors (000)	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	% change YE Jun17 vs. YE Jun16	% change YE Jun17 vs. YE Jun09
Holiday	1,149	1,329	1,345	1,188	1,158	1,219	1,357	1,323	1,403	6.1%	22.1%
Visiting Friends & Relatives	940	1,040	1,024	959	1,132	1,118	1,113	1,237	1,265	2.3%	34.5%
Business	337	279	459	433	408	387	496	474	491	3.6%	45.9%
Other	107	142	128	123	173	143	140	208	221	6.4%	106.7%
Total	2,514	2,775	2,948	2,688	2,862	2,847	3,091	3,229	3,346	3.6%	33.1%

Nights (000)	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	% change YE Jun17 vs. YE Jun16	% change YE Jun17 vs. YE Jun09
Holiday	3,475	3,809	3,933	3,421	3,413	3,500	3,956	3,475	3,714	6.9%	6.9%
Visiting Friends & Relatives	2,456	3,011	2,510	2,633	2,725	2,817	2,992	3,112	3,277	5.3%	33.5%
Business	974	608	1,351	1,326	1,062	842	1,434	1,299	1,235	-5.0%	26.8%
Other	416	377	292	258	694	428	276	460	422	-8.3%	1.5%
Total	7,320	7,806	8,087	7,638	7,895	7,588	8,658	8,347	8,648	3.6%	18.1%

Origin

Visitors (000)	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	% change YE Jun17 vs. YE Jun16	% change YE Jun17 vs. YE Jun09
Regional NSW	1,030	1,180	1,288	1,134	1,348	1,318	1,255	1,327	1,261	-5.0%	22.3%
Sydney	1,142	1,201	1,200	1,127	1,082	1,111	1,312	1,433	1,518	5.9%	32.9%
Total Intrastate	**2,172**	**2,381**	**2,487**	**2,261**	**2,430**	**2,429**	**2,567**	**2,760**	**2,779**	0.7%	27.9%
Victoria	n/p	119	116	141	150	124	165	119	181	52.5%	-
Queensland	n/p	n/p	n/p	n/p	182	182	210	217	265	21.9%	-
ACT	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	-	-
Other Interstate	n/p	61	79	71	62	67	81	n/p	n/p	-	-
Total Interstate	**342**	**394**	**460**	**427**	**433**	**418**	**524**	**468**	**568**	21.2%	66.1%
Grand Total	**2,514**	**2,775**	**2,948**	**2,688**	**2,862**	**2,847**	**3,091**	**3,229**	**3,346**	3.6%	33.1%

Age

Visitors (000)	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	% change YE Jun17 vs. YE Jun16	% change YE Jun17 vs. YE Jun09
15-29	662	683	726	491	561	606	723	785	722	-8.0%	9.1%
30-39	457	509	504	463	505	463	482	551	597	8.3%	30.5%
40-49	399	419	576	534	548	617	531	507	606	19.7%	51.8%
50-59	475	544	574	545	528	521	610	615	597	-2.9%	25.8%
60-69	354	398	394	478	478	402	483	512	513	0.2%	45.0%
70+	167	223	173	177	243	237	262	259	310	20.0%	86.1%
Total	2,514	2,775	2,948	2,688	2,862	2,847	3,091	3,229	3,346	3.6%	33.1%

Travel to The Hunter Tourism Region
Year ended June 2017

Destination NSW

Source: National and International Visitor Surveys, TRA.

Travel Party

Visitors (000)	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
Travelling alone	488	550	599	532	742	722	777	866	919	*6.2%*	*88.6%*
Adult couple	775	849	847	918	840	749	967	931	1,018	*9.3%*	*31.3%*
Family group - parent(s) and children	684	847	839	681	690	693	646	695	666	*-4.1%*	*-2.6%*
Friends and/ or relatives travelling together	389	406	457	371	479	540	535	539	567	*5.2%*	*45.8%*
Business associates travelling together with(out) spouse	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	-	-
Other	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	-	-
Total	2,514	2,775	2,948	2,688	2,862	2,847	3,091	3,229	3,346	*3.6%*	*33.1%*

Top 5 Activities (sorted by the latest year)

Visitors (000)	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
Eat out / dine at a restaurant and/or cafe	1,306	1,470	1,616	1,484	1,498	1,688	1,867	1,853	2,098	*13.2%*	*60.6%*
Visit friends & relatives	1,154	1,338	1,341	1,188	1,392	1,410	1,383	1,424	1,508	*5.9%*	*30.7%*
Go to the beach	534	576	577	611	667	655	712	813	768	*-5.6%*	*43.6%*
Sightseeing/looking around	571	741	790	664	687	737	696	765	755	*-1.3%*	*32.2%*
Pubs, clubs, discos etc	567	564	570	579	627	572	664	747	712	*-4.7%*	*25.6%*

Top 3 types of Accommodation used (sorted by the latest year)

Nights (000)	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
Friends or relatives property	2,852	3,296	2,997	2,828	3,144	2,988	3,429	3,177	3,583	*12.8%*	*25.6%*
Hotel/resort/motel or motor Inn	1,753	1,783	2,203	2,036	1,888	1,942	2,362	2,108	2,193	*4.0%*	*25.1%*
Rented house/apartment/flat or unit	1,029	882	863	1,190	1,055	996	995	1,071	909	*-15.1%*	*-11.6%*

Top 3 types of Transport used (sorted by the latest year)

Visitors (000)	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
Private vehicle or company car	2,175	2,352	2,497	2,330	2,524	2,420	2,684	2,772	2,849	*2.8%*	*31.0%*
Aircraft	202	192	243	185	212	172	215	186	258	*38.4%*	*27.5%*
Railway	n/p	153	113	n/p	n/p	125	n/p	172	135	*-21.5%*	-

INTERNATIONAL OVERNIGHT TRAVEL

Visitors, Nights and Expenditure

	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
Visitors (000)	131.1	144.2	154.2	128.4	132.7	143.5	164.3	152.5	186.3	*22.1%*	*42.0%*
Nights (000)	1,720.4	2,328.0	2,617.7	2,570.5	1,947.8	2,653.7	2,531.7	2,674.4	3,038.6	*13.6%*	*76.6%*
Average Length of Stay	13.1	16.1	17.0	20.0	14.7	18.5	15.4	17.5	16.3	*-6.9%*	*24.3%*
Expenditure ($ million)*	$136.1	$139.0	$174.6	$172.5	$143.7	$167.5	$177.2	$174.8	$220.9	*26.4%*	*62.3%*
Spend per visitor per night ($)	$79	$60	$67	$67	$74	$63	$70	$65	$73	*11.2%*	*-8.1%*

Purpose of Visit

Visitors (000)	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
Holiday	83.3	91.6	98.4	70.9	76.7	88.3	93.9	86.6	110.9	*28.1%*	*33.2%*
Visiting Friends & Relatives	28.2	34.7	35.7	38.5	39.8	37.6	43.8	43.7	53.1	*21.5%*	*88.1%*
Business	11.2	10.8	11.8	9.5	9.7	9.8	15.4	9.2	13.0	*40.8%*	*16.1%*
Employment	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	-	-
Education	5.9	5.0	6.0	6.3	3.9	5.5	6.3	9.6	7.8	*-18.2%*	*32.8%*
Other^	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	-	-
Total	131.1	144.2	154.2	128.4	132.7	143.5	164.3	152.5	186.3	*22.1%*	*42.0%*

Nights (000)	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
Holiday	332.6	565.7	700.4	674.9	498.9	882.7	590.8	570.3	544.0	*-4.6%*	*63.6%*
Visiting Friends & Relatives	394.4	506.8	513.1	491.4	593.4	642.3	675.5	723.1	1,086.2	*50.2%*	*175.4%*
Business	51.3	157.7	54.5	123.2	55.8	93.3	106.7	84.8	96.9	*14.2%*	*88.9%*
Employment	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	-	-
Education	633.0	584.2	675.1	960.8	480.8	711.9	694.8	930.4	904.3	*-2.8%*	*42.9%*
Other^	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	-	-
Total	1,720.4	2,328.0	2,617.7	2,570.5	1,947.8	2,653.7	2,531.7	2,674.4	3,038.6	*13.6%*	*76.6%*

Top 3 Int'l source markets to The Hunter

Visitors (000)	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
United Kingdom	36.4	35.2	31.4	23.1	24.0	22.2	27.6	31.6	30.1	*-4.6%*	*-17.3%*
United States of America	14.8	15.3	17.0	11.2	17.9	17.9	15.6	17.9	21.3	*18.5%*	*43.4%*
New Zealand	13.6	14.9	18.5	15.2	16.9	16.0	20.9	15.9	18.8	*18.4%*	*38.1%*

Travel to The Hunter Tourism Region
Year ended June 2017

Destination NSW

Source: National and International Visitor Surveys, TRA.

Age

	Visitors (000)										
	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
15-29	57.4	57.2	62.1	56.6	51.1	57.8	62.6	60.8	68.8	*13.1%*	*19.9%*
30-39	20.9	23.4	27.3	18.2	18.9	20.2	25.6	25.9	29.6	*14.1%*	*41.5%*
40-49	13.2	16.9	21.6	15.8	16.8	17.0	21.0	16.4	18.3	*11.4%*	*38.9%*
50-59	18.7	24.2	22.2	16.8	20.8	21.3	22.4	18.0	31.4	*74.0%*	*68.2%*
60-69	18.4	17.3	16.8	15.0	18.4	19.3	24.8	23.0	30.6	*33.3%*	*66.9%*
70+	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	-	-
Total	131.1	144.2	154.2	128.4	132.7	143.5	164.3	152.5	186.3	*22.1%*	*42.0%*

Travel Party

	Visitors (000)										
	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
Travelling alone	72.7	87.4	85.6	71.9	72.8	77.2	86.2	81.0	98.9	*22.2%*	*36.0%*
Adult couple	35.4	35.6	39.5	31.2	32.0	32.8	42.1	38.7	43.2	*11.7%*	*22.1%*
Family group - parent(s) and children	n/p	n/p	9.8	10.9	10.9	13.2	14.3	11.7	21.2	*81.8%*	-
Friends and/ or relatives travelling together	12.6	13.2	14.7	10.3	13.0	18.0	16.9	18.6	18.7	*0.3%*	*48.7%*
Business associates travelling together with(out) spouse	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	-	-
Other	-	-	n/p	n/p	n/p	n/p	n/p	n/p	n/p	-	-
Total	131.1	144.2	154.2	128.4	132.7	143.5	164.3	152.5	186.3	*22.1%*	*42.0%*

Top 5 activities on the trip to Australia (sorted by the latest year)

	Visitors (000)										
	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
Eat out / dine at a restaurant and/or cafe	121.2	130.1	135.9	112.5	119.1	129.9	151.1	140.8	175.5	*24.6%*	*44.8%*
Sightseeing/looking around	105.3	117.7	121.2	99.5	106.0	111.7	129.0	121.6	150.2	*23.5%*	*42.6%*
Go to the beach	104.5	116.3	116.8	96.8	101.6	115.7	129.6	127.6	149.1	*16.9%*	*42.8%*
Go shopping for pleasure	103.1	112.6	112.9	96.2	100.9	110.9	126.1	122.9	148.0	*20.4%*	*43.6%*
Visit national parks / state parks	85.4	87.2	88.5	70.7	76.7	84.6	97.4	97.0	112.9	*16.4%*	*32.1%*

First or Return Visitor to Australia

	Visitors (000)										
	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
First visit	70.4	76.1	77.8	57.4	63.1	68.3	73.2	67.0	75.4	*12.5%*	*7.1%*
Return visit	60.8	68.1	76.4	71.0	69.6	75.2	91.1	85.5	110.9	*29.7%*	*82.5%*
Total	131.1	144.2	154.2	128.4	132.7	143.5	164.3	152.5	186.3	*22.1%*	*42.0%*

Top 3 types of Accommodation (sorted by the latest year)

	Nights (000)										
	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
Friends or relatives property	511.4	732.4	749.2	677.2	720.9	928.5	761.7	769.1	1,221.2	*58.8%*	*138.8%*
Rented house/apartment/flat or unit	626.2	795.3	1,233.7	1,023.3	701.6	1,088.4	1,079.4	912.5	937.0	*2.7%*	*49.6%*
Standard hotel/motor inn (below 4 star)	68.9	99.0	106.4	82.7	86.6	87.8	103.9	83.7	93.8	*12.1%*	*36.1%*

Top 3 types of Transport used (sorted by the latest year)

	Visitors (000)										
	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
Self drive vehicle	86.7	96.0	101.0	84.7	86.0	92.2	103.3	97.3	122.7	*26.0%*	*41.5%*
Long distance transport	31.9	36.6	34.7	29.1	28.5	29.9	31.7	27.8	38.5	*38.5%*	*20.5%*
Aircraft	14.4	13.2	19.7	16.4	15.6	15.6	20.0	15.3	20.1	*31.1%*	*39.4%*

DOMESTIC DAYTRIP TRAVEL

Visitors and Expenditure

	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
The Hunter	5,016	5,982	6,166	6,198	5,401	5,738	6,115	6,582	6,658	*1.2%*	*32.7%*
Expenditure ($ million)*	$510	$536	$557	$615	$520	$645	$644	$707	$736	*4.1%*	*44.4%*
Spend per visitor ($)	$102	$90	$90	$99	$96	$112	$105	$107	$111	*2.9%*	*8.8%*

Main Purpose of Trip

	Visitors (000)										
	YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
Holiday	2,411	2,600	2,609	2,373	2,289	2,468	3,029	2,980	3,098	*4.0%*	*28.5%*
Visiting Friends & Relatives	1,563	2,075	1,948	1,996	1,677	1,903	1,670	1,829	1,993	*9.0%*	*27.5%*
Business	606	631	925	966	682	671	652	799	710	*-11.2%*	*17.1%*
Other	436	675	684	862	753	695	764	974	857	*-12.0%*	*96.6%*
Total	5,016	5,982	6,166	6,198	5,401	5,738	6,115	6,582	6,658	*1.2%*	*32.7%*

Travel to The Hunter Tourism Region
Year ended June 2017

Source: National and International Visitor Surveys, TRA.

Origin

	Visitors (000) YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
Sydney	1,645	1,764	1,681	1,598	1,735	1,840	1,807	1,912	1,863	*-2.6%*	*13.2%*
Regional NSW	3,352	4,193	4,380	4,569	3,661	3,898	4,277	4,656	4,771	*2.5%*	*42.4%*
Total Intrastate	4,997	5,957	6,061	6,168	5,396	5,738	6,084	6,568	6,634	*1.0%*	*32.8%*
Total Interstate	n/p	n/p	n/p	n/p	n/p	-	n/p	n/p	n/p	-	-
Total	5,016	5,982	6,166	6,198	5,401	5,738	6,115	6,582	6,658	*1.2%*	*32.7%*

Age

	Visitors (000) YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
15-29	1,210	1,383	1,175	1,110	n/p	957	1,281	1,422	1,069	*-24.8%*	*-11.7%*
30-39	839	1,045	1,139	1,116	n/p	1,085	1,148	970	1,075	*10.8%*	*28.1%*
40-49	847	836	1,080	1,104	969	951	1,135	1,145	1,321	*15.4%*	*56.0%*
50-59	870	1,172	1,148	1,178	1,199	1,058	1,156	1,216	1,146	*-5.8%*	*31.7%*
60-69	749	910	1,013	1,074	1,015	1,040	970	1,226	1,063	*-13.3%*	*42.0%*
70+	500	634	612	615	699	647	425	603	983	*63.0%*	*96.4%*
Total	5,016	5,982	6,166	6,198	5,401	5,738	6,115	6,582	6,658	*1.2%*	*32.7%*

Top 5 activities (sorted by the latest year)

	Visitors (000) YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
Eat out / dine at a restaurant and/or cafe	1,977	2,539	2,450	2,516	2,361	2,796	2,712	3,236	3,185	*-1.6%*	*61.1%*
Visit friends & relatives	1,893	2,494	2,152	2,334	1,833	2,381	2,067	2,272	2,400	*5.6%*	*26.8%*
Go shopping for pleasure	1,007	1,219	1,001	1,190	994	1,060	1,035	1,158	1,242	*7.3%*	*23.3%*
Sightseeing/looking around	713	919	820	788	809	1,008	941	962	878	*-8.7%*	*23.2%*
Go to the beach	534	573	561	584	550	722	649	908	645	*-28.9%*	*20.9%*

Top 3 types of Transport used (sorted by the latest year)

	Visitors (000) YE Jun 2009	YE Jun 2010	YE Jun 2011	YE Jun 2012	YE Jun 2013	YE Jun 2014	YE Jun 2015	YE Jun 2016	YE Jun 2017	*% change YE Jun17 vs. YE Jun16*	*% change YE Jun17 vs. YE Jun09*
Private vehicle or company car	4,646	5,554	5,775	5,884	5,024	5,465	5,830	6,300	6,349	*0.8%*	*36.6%*
n/p	-	-	-	-	-	-	-	-	-	-	-
n/p	-	-	-	-	-	-	-	-	-	-	-

n/p = not publishable

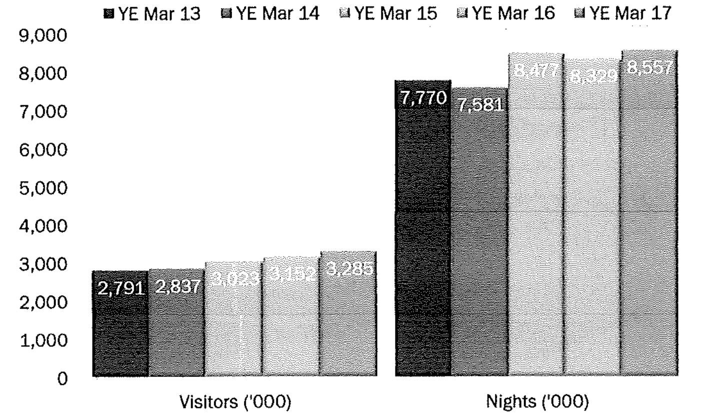
The Hunter includes: Barrington Tops, Hunter Valley, Lake Macquarie, Newcastle and Singleton.

*The expenditure estimates are derived based on information from Tourism Research Australia's modelled visitor expenditure in Australia's tourism regions.

^Includes: Medical reasons, to renew visa & to explore possibility of immigration.

Domestic Overnight Travel[1]

Visitors and nights



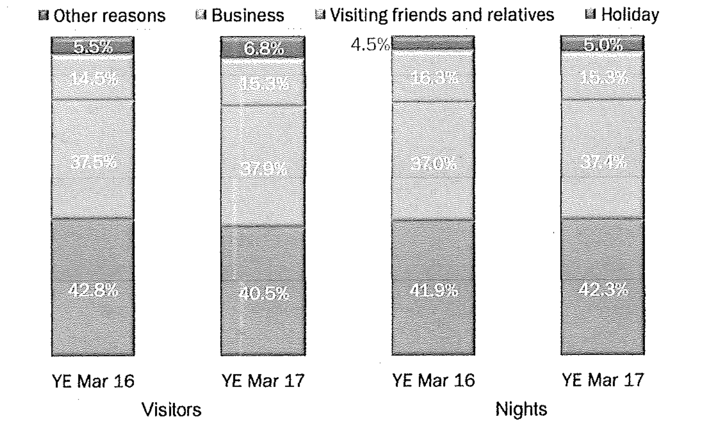
The Hunter received nearly 3.3 million domestic overnight visitors - up by 4.2% on YE Mar 16. Visitors spent nearly 8.6 million nights in the region – up by 2.7% on YE Mar 16.

Note: The number of domestic overnight trips to regional New South Wales increased by 2.3 percent on last year and by 15.7 percent* compared to four years ago.

Market share

The region received 15.8% of visitors and 12.1% of nights in regional NSW. Compared to YE Mar 16, the share of visitors was up by 0.3% pts and the share of nights was down by 0.2% pts.

Purpose of visit to The Hunter



'Holiday' (40.5%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives (VFR)' (37.9%) and 'business' (15.3%). Compared to YE Mar 16, visitors who travelled for 'holiday' declined by 1.5% while 'VFR' grew by 5.3% and 'business' increased by 10.1%.

'Holiday' (42.3%) was the largest purpose in terms of nights in the region, followed by 'VFR' (37.4%) and 'business' (15.3%). Compared to YE Mar 16, nights spent for 'holiday' grew by 3.6% and 'VFR' increased by 3.6% while 'business' declined by 3.9%.

Accommodation in The Hunter

'Friends or relatives property' (40.6%) was the most popular accommodation used for nights in the region. 'Standard hotel or motor inn, below 4 star' (11.8%) was the 2nd most popular accommodation used, followed by 'luxury hotel or resort, 4 or 5 star' (10.4%).

Origin

	Share of visitors		Share of nights	
Origin	YE Mar 16	YE Mar 17	YE Mar 16	YE Mar 17
Regional NSW	39.9%	38.5%	38.6%	35.6%
Sydney	43.7%	45.6%	40.3%	39.6%
Total intrastate	83.5%	84.1%	78.9%	75.2%
Queensland	7.0%	7.3%	10.0%	10.6%
Victoria	4.6%	5.1%	5.6%	8.4%
South Australia	0.5%	1.4%	0.6%	2.5%
Other interstate	4.3%	2.1%	4.8%	3.4%
Total interstate	16.5%	15.9%	21.1%	24.8%

Sydney (45.6%) was the largest source of visitors to the region, followed by regional NSW (38.5%) and Queensland (7.3%). Compared to YE Mar 16, the Sydney source market grew by 8.8% and regional NSW increased by 0.7%. Over the same period, Queensland grew by 8.6% and Victoria increased by 15.7% while South Australia grew by 182%*.

Sydney (39.6%) was the largest source market in terms of nights in the region, followed by regional NSW (35.6%) and Queensland (10.6%). Compared to YE Mar 16, nights spent by visitors from Sydney grew by 0.9% while nights from regional NSW declined by 5.4%. Over the same period, nights by Queenslanders grew by 8.6% and Victorian nights increased by 54.9%* while nights by South Australians grew by 305%*.

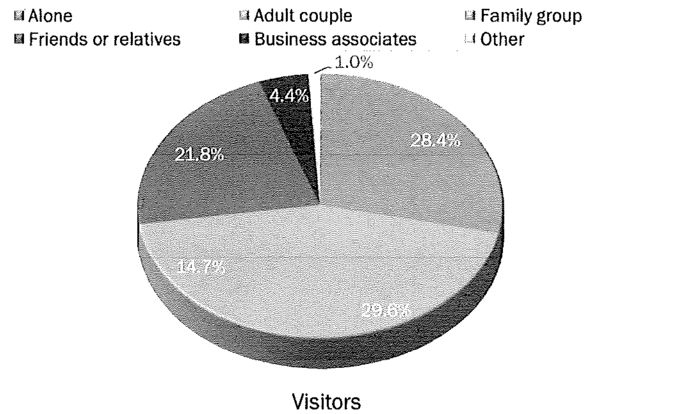
Top activities in The Hunter

'Eat out, dine at a restaurant or cafe' (60.3%) was the most popular activity undertaken by visitors to the region. 'Visit friends and relatives' (45.3%) was the 2nd most popular, followed by 'sightseeing or looking around' (23.9%).

Age groups

'15 to 29 years' (22.4%) was the largest age group of visitors to the region, followed by '50 to 59 years' (18.8%) and '30 to 39 years' (17.9%).

Travel party



'Adult couple' (29.6%) was the most common travel party amongst visitors to the region, followed by 'alone' (28.4%) and 'friends or relatives' (21.8%).

Expenditure (incl airfares and transport costs)[3]

Domestic overnight visitors spent over $1.4 billion in the region - down by 7.1% on YE Mar 16. On average, they spent $165 per night - down by 9.6% on YE Mar 16.

(3) Source: TRA's expenditure allocation method applied to NVS data, YE Mar 17.

The Hunter includes Barrington Tops, Cessnock, Gloucester, Hunter Valley, Lake Macquarie, Muswellbrook, Newcastle, Pokolbin, Port Stephens and Singleton.

* The percentage change is statistically significant. np = Not published due to insufficient sample.

Travel to The Hunter

Year ended March 2017

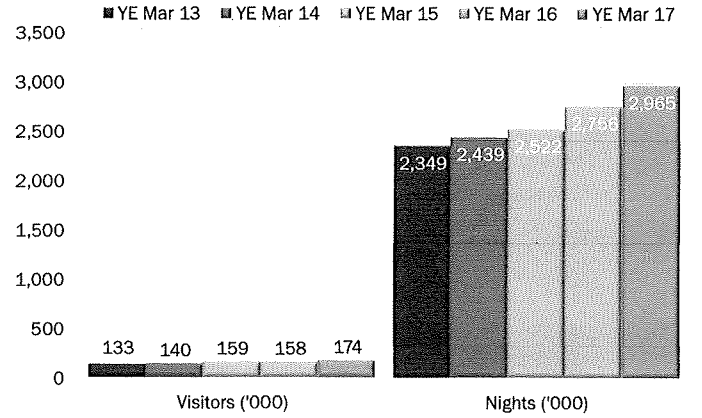
For the period of April 2016 to March 2017

Sources: (1) NVS & (2) IVS, YE Mar 17, TRA - unless otherwise specified.

	YE Mar 17	YE on YE growth	Share of region international overnight	Share of region domestic overnight	Share of region domestic daytrips	Share of regional NSW	Rank in regional NSW
Total visitors (million)	10.2	4.4%	1.7%	32.3%	65.9%	17.5%	2
Total nights (million)	11.5	3.9%	25.7%	74.3%	0.0%	13.6%	3
Total spend (billion)	$2.3	-3.2%	8.4%	60.8%	30.8%	15.6%	3

International Overnight Travel[2]

Visitors and nights



The Hunter received 174,200 international overnight visitors - up by 10.3%* on YE Mar 16. Visitors spent nearly 3.0 million nights in the region - up by 7.6% on YE Mar 16.

Note: The number of overnight trips to regional New South Wales by international visitors increased by 9.6 percent* on last year and by 34.3 percent* compared to four years ago.

Market share

The region received 22.3% of visitors and 20.9% of nights in regional NSW. Compared to YE Mar 16, the share of visitors was up by 0.1% pt and the share of nights was up by 0.8% pts.

Purpose of visit to The Hunter

'Holiday' (59.5%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives (VFR)' (27.5%) and 'business' (7.0%). Compared to YE Mar 16, visitors who travelled for 'holiday' grew by 18.3%* and 'VFR' increased by 9.5% while 'business' declined by 3.2%.

Origin – share of visitors to The Hunter

Share of international visitors to The Hunter						
Rank	Individual market	YE Mar 16	YE Mar 17	Origin region	YE Mar 16	YE Mar 17
1	United Kingdom	21.4%	15.6%	Europe	45.5%	41.6%
2	USA	11.3%	11.6%	North America	14.6%	16.1%
3	New Zealand	11.3%	9.1%	Asia	23.2%	28.3%
4	Germany	7.6%	8.5%	New Zealand & Oceania	13.3%	10.3%
5	Mainland China	5.5%	7.3%	Other Countries	3.4%	3.7%

The United Kingdom (15.6%) was the region's largest individual source market of visitors, followed by the USA (11.6%) and New Zealand (9.1%).

Accommodation in The Hunter

'Friends or relatives property' (37.1%) was the most popular form of accommodation used for nights in the region, followed by 'rented house, apartment, flat or unit' (32.0%).

Age groups

'15 to 29 years' (37.6%) was the largest age group of visitors to the region, followed by '30 to 39 years' (17.6%) and '60 to 69 years' (16.7%).

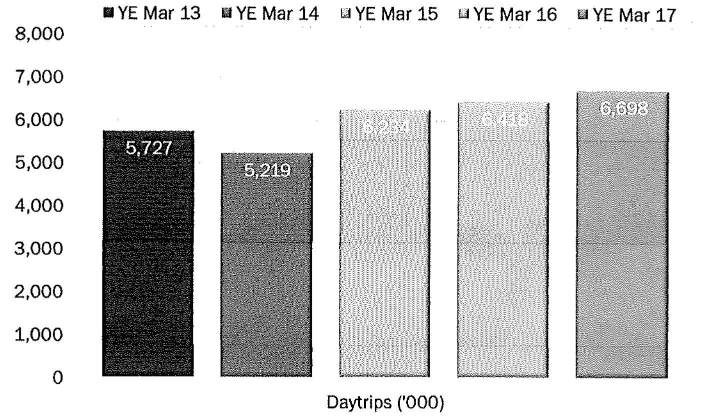
Expenditure (incl 30% prepaid package expenditure)[4]

International overnight visitors spent $195 million in the region – up by 3.0% on YE Mar 16. On average, they spent $66 per night – down by 4.3% on YE Mar 16.

(4) Source: TRA's expenditure allocation method applied to IVS data, YE Mar 17.

Domestic Daytrip Travel[1]

Daytrips



The Hunter received almost 6.7 million domestic daytrip visitors – up 4.4% on YE Mar 16.

Note: The number of domestic daytrips to regional New South Wales increased by 2.3 percent on last year and by 8.4 percent* compared to four years ago.

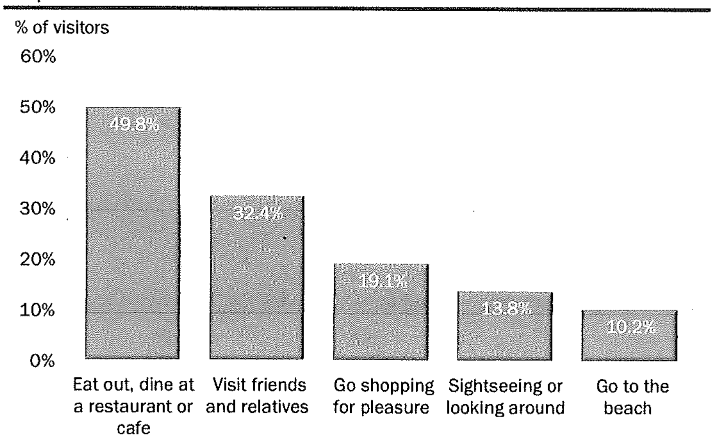
Market share

The region received 18.4% of daytrips to regional NSW. Compared to YE Mar 16, the share was up by 0.4% pts.

Main purpose of trip

'Holiday' (46.4%) was the largest purpose of trip for visitors to the region, followed by 'visiting friends and relatives (VFR)' (28.6%) and 'business' (11.6%). Compared to YE Mar 16, visitors who travelled for 'holiday' grew by 8.6% and 'VFR' increased by 2.9% while 'business' declined by 4.4%.

Top activities in The Hunter



'Eat out, dine at a restaurant or cafe' (49.8%) was the most popular activity undertaken by visitors to the region.

Expenditure[3]

Domestic daytrip visitors spent $713 million in the region - up by 3.8% on YE Mar 16. On average, they spent $107 per trip - down by 0.6% on YE Mar 16.

(3) Source: TRA's expenditure allocation method applied to NVS data, YE Mar 17.

Further information

Please see www.destinationnsw.com.au for profiles on travel to the other regions in NSW and information on international and domestic travel to the State.

Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant. np = Not published due to insufficient sample.

Hunter Tourism Satellite Account

2015-16

In 2015-16, the tourism industry contributed an estimated $1.8 billion to the Hunter regional economy (4.5% of Hunter's gross regional product) and directly employed approximately 12,200 people (3.8% of Hunter's regional employment).

Tourism Satellite Accounts (TSA) evaluate tourism industry activity and performance within a national accounting framework. The regional TSA measures both the direct and indirect impacts of tourism on the economy and includes metrics such as Gross Value Added (GVA), Gross Regional Product (GRP) and employment. It also provides information about tourism consumption, output, taxation and the composition of the tourism industry and its interaction with other industries.

This Hunter regional profile measures the economic contribution of tourism to the region both in absolute level terms and as a contribution to the regional economy. These measures are directly comparable to State, National, and indeed, international Tourism Satellite Accounts.

Key aggregates

In 2015-16, the tourism activity in the Hunter (Table 1.1) generated:

Tourism output

- $1.7 billion and $1.8 billion in direct and indirect tourism output, and $3.5 billion in total tourism output.

Gross Value Added (GVA)

- $890 million and $767 million in direct and indirect tourism GVA, and $1.7 billion in total tourism GVA.

Gross Regional Product (GRP)

- $967 million and $880 million in direct and indirect tourism GRP, and $1.8 billion in total tourism GRP; and

Employment

- 12,200 jobs for people employed directly by the tourism industry, 5,300 indirect jobs and a total employment impact of 17,500 people.

Table 1.1: Key tourism aggregates, Hunter, 2015-16 ($ million)

Visitor segment	Consumption	Output	GVA	GRP	Employed ('000)
Day-trippers	827	331	174	178	
Intrastate	1,686	706	368	405	
Interstate	323	284	153	180	
International	230	333	196	204	
Direct	**3,066**	**1,654**	**890**	**967**	**12.2**
Indirect*		**1,840**	**767**	**880**	**5.3**
Total impact		**3,494**	**1,657**	**1,847**	**17.5**
Total Hunter economy			**38,181**	**41,320**	**319.7**

Source: Deloitte Access Economics' Regional TSA model.

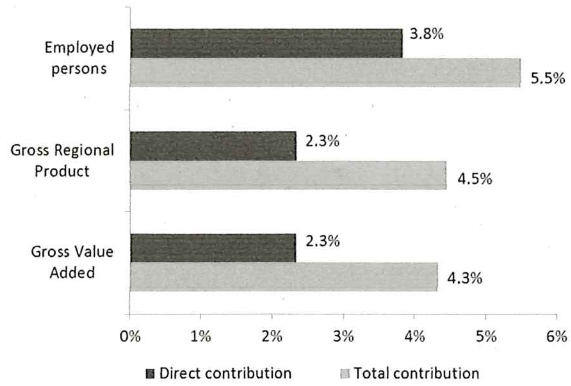
* Regional indirect contribution does not include regional contribution to the rest of Australia. Total indirect contribution in the State Tourism Satellite Account however includes contribution to the rest of Australia.

Economic importance of tourism to the Hunter

The ratio of Hunter's direct tourism contribution to Hunter's total regional economy provides a point of reference snapshot for the importance of tourism to the region. In 2015-16, it is estimated that tourism directly represented 2.3% (Chart 1.1) of the total Hunter economy (in GRP terms), compared to 4.0% for regional New South Wales.

The Hunter region has a strong tourism sector however it is also supported by a strong mining sector, and solid tertiary industry operations. The Hunter region represents about 5.9% of the state-wide direct contribution of tourism to GRP.

Chart 1.1: Tourism's contribution to the Hunter economy, 2015-16



Source: Deloitte Access Economics' Regional TSA model.

Consumption

In 2015-16, tourism consumption in Hunter was $3.1 billion, or 8.0% of total tourism consumption in New South Wales. Hunter makes up a bigger share of consumption at the state level for day-trippers (12.6%) and intrastate overnight visitors (14.4%).

In the year to 2015-16, Hunter tourism consumption grew by 0.4%. Since 2006-07, tourism consumption in Hunter has increased by 39%, representing an average growth rate of 3.7% per annum.

Hunter's share of New South Wales tourism consumption has decreased over the last year, from 8.4% in 2014-15 to 8.0% in 2015-16.

At the industry level, the tourism products that contributed most to tourism consumption in Hunter in 2015-16 were: (1) $568 million on takeaway and restaurant meals; (2) $402 million on long distance passenger transportation; and (3) $370 million on shopping (Table 1.2). Total consumption of these products was $1.3 billion or 44% of all Hunter tourism consumption.

Table 1.2: Tourism consumption by product, Hunter, 2015-16

Tourism product	Consumption ($ million)	Share of total (%)
Takeaway and restaurant meals	568	18.5
Long distance passenger transportation	402	13.1
Shopping (including gifts and souvenirs)	370	12.1
Fuel (petrol, diesel)	351	11.4
Accommodation services	287	9.4
All other	1,088	35.5
Total - tourism	**3,066**	**100.0**

Source: Deloitte Access Economics' Regional TSA model.

The majority (55%) of visitor consumption in Hunter was contributed by intrastate overnight visitors ($1.7 billion). In relative terms, these visitors also spent the most per night, $249 on average (Table 1.3).

Table 1.3: Tourism activity summary, Hunter, 2015-16

Visitor segment	Nights ('000)	Nights (%)	Consumption ($ million)	Consumption (%)	$ per night
Day-trippers	6,582*	37.4	827	27.0	126**
Intrastate	6,772	38.5	1,686	55.0	249
Interstate	1,575	8.9	323	10.5	205
International	2,674	15.2	230	7.5	86

Source: Tourism Research Australia Visitor Surveys and Deloitte Access Economics' Regional TSA model.
* Relates to visitor numbers for day-trippers.
** Relates to $ spend per day-trip visitor.

Gross Value Added

In 2015-16, direct tourism GVA in Hunter was $890 million. In the year to 2015-16, Hunter direct GVA grew 3.2%. Since 2006-07, direct tourism GVA in Hunter has increased by 57%, representing an average rate of 5.1% per annum.

Hunter contributed 5.9% of the total New South Wales direct tourism GVA. Hunter's share of New South Wales direct tourism GVA has decreased over the last year, from 6.1% in 2014-15.

The tourism industries that generated the highest economic contribution to Hunter in 2015-16 (Table 1.4) were:

- Cafes, restaurants and takeaway food services with $165 million in direct GVA and $182 million in direct GRP;
- Other retail trade with $144 million in direct GVA and $149 million in direct GRP; and
- Accommodation with $117 million in direct GVA and $132 million in direct GRP.

Table 1.4: Direct tourism GVA and GRP by industry, Hunter, 2015-16

Tourism industry	Direct GVA ($ million)	Share of total (%)	Direct GRP ($ million)	GRP share (%)
Cafes, restaurants and takeaway food services	165	18.6	182	18.8
Other retail trade	144	16.2	149	15.5
Accommodation	117	13.2	132	13.6
Clubs, pubs, taverns and bars	82	9.2	87	9.0
Ownership of dwellings	79	8.9	86	8.9
All other	302	33.9	330	34.2
Total - tourism	**890**	**100.0**	**967**	**100.0**

Source: Deloitte Access Economics' Regional TSA model.

In 2015-16, Hunter direct tourism GVA accounted for 54% of total tourism GVA for the region, with total tourism GVA in Hunter being $1.7 billion. Hunter made up 6.0% of the New South Wales total tourism GVA.

Gross Regional Product

In 2015-16, tourism's direct contribution to Hunter's GRP was $967 million, equal to 2.3% of total regional GRP. In the year to 2015-16, direct tourism GRP in Hunter grew by 3.9%. Since 2006-07, direct tourism GRP in Hunter has increased by 55%, representing an average growth rate of 5.0% per annum.

Hunter's share of direct tourism GRP in New South Wales was 5.9% in 2015-16, decreasing from 6.1% in 2014-15.

In 2015-16, direct contribution to GRP of $967 million accounted for 52% of total tourism GRP in Hunter. The remaining $880 million came from indirect supply industry contributions to tourism GRP in Hunter.

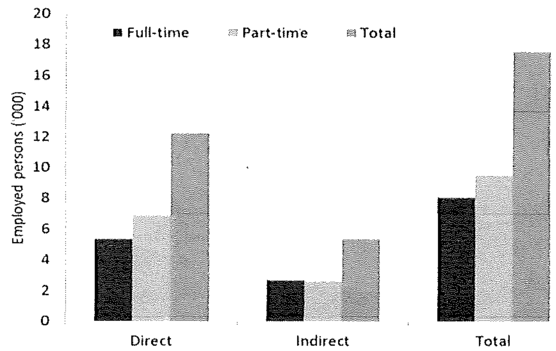
Tourism employment

TSAs define tourism employment as the number of tourism employed persons. In 2015-16 there were 12,200 persons (made up of 5,300 full-time and 6,900 part-time) directly employed in tourism in the Hunter (Chart 1.2).

In the year to 2015-16, direct tourism employment in Hunter decreased by 1.7%. Since 2006-07, direct tourism employment has grown by 8.6%, representing an average growth rate of 0.9% per annum.

Hunter's share of direct tourism employment was 7.5% of the New South Wales direct tourism employment in 2015-16, decreasing from 7.6% in 2014-15.

Chart 1.2: Contribution of tourism to employment, Hunter, 2015-16



Source: Deloitte Access Economics' Regional TSA model.

The tourism related industries that contributed most to regional tourism employment in Hunter in 2015-16 (Table 1.5) were:

- Cafes, restaurants and takeaway food services (1,310 full time and 3,010 part time employed persons);
- Retail trade (1,150 full time and 1,490 part time employed persons); and
- Accommodation (610 full time and 690 part time employed persons).

Table 1.5: Direct tourism employed persons, Hunter, 2015-16

Tourism industry	Jobs	Share (%)
Cafes, restaurants and takeaway food services	4,320	35.4
Retail trade	2,630	21.6
Accommodation	1,300	10.7
Clubs, pubs, taverns and bars	850	7.0
Education and training	660	5.4
Travel agency and tour operator services	660	5.4
All other industries	500	4.1
Other sports and recreation services	480	3.9
Road transport and transport equipment rental	410	3.4
Air, water and other transport	150	1.2
Rail transport	130	1.1
Cultural services	120	1.0
Casinos and other gambling services	10	0.1
Total	**12,200**	**100.0**

Source: Deloitte Access Economics' Regional TSA model.

In 2015-16, tourism's direct contribution to Hunter's employment, 12,200 jobs, accounted for 70% of total tourism employment in Hunter, and 1 in 26 jobs in the Hunter economy (Table 1.6).

The remaining 5,300 jobs represented tourism's indirect contribution to employment, 1 in 60 jobs in the Hunter economy.

Table 1.6: Tourism employment and job ratio, Hunter, 2015-16

Job type	Jobs ('000)	Share (%)	Job ratio
Direct	12.2	69.7	1 in 26 jobs
Indirect	5.3	30.3	1 in 60 jobs
Total	**17.5**	**100.0**	**1 in 18 jobs**

Source: Deloitte Access Economics' Regional TSA model.

Methodology

Destination New South Wales has worked with Deloitte Access Economics to produce consistent and comparable regional Tourism Satellite Account (TSA) estimates of the value of tourism to New South Wales's regions.

Tourism Satellite Accounts are used to estimate the contribution of tourism to a region by combining the contributions of the various goods and services that make up the industry. The regional, state and national estimates are based on an internationally recognised and standardised framework (although regional TSA methodology has been extended to determine the indirect impact of cross region trade flows).

There are a number of steps required to calculate the tourism industry's contribution to the Hunter economy. To start, a regional tourism consumption bundle is derived from TRA visitor survey data and adjusted to remove any price effects that are not directly attributed to the seller of the good or service (e.g. taxes, transport margins, pre-manufactured inputs etc.). The direct and indirect contributions of tourism are estimated by using regional input-output multiplier tables, derived from ABS data.

For consistency and assurance, the regional results are calibrated against the reported 2015-16 state TSA data.

Tourism Standard Reporting

For consistency in reporting, when referring to the overall size or contribution of the tourism industry in a region, the appropriate measure is GRP. GVA should be used when comparing the tourism industry against another industry within the same region.

Glossary

Direct contribution of tourism: The contribution generated by transactions between the visitor and producer for a good or service that involves a direct physical or economic relationship.

Indirect contribution of tourism: The subsequent flow-on effects created by the requirement for inputs from those industries supplying goods and services to visitors. For example, in the case of the hotel industry this might include the fresh produce supplied to a hotel and the electricity used.

Input-output table: An input-output table is a means of presenting a detailed analysis of the process of production and the associated use of goods and services and income generated. National input-output tables are produced annually by the Australian Bureau of Statistics.

Tourism gross regional product: Tourism GRP is tourism GVA plus net taxes on products that are attributable to the tourism industry. As such direct tourism GRP will generally have a higher value than direct tourism GVA. Direct tourism GRP is a satellite account construct to enable a direct comparison with the most widely recognised national accounting aggregate, gross domestic (or regional) product.

Tourism gross value added: Considered the most accurate measure of the contribution of the industry to the economy. It includes the total labour income and capital revenue received by the industry and the net taxes that government received from the production. This measure is directly comparable with the value added of 'conventional' industries such as mining and manufacturing and can also be used for comparisons across countries.

Tourism output: The total value of goods and services produced in Australia to satisfy visitor consumption. It is measured in basic prices, so it excludes net taxes on tourism products.

Walkin enquiry stats

Financial year stats 2014 - 2015

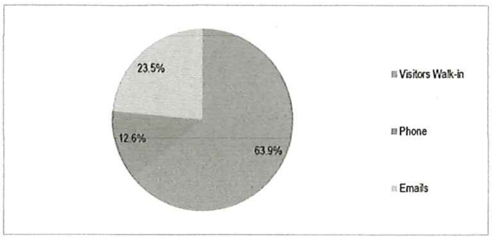
July 01st 2014 to June 30th 2015

Visitor Enquiries

Visitors Walk-in		15984	63.9%
Phone		3145	12.6%
Emails		5871	23.5%
	Total	25000	100.0%

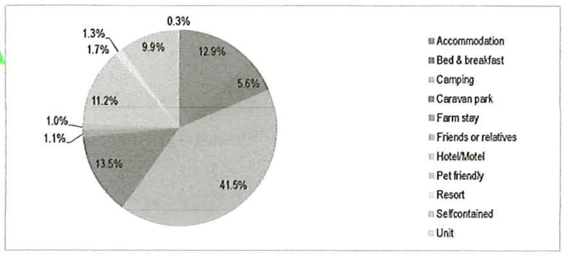
Data for 363 days

Daily average visitors	44.03
Daily average phone calls	8.66
Daily average emails	17.63
Total enquiries for year	25000.00
Daily enquiries average for month	68.87



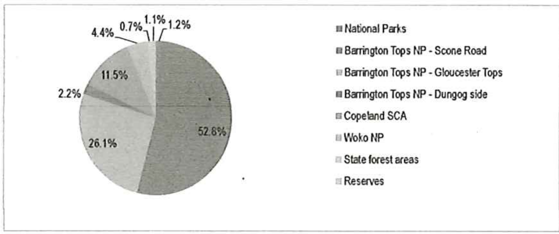
Accommodation

Accommodation		250	12.9%
Bed & breakfast		108	5.6%
Camping		802	41.5%
Caravan park		260	13.5%
Farm stay		22	1.1%
Friends or relatives		20	1.0%
Hotel/Motel		217	11.2%
Pet friendly		32	1.7%
Resort		25	1.3%
Selfcontained		192	9.9%
Unit		5	0.3%
	Total	1933	100.0%



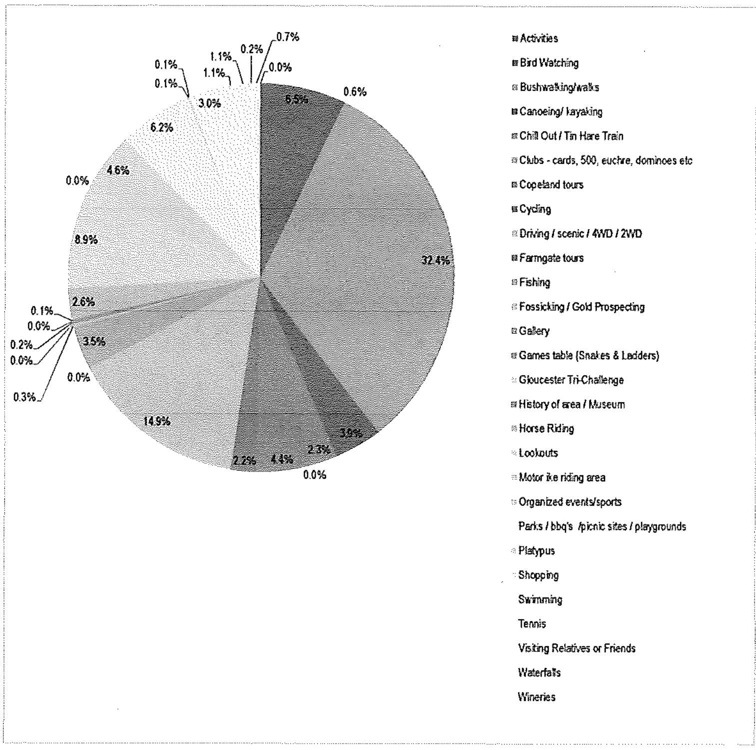
National Parks

National Parks		59	1.2%
Barrington Tops NP - Scone Road		2584	52.8%
Barrington Tops NP - Gloucester Tops		1278	26.1%
Barrington Tops NP - Dungog side		107	2.2%
Copeland SCA		564	11.5%
Woko NP		214	4.4%
State forest areas		34	0.7%
Reserves		55	1.1%
	Total	4895	100.0%



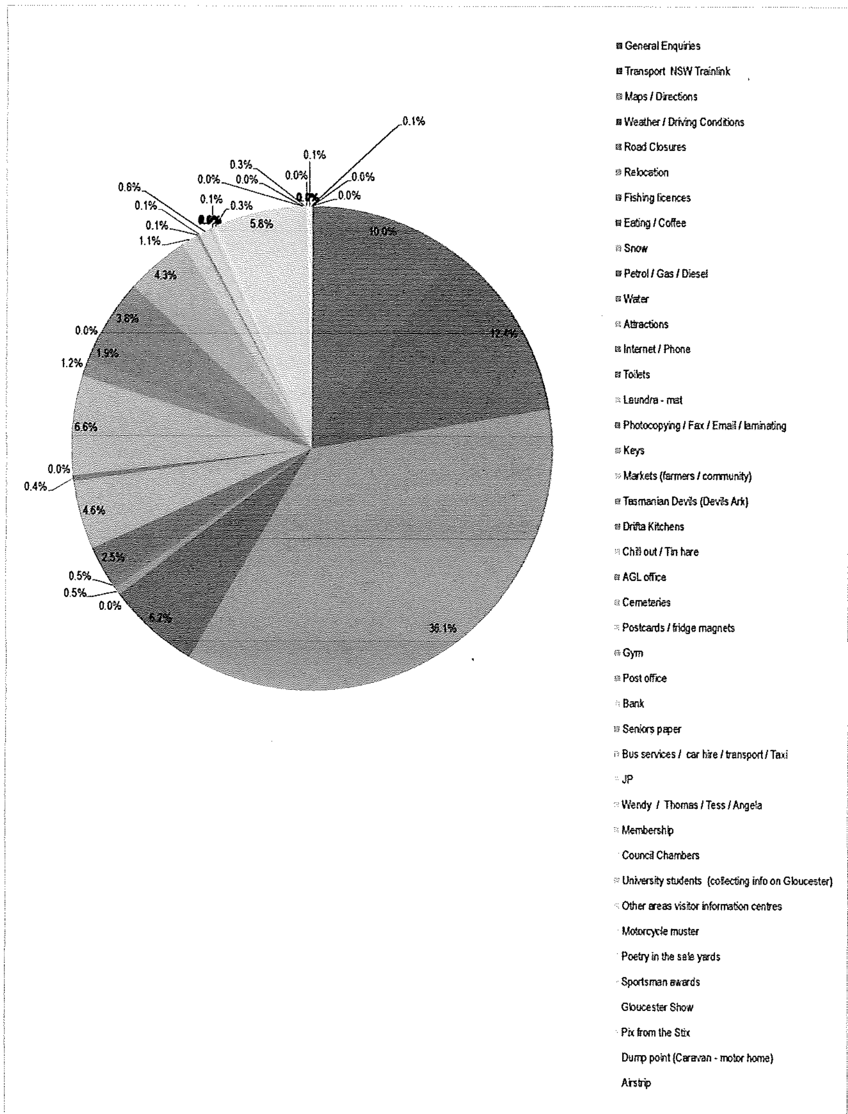
Activities

Activities	300	6.5%
Bird Watching	29	0.6%
Bushwalking/walks	1493	32.4%
Canoeing/ kayaking	180	3.9%
Chill Out / Tin Hare Train	106	2.3%
Clubs - cards, 500, euchre, dominoes etc		
Copeland tours	204	4.4%
Cycling	101	2.2%
Driving / scenic / 4WD / 2WD	685	14.9%
Farmgate tours	1	
Fishing	161	3.5%
Fossicking / Gold Prospecting	12	0.3%
Gallery	2	0.0%
Games table (Snakes & Ladders)	9	0.2%
Gloucester Tri-Challenge		
History of area / Museum	6	0.1%
Horse Riding	121	2.6%
Lookouts	409	8.9%
Motor ike riding area	2	0.0%
Organized events/sports	213	4.6%
Parks / bbq's /picnic sites / playgrounds	284	6.2%
Platypus	4	0.1%
Shopping	4	0.1%
Swimming	136	3.0%
Tennis	50	1.1%
Visiting Relatives or Friends	49	1.1%
Waterfalls	10	0.2%
Wineries	32	0.7%
Total	4603	99.9%



General Enquiries

General Enquiries		1386	10.0%
Transport NSW Trainlink		1711	12.4%
Maps / Directions		5000	36.1%
Weather / Driving Conditions		863	6.2%
Road Closures			
Relocation		72	0.5%
Fishing licences		68	0.5%
Eating / Coffee		351	2.5%
	Snow	637	4.6%
Petrol / Gas / Diesel		53	0.4%
Water		2	0.0%
Attractions		917	6.6%
Internet / Phone		160	1.2%
Toilets		259	1.9%
Laundra - mat		1	0.0%
Photocopying / Fax / Email / laminating		526	3.8%
Keys		594	4.3%
Markets (farmers / community)		147	1.1%
Tasmanian Devils (Devils Ark)		17	0.1%
Drifta Kitchens		12	0.1%
Chill out / Tin hare		110	0.8%
AGL office		1	0.0%
Cemeteries		1	0.0%
Postcards / fridge magnets		9	0.1%
Gym		1	0.0%
Post office		2	0.0%
Bank		4	0.0%
Seniors paper			
Bus services / car hire / transport / Taxi		15	0.1%
JP		39	0.4%
Wendy / Thomas / Tess / Angela		804	5.8%
Membership		1	0.0%
Council Chambers		1	0.0%
University students (collecting info on Gloucester)		37	0.3%
Other areas visitor information centres			
Motorcycle muster		10	0.0%
Poetry in the sale yards		5	0.0%
Sportsman awards		4	0.0%
Gloucester Show		15	0.1%
Pix from the Stix		17	0.1%
Dump point (Caravan - motor home)		1	0.0%
Airstrip			
	Total	13853	100.0%



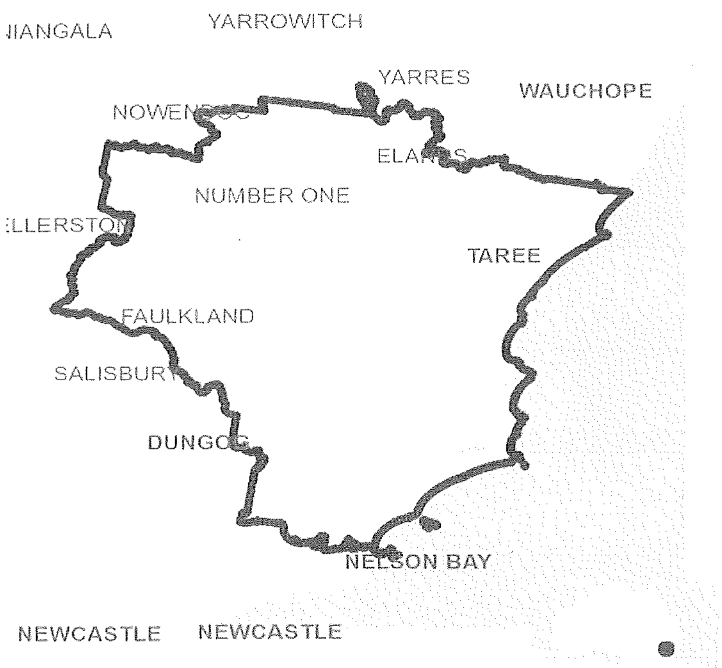
Australian Government
Austrade

TOURISM
RESEARCH
AUSTRALIA

LOCAL GOVERNMENT AREA PROFILES, 2016*

MID-COAST (A), NEW SOUTH WALES

AREA POPULATION^: 91,648



TOURISM BUSINESSES^	TOTAL
Non-employing	340
1 to 4 employees	312
5 to 19 employees	199
20 or more employees	42
Total	**897**

TOP INTERNATIONAL MARKETS

COUNTRY OF RESIDENCE	VISITORS ('000)	NIGHTS ('000)
United Kingdom	5	34
United States of America	3	15
New Zealand	2	27

KEY TOURISM METRICS FOR MID-COAST (A)

	INTERNATIONAL	DOMESTIC OVERNIGHT	DOMESTIC DAY	TOTAL
Visitors ('000)	21	1,013	933	1,966
Nights ('000)	165	3,414	-	3,579
Average stay (nights)	8	3	-	3
Spend ($m)	7	409	89	504
Average spend per trip ($)	319	404	95	256
Average spend per night ($)	41	120	-	116
Average spend (commercial accommodation) per night ($)	57	153	-	150

TOURISM STATISTICS FOR MID-COAST (A)

VISITORS TO MID-COAST (A)	INTERNATIONAL	DOMESTIC OVERNIGHT	DOMESTIC DAY	TOTAL
Reason (visitors '000)				
Holiday	15	595	469	1,078
Visiting friends or relatives	5	297	269	572
Business	np	73	np	np
Other	np	29	117	np
Travel party type (visitors '000)				
Unaccompanied	11	157	-	168
Couple	6	322	-	328
Family group	np	260	-	np
Friends/relatives travelling together	2	232	-	234
Accommodation (nights '000)				
Hotel or similar	12	395	-	406
Home of friend or relative	93	992	-	1,085
Commercial camping/caravan park	8	800	-	808
Backpacker	np	np	-	np
Other	50	1,224	-	1,274

KEY TOURISM METRICS FOR TOTAL AUSTRALIA, 2016^

	International		Domestic overnight		Domestic day		Total	
Visitors ('000)		7,625		90,742		189,583		287,950
Percentage change	11	11	4	4	4	4	4	4
Nights ('000)		252,969		334,798		-		587,767
Percentage change	2	2	5	5		-	4	4
Average stay (nights)		33		4		-		6
Percentage change	-8	-8	2	2		-	0	0
Spend ($m)		39,085		60,981		19,763		119,830
Percentage change	7	7	6	6	7	7	6	6

KEY TOURISM METRICS FOR NEW SOUTH WALES, 2016^

	International		Domestic overnight		Domestic day		Total	
Visitors ('000)		3,872		29,188		57,571		90,631
Percentage change	13	13	5	5	6	6	6	6
Nights ('000)		87,533		95,183		-		182,716
Percentage change	2	2	6	6		-	4	4
Average stay (nights)		23		3		-		6
Percentage change	-10	-10	1	1		-	-2	-2
Spend ($m)		9,520		16,701		6,019		32,240
Percentage change	13	13	6	6	6	6	8	8

* Data is based on a four year average from 2013 to 2016
'np' = the estimate is unreliable and cannot be published '-' = not available
^ Data for 2016.
Note: Data may not match totals due to rounding. For the purposes of confidentiality, Tourism Businesses data has been perturbed, therefore data may not match totals.
Sources:
Regional Population Growth - cat. no. 3218.0, ABS
Counts of Australian Businesses - cat. no. 8165.0, ABS
International Visitor Survey, Tourism Research Australia
National Visitor Survey, Tourism Research Australia

TRA.GOV.AU

GLOUCESTER Local Government Area
Tourist Accommodation Profile

Destination NSW

This profile provides a summary of published data and information on tourist accommodation in this Local Government Area (LGA).

SUMMARY OF HOTELS/MOTELS/SERVICED APARTMENTS WITH 15 OR MORE ROOMS	Gloucester	Hunter (TR)*	New South Wales
Number of establishments (at September 30, 2011)	2	99	1,398
Number of rooms (at September 30, 2011)	n/a	4,354	70,459
Room occupancy rate (average over 12 months ending Sept 30, 2011)	n/a	59.1%	65.9%
Room rate (average cost of rooms occupied) (average over 12 months ending September 30, 2011)	n/a	$149	$161

SUMMARY OF CARAVAN PARKS	Gloucester	Hunter (TR)*	New South Wales
Number of establishments (at June 30 2010)	2	24	501
Number of on-site vans (at June 30 2010)	n/a	316	7,717
Number of cabins/flats/units/villas (at June 30 2010)	n/a	801	13,228
Total capacity (including other sites) (at June 30 2010)	n/a	3,079	74,868
Site occupancy rate (average over 12 months ending June 2010)	n/a	69.4%	59.3%

SUMMARY OF RENTED HOLIDAY HOMES/UNITS	Gloucester	Hunter (TR)*	New South Wales
Number (at June 30 2010)	n/a	n/a	9,118
Unit occupancy rate (average over 12 months ending June 2010)	n/a	n/a	34.9%

SUMMARY OF VISITOR HOSTELS	Gloucester	Hunter (TR)*	New South Wales
Number of establishments (at June 30 2010)	n/a	4	94
Bed Occupancy rate (average over 12 months ending June 2010)	n/a	48.2%	57.5%

Further information on the number and type of visitors is available on a separate product (see www.destinationnsw.com.au/LocalAreaProfiles)

* TR = Tourism Region.

Source: Australian Bureau of Statistics, Survey of Tourist Accommodation

Notes: Most recent available data is used in this summary as noted for each item above.

ABS ceased collecting information on hotels with less than 15 rooms, caravan parks, holiday homes/units and visitor hostels in June 2010 but it is expected that a private company, STR Global will commence collecting equivalent data for hotels with less than 15 rooms, caravan parks and visitor hostels in 2012, to be published through Tourism Research Australia.

The mapped location of the LGA (as well as data for previous years on accommodation establishments) is available in the "LGA Profile" from the ABS (See: http://www.ausstats.abs.gov.au/ausstats/nrpmaps.nsf/NEW+GmapPages/national+regional+profile?opendocument and click on "Local Government Area", "NSW Get Data" and the "+" sign for a clickable list of all LGAs in NSW).