

QUEANBEYAN-PALERANG REGIONAL COUNCIL

TOURISM PLAN 2017–2025:

Supporting the Visitor Economy

CONSUMER RESEARCH & TRENDS ANALYSIS REPORT



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INTRODUCTION

Tourism to the Queanbeyan-Palerang Regional Council (QPRC) Region and the broader Canberra Tablelands region is showing moderate, steady growth. In recent years the Canberra Tablelands tourism sector has been boosted in-part due to improvements made to infrastructure, access and new tourism product offerings. However, at the Queanbeyan-Palerang level, the local tourism potential is constrained by the immaturity of Palerang as a destination – its attractions, activities, choice and distribution of accommodation, and the lack of cohesion and promotion across the shire.¹²

To ensure QPRC's tourism opportunities are given every opportunity to be realised, a Tourism Plan is required. This plan needs to support the commitment to the Canberra Region Joint Organisations (CBRJO) wider coordinated tourism planning efforts, the Canberra Region Tablelands and the promotion of economic development through tourism for the region.

This section aims to provide insights to the opportunities and threats to the growth of the tourism industry in Queanbeyan-Palerang Region through analysis of available secondary research including global tourism trends and tourism industry insights.

NOTE: It is important to note that there have been many changes over recent years to the boundaries of LGAs and regions, as well as the economic development and tourism agencies that represent these regions. These changes are summarised in the following section. Due to these changes, there is a lack of up to date research information pertaining to the newly formed regional boundaries, particularly at the Queanbeyan-Palerang level. As such, a combination of existing research across former regions is being examined to draw insights across the region.

Overview of Queanbeyan-Palerang within the regional tourism context – Changing regional boundaries

In recent times, the following organisations have been created which include Queanbeyan-Palerang Regional Council (QPRC):

Canberra Region Joint Organisation (CBRJO).

- Representing the Canberra Region
- The directive of the CBRJO is to be a strong cohesive voice for the region that facilitates opportunities and partnerships to create sustainable vibrant communities.
 - Coordinated tourism planning for the region
 - Promotion of economic development through tourism for the region.
- It has joined with the ACT Government supporting the CBR brand comprising the destination elements of:
 - Alpine: Snowy Mountains region
 - Coast: Eurobodalla and the Sapphire Coast tourist regions
 - City: Canberra and Queanbeyan
 - Tablelands: incorporating five LGAs –Queanbeyan-Palerang, Yass Valley, Hilltops, Goulburn-Mulwaree and Upper Lachlan

Destination Southern NSW Destination Network (DN)

- The role of the DNs is to facilitate visitor economy growth at the local level, through representing and co-ordinating the region's tourism industry. DNs will predominantly be destination managers¹⁴. Their core responsibilities will be:
 - Industry Engagement and Industry Development
 - Product Development
 - Training and Education
 - Preliminary Review of Local RVEF (Regional Visitor Economy Fund) Applications to ensure quality/compliance with guidelines.
 - Collaboration with DNSW on industry activities.

It is also worth noting the newly formed LGAs in the region as a result of State wide council reform in 2016:

- Queanbeyan-Palerang Regional Council – amalgamation of former Queanbeyan and Palerang LGAs
- Hilltops Council – amalgamation of former Young, Harden and Boorowa
- Snowy Monaro Council – amalgamation of former Snowy River, Cooma-Monaro and Bombala LGAs

There are a range of planning and research documents available which have been created both for the newly formed regions and some of the pre-existing regions. The following table identifies the regions referred to throughout this document.

Region	Regional Borders	Representative Organisations	Documents
Queanbeyan-Palerang Region	Queanbeyan-Palerang Regional Council border	Queanbeyan-Palerang Regional Council (QPRC)	<ul style="list-style-type: none"> – Queanbeyan-Palerang Data Master 8.0 June 2016 (Peter Valerio) – Queanbeyan-Palerang Regional Data, June 2016 (Peter Valerio)
Canberra Region Tablelands	Composed of 8 LGAs Bega Valley, Eurobodalla, Hilltops, Goulburn-Mulwaree, Queanbeyan-Palerang, Snowy Monaro, Upper Lachlan and Yass Valley. Collectively with the ACT Government	<ul style="list-style-type: none"> – Canberra Region Joint Organisation (CBRJO) – Destination Southern NSW Destination Network 	<ul style="list-style-type: none"> – Canberra Region-Tablelands Tourism Monitor, June 2016 (Peter Valerio)
The Southern Inland region (SIR) <i>(Essentially the Canberra Region excluding ACT, Bega and Eurobodalla)</i>	Composed of 13 LGAs: Bombala, Boorowa, Cooma-Monaro, Goulburn-Mulwaree, Harden, Palerang, Queanbeyan, Snowy River, Tumut, Upper Lachlan, Wingecarribee, Yass valley and Young.	<ul style="list-style-type: none"> – Regional Development Australia (RDA) 	<ul style="list-style-type: none"> – RDA Southern Inland Regional Plan 2013–2016 (RDA)
The South East and Tablelands region	Composed of 14 LGAs extending from the Southern Highlands and Tablelands to the Victorian border, surrounding the Australian Capital Territory (ACT), and incorporating the Snowy Mountains and South Coast.		<ul style="list-style-type: none"> – Draft South East and Tablelands Regional Plan, 2016
ACT	ACT	ACT Tourism	<ul style="list-style-type: none"> – Tourism in the ACT factsheet – Visitation to the ACT factsheet

GLOBAL TRENDS IN TOURISM

Emerging Global Trends in Visitor Motivations and Behaviour

There are a number of relevant emerging trends in visitor motivations and behaviour that need to be considered when exploring long-term Tourism growth for the Queanbeyan-Palerang region.

Emerging Trends in Visitor Motivations and Behaviour

Source: The Association of Southeast Asian Nations. ASEAN Tourism Marketing Strategy (ATMS) 2012–2015.



It is not possible to analyse each of these 10 trends in detail, but a number of them have particular relevance to the Queanbeyan-Palerang region:

1. **Experiential Travel:** this is about both getting away from the traditional sites and experiencing 'travel we live' rather than 'travel we look at'. Interestingly it is also growing in popularity in emerging economies because of the greater benefits it has for a local population.
 - Visitors are increasingly seeking a personalized experience
 - Customers increasingly looking for a travel experience that allows them to experience a local's way of life resulting in an increasing adoption of the 'share economy' through platforms such as AirBnB, book a batch and Uber
 - In Australia, domestic travellers have a strong desire to do as the locals do and live the authentic experience, including on domestic overnight trips.⁸
2. **The Green Movement:** this growing trend continues to move towards the mainstream.
 - This has clear relevance for the Queanbeyan-Palerang region which offers many natural attractions and enjoys a 'clean air, no pollution' image.⁶
3. **Increasing Importance of Niche/ Interest/ Activity-based Tourism:** again, this trend is clearly relevant; as is the important role the Internet has played in making this type of more sophisticated segmentation profitable.
4. **The Demand for Public Programming:** festivals, cultural activities, sports events (e.g. local running races or surf competitions) and conferences are an increasing focus for tourist's travel patterns and motivations.
 - Young Australians are traveling domestically for special occasions; be it for sports events, music festivals or other personal occasions such as weddings. This is driving domestic travel.⁸
5. **Cities as Attractions:** In the first half of the 20th Century Queanbeyan played a critical role in the establishment of Australia's new capital city, Canberra. Queanbeyan was declared a city in 1972 and is now one of the fastest growing regional centres in NSW.¹³ Canberra now boasts many major attractions.

More detail on each of these trends, and their likely influence on Tourism, is available on pages 14–17 of the 'ASEAN Tourism Marketing Strategy (ATMS) 2012–2015' document available for download here: http://www.asean.org/?static_post=asean-tourism-marketing-strategy-2012-2015-2

Online Information and Bookings

There is a growing usage both globally and locally of the use of internet and mobile devices as a source of travel information and bookings.

- Travellers are demanding more information, control, interaction, and personalisation
- Smart technology (e.g., phones, bag tags, and cards) is:
 - creating new opportunities for innovative new services and processes
 - enabling faster decision-making by customers thereby increasing business to a destination
- More third-party information providers are aggregating content about destinations
- Peer-to-peer buyer influence driving customer purchases: 74% of travellers use social media while on holiday and 76% of travellers use social media to share their experiences after they return
 - In Australia, recommendations are vital but the mechanism varies: Younger Australians look to social media as their primary source of inspiration, where TripAdvisor is more relevant for other groups⁸

Expedia, Travel Decisions in a Multiscreen World 2014 | Key Findings

- Mobile device ownership continues to grow steadily –TODAY the mobile travel audience is BIGGER than the PC travel audience with engagement on mobile spanning all travel stages and categories of content
- While mobile bookings are at 6% of the market, over 70% of travellers are engaging with content via their mobile device on a monthly basis
- Mobile bookings will continue to grow –most who have booked on mobile will again, many who have yet to book on mobile intend to in the future
- Those who aren't booking are looking and you need to be where they are
- Consumer experience on mobile across stages has room to grow, ad relevancy and grabbing attention are key to driving mobile ad clicking

DNSW, Internet use by visitors to NSW 2014 | Key Findings

- For both domestic and international markets, holiday visitors to NSW were the biggest users of the Internet for sourcing information and for booking
- Increasingly, the internet is the most commonly used source of information used before the trip for both the international and domestic markets to NSW
- The domestic market has a high preference for pre-booking accommodation via the Internet; entertainment, activities and events were LESS likely to be pre-booked online perhaps reflecting the lower online presence of these businesses
- Domestic visitors to NSW aged between 30-44 years are the biggest users of the Internet; international visitors to NSW were aged 15-29 years
- The importance of travel agents has decreased

Insights – What it means for Queanbeyan-Palerang

The Queanbeyan-Palerang region has a lack of quality online information sources – including traditional destination websites and social media platforms. The LGA website (<http://www.palerang.nsw.gov.au/tourism>) only offers 4 suggestions for local tourism websites including:

- www.braidwoodnsw.com
- www.visitbraidwood.com.au
- www.captainsflat.org
- www.bungendore.com.au

Others include:

- <http://www.visitqueanbeyan.com.au/>

This gap should be addressed to ensure that all target markets are able to easily find information on and book the tourism experiences they are interested in.

There is also currently a gap in telecommunications service provision to local businesses in the region, and there is a clear need to make improvements in the region to infrastructure and service.¹²

These improvements will be critical for local tourism operators and regional marketing bodies in order to be able to effectively represent their tourism offering online to potential visitors.

Short Breaks

Short Breaks are a growing market in Australia – in the past decade, the short breaks market in NSW grew by 14%. Short breaks represent significant opportunity for destinations such as the Canberra region within a 3-hour drive of capital cities.

Destination NSW, Short Breaks to NSW March 2015 | Key Findings

- The annual study into the Australian travel mindset, Domesticate2 reported that short breaks are a vital component of a happy life, offering a chance to get away from city busyness and to refresh and relax.
- Domestic short breaks often a mix of planned and spontaneous trips, spread across the calendar to provide milestones to look forward to. Australians like to make short domestic trips often, even after returning from long-haul overseas trips.
- The short breaks market to Australia accounts for a quarter (25%) of total overnight visitors (domestic and international) to the country.
- Domestic visitors account for majority (98%) of the short breaks market while international visitor's market share is only 2%.

- In the past decade, the short breaks market in NSW grew by 14%.
- The largest proportion of short break visitors to NSW is youth segment (15 to 29 years); however, the number of visitors aged 60 years and over has seen the strongest (and continuous) growth over the past ten years.
- In YE September 2015, Regional NSW received three quarters (76%) of domestic short break visitors to NSW. Capital Country received only 4% of these visitors.
- Domestic travel is viewed as a great opportunity among all Australians (Domesticate TNS 2016).

Insights – What it means for Queanbeyan-Palerang

The Queanbeyan-Palerang is under-represented as a short break destination, particularly given the excellent access and transport options available. See the table below, at a regional level former Capital Country was only attracted 4% of domestic visitors in NSW. Marketing activities could be developed to target these potential visitors as well as some product development and packaging to present all inclusive short break options.

Destinations	Domestic Visitors (%)	International Visitors (%)
Sydney	24%	98%
Regional NSW	76%	4%
North Coast NSW	16%	*
South Coast	16%	*
Hunter	12%	*
Central NSW	6%	*
Central Coast	5%	*
Blue Mountains	5%	*
The Murray	4%	*
Snowy Mountains	4%	*
Capital Country	4%	*
New England North West	3%	*
Riverina	2%	*
Outback NSW	1%	*

*Data unavailable due to small sample size

Source: National and International Visitor Surveys, Year Ending September 2015.

Nature-based Tourism

Over the past two decades, both Nature and Adventure-based Tourism have developed to be part of the fastest-growing segments within the Tourism industry. Nature-based Tourism is often called out as the fastest growing Tourism segment globally, has inherently higher-value per visitor than more mainstream forms of Tourism, and is notably more resilient to the periodic downturns that impact Tourism due to economic, societal, health or environmental reasons.⁹

Nature and eco based accommodation in Australia

In the year ending June 2016, 68% (or 5.0 million) of international visitors engaged in some form of nature-based activity.¹⁵

In the last five years, there has been a rapid growth in the accommodation options available when it comes to Nature and Eco-focused offerings in Australia – driven both by the growth in Nature-based Tourism/ Ecotourism, but also by the increasing expectations of more mainstream Tourists' that accommodation providers will manage their environmental footprint as a base level of service. This is reflected in the development of certification schemes like Ecotourism Australia's 'Eco Certified Tourism' program and the wide range of specialised websites offering Eco accommodation options around the country.

There has also been an expansion in the type of offerings available, with the upper end showing particularly strong growth through the rise of options like 'Glamping' and the general move away from Eco accommodation being associated with more basic facilities and a lack of luxury

Nature-based Tourism in NSW

Factsheet – Nature-based Tourism to NSW Year ended December 2015, Destination NSW | Key Findings

- Nature-based travel is a strong and growing segment of the tourism industry in NSW. NSW received nearly 25.3million international and domestic nature-based visitors in the year ended December 2015 –up by 10.5%on YE Dec 14.
- Nature-based travellers represented 37.8% of visitors and 43.4% of nights by domestic overnight travellers to NSW.
- On average, Nature-based visitors spent \$743 per visitor and \$199 per night in NSW
- Source markets – NSW received 67.1% of domestic overnight nature-based visitors from intrastate and 32.9% from interstate. Sydney (35.3%) was the biggest source market, while Queensland (12.8%) was the biggest interstate market
- Domestic nature-based visitors stayed, on average, 3.7nights in NSW. This was longer than the average for all visitors to the State (3.2nights).
- Capital Country (58.6%) has a relatively low percentage of overnight domestic visitors who engaged in a nature-based activity.

Destinations in NSW

Region	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
Sydney	2,158	23.2%	7,700	31.1%	3.6
Blue Mountains	447	53.1%	1,090	54.1%	2.4
Capital Country	351	27.3%	1,038	35.4%	3.0
Central Coast	736	53.7%	2,486	59.5%	3.4
Central NSW	428	22.1%	1,303	25.7%	3.0
Hunter	1,158	37.6%	3,545	41.2%	3.1
New England North West	275	21.0%	1,038	24.0%	3.8
North Coast NSW	2,702	57.8%	11,368	64.6%	4.2
Outback NSW	84	22.8%	-	-	-
Riverina	93	10.4%	-	-	-
Snowy Mountains	310	41.7%	1,066	43.2%	3.4
South Coast	2,010	58.6%	7,610	62.2%	3.8
The Murray	208	18.9%	682	23.2%	3.3
Total	10,608	37.8%	39,560	43.4%	3.7
- = estimate considered statistically unreliable					

Outdoors Victoria study on nature-based outdoor activities – March 2016

Independent economic modelling shows that nature-based outdoor activities add \$6.2 billion per year to Victoria's economy, supporting 71,000 jobs, or 2% of Victoria's total workforce. These activities include nature-based tourism, camps and outdoor education, and a full range of outdoor recreational activities, such as fishing, four-wheel driving, bushwalking, canoeing, birdwatching, beach activities and many others. The analysis was commissioned by Sport and Recreation Victoria and Outdoors Victoria. The report's authors, Marsden Jacob Associates, note Victoria's nature based outdoors sector makes a significant contribution to the economy and individual wellbeing in Victoria. For the full report, see: <http://outdoorsvictoria.org.au/resources/economics-of-outdoors>

Tourism Research Australia Cycling Survey – December 2015 (Conducted in partnership with Tourism Victoria)

The aim of this survey was to gain a better understanding of the motivators for and barriers to bike tourism in Australia (and potential for growth in Victoria). More than 3,000 people participated in this survey, with 2,000 undertaking a detailed survey. About 400 people who had previously engaged in bike tourism were included in the respondents.

The survey reports that the cycle tourism market is relatively small in size, but those involved often take multiple trips each year, and are highly engaged. The report found that providing information such as downloadable maps and other online information, and websites to enable trip planning, were frequently mentioned ideas to help grow bike tourism.

Recreational cycling on day trips close to home was the single most common trip type (28%). About half of the survey participants had participated in three cycling events in the past year and more than half took trips which involved at least one overnight stay (68%).

Reasons identified in the survey for participating in bike riding on their last trip:

- Health and fitness (58%)
- Relaxation (42%)
- Enjoying the outdoors/open air (42%)
- Enjoying recreational cycling (42%)
- Sightseeing (40%)

Insights – What it means for Queanbeyan-Palerang

The natural environment and recreation areas in Queanbeyan-Palerang provide abundant opportunities for outdoor activities including horse-riding, bushwalking, camping, swimming and fishing. There are many facilities and opportunities for active recreation such as swimming pools, horse-riding, dog off-leash areas, cycle ways, greenways, walking trails, skate parks, exercise centres, golf courses and tennis courts.¹²

Domestic visitors to the region also rate 'Bushwalking or Rainforest walks' in the top 5 activities for in the region. There is an opportunity for Queanbeyan-Palerang to further develop nature-related tourism product offerings as well as design marketing specifically targeting nature based travellers.

Women's Market

There have been some interesting recent shifts globally with regards the overall Womens market, and particularly regarding the Health and Wellbeing/ Guided Walk/ Adventure Tourism areas; these niche areas have started to become more apparent in Australia in the last 18–24 months.⁹

At the overall level, one significant shift has seen women make up the majority of affluent travellers in key Western markets like the US and UK for the first time. A study in 2013 first tracked this trend, placing the overall female share of the affluent market at 54%, up from 42% in 2010.⁹

Women have also been identified as more adventurous than men when it comes to both destinations and the kind of Tourism experiences they seek, whilst also expecting high quality accommodation and services based on their experiences as business travellers.⁹

The growth of “girls getaways” as a segment is evident throughout NSW and the Canberra Region. The term is used on several destination websites to filter search results, included in media and there is also a growing number of tourism businesses targeting this segment. For example:

- Lake Crackenback – www.lakecrackenback.com.au/specials/girls-getaway
- Queanbeyan Chronicle: <http://www.queanbeyanagechronicle.com.au/story/3913383/canberra-weekend-away-things-to-do-the-ultimate-girls-weekend/?cs=34>
- Girls Getaways www.girlsgetaways.com.au/
- Just Girls Getaway <https://justgirlsgetaway.com.au/>
- Visit Victoria -www.visitvictoria.com/Things-to-do/Touring-routes/Girls-getaways

These are relatively new niche markets in Australia so robust data is currently limited. However, the forecast growth is strong.

Insights – What it means for Queanbeyan-Palerang

The women's market may present a viable target market for Queanbeyan-Palerang. Further research into available and relevant product should be undertaken.

TOURISM IN THE CANBERRA TABLELANDS REGION

Regional Economic Development and Marketing Organisations

The Canberra Region Joint Organisation (CBRJO) has joined with the ACT Government supporting the Canberra Region brand. This comprises the destination elements of:

- Alpine: Snowy Mountains region
- Coast: Eurobodalla and the Sapphire Coast tourist regions
- City: Canberra and Queanbeyan
- Tablelands: incorporating five LGAs - Queanbeyan-Palerang, Yass Valley, Hilltops, Goulburn-Mulwaree and Upper Lachlan

Queanbeyan-Palerang falls into both the City and Tablelands destinations and will be able to take advantage of the regional marketing activities across both these areas.

Queanbeyan-Palerang will also benefit from the activities of the Destination Southern NSW Destination Network where the key role is to facilitate visitor economy growth at the local level, through representing and co-ordinating the region's tourism industry.

Current Tourism Performance in the Canberra Region – Tablelands

For the year ending June 2016, the Canberra Region – Tablelands received a total of 1,926,000 visitors. The largest group were domestic day visitors, with a total of 1,115,000 visitors representing 58% of all visitors⁵.

The region is extremely dependant on the domestic market, accounting for 98% of all overnight visitors and 91% of visitor nights.

Canberra Region – Tablelands	June 2016	%
Domestic Overnight Visitors p.a. ('000)	798	41%
Domestic Day Visitors p.a. ('000)	1,115	58%
International Overnight Visitors p.a. ('000)	13	1%
TOTAL	1,926	100%

Canberra Region – Tablelands	June 2016	%
Domestic Overnight Visitors p.a. ('000)	798	98%
International Overnight Visitors p.a. ('000)	13	2%
TOTAL	811	100%

Canberra Region – Tablelands	June 2016	%
Domestic Nights p.a. ('000)	1,926	91%
International Nights p.a. ('000)	198	9%
TOTAL	2,124	100%

Source: Canberra Region – Tablelands Tourism Monitor

Overnight visitors

- There was a total of 811,000 overnight visitors
- Domestic overnight visitors represented the vast majority (98%) with a total of 798,000 visitors
 - This is the highest for any year ending period in the monitor time series (Mar 09–June 16)
 - This represents a 27.5% increase on the same period the previous year
 - Although the below average YE June 2015 estimate needs to be noted when considering the magnitude of the change, the latest estimate clearly represents an extension of the growth that commenced in eth period YE September 2015
 - It is also noted that the trends suggest that the Region is performing better than the overall market in terms of domestic overnight visitors
- There were 13,000 international overnight visitors
 - International overnights visitor numbers have remained relatively stable over recent periods with very little growth as far back as March 2009.



Current Tourism Performance in the ACT

Tourism in the ACT / Visitation to the ACT, June 2016 | Key Findings³

- Total of 4.66 million visitors
 - 52% domestic overnight visitors (2.39 million) – 17.3% increase on past year
 - 44% domestic day visitors (2.07 million) – 18.6% increase on past year
 - 4% International visitors (203,000) – 13.4% increase on past year
- Total of 11.35 million visitor nights
 - 56% domestic overnight visitor nights – 1.3% increase on past year
 - 44% International visitor nights – 8.9% increase on past year
- Source Markets
 - Domestic overnight visits – NSW accounted for 66%, followed by Victoria (18%) and Queensland (8%)
 - International markets – China was the largest source market (19%), followed by USA (11%), UK (11%) and NZ (8%)
- Total expenditure of \$2.12 billion
 - 63% domestic overnight expenditure (\$1.35billion) – 11% increase on past year
 - 20% International expenditure (\$420million) – 16.4% increase on past year
 - 17% domestic day expenditure (2.07 million) – 16.9% increase on past year
- The Visiting Friends and Relatives (VFR) market is driving much of the growth for domestic visitors and visitor nights, although in the last 12 months gains were also experienced under both the Holiday and Business sectors.
- The VFR sector clearly remains the ACT's largest, with a 38% share of the visitor market – followed by Business (29%) and Holiday (27%).

Access and Transport

An efficient transport network is one of the reasons tourism visitation to the Canberra Tablelands region has increased steadily over the past 15 years.⁷

The region is in close proximity to major regional markets in Sydney and the ACT, as well as having good access to national and international markets via the Sydney – Canberra – Melbourne transport corridor – road and rail, plus air and port facilities.⁶

Getting to and around the region easily and safely converts a high percentage of people interested in a Greater Capital Region tourism experience from interstate and overseas.

The Canberra International Airport is again a significant link into the region for these markets and has contributed significantly to the economies of SE NSW and the ACT.⁶ Canberra Airport is the only curfew free airport servicing NSW and international flights into Canberra commenced September 2016. Canberra Airport plays a pivotal role in the current and future success of Canberra and the region as a major social, tourism, business, government, and trade gateway.¹⁶

There are several regional airports in the region which provide tourism opportunities, particularly in popular tourist destinations such as the Far South Coast and Alpine. The Moruya Regional Airport Master Plan outlines plans for the future growth of the airport as a transport, tourism and commercial precinct.⁵

The Southern Inland Region contains one of the main highways within Australia, the Hume Highway – a four lane highway that connects Sydney and Melbourne. The Federal Highway connects the ACT to the Hume Highway. Other major road connections include the Snowy Mountains Highway (connecting the region to the east coast) and Monaro Highway (connecting the region to Victoria).

The SIR is also criss-crossed with a network of secondary highways and connecting roads that link the region's towns and smaller populated places. The significance of modern and safe road infrastructure has been recognised as a potential major asset for the region and the goal of securing adequate road infrastructure is being actively pursued by the main stakeholders in the region.

Queanbeyan is well served by train and coach services and is only 10 minutes from Canberra Airport.

Insights – What it means for Queanbeyan-Palerang
Domestic tourism is the key and most important sector

The absence of significant change in volume over the period underscores the importance of domestic tourism to the region.⁴

Further, if the introduction of Singapore-Canberra air services do not achieve a significant change in volume in the medium term, it is suggested that CRT executive carefully assess the Region's potential to attract international visitors.⁴

Source Markets of Domestic Overnight Visitors

Destination NSW estimates that the South East and Tablelands region's visitor economy is worth over \$1.6 billion per year and brings in over 6.1 million visitors each year. Almost 70% of the economic contribution to tourism in the region comes from the Far South Coast (40%) and the Alpine (27%).⁵

Visit Canberra identifies that the key source of domestic overnight visitors is NSW (66%), followed by Victoria (18%) and Queensland (8%).³

At the local level, Queanbeyan-Palerang overnight domestic trips are dominated by the Sydney market.

- Sydney is by far the biggest source market for Domestic Overnight visitors – accounting for a total of 32% of visitors and 26% of domestic visitor nights.
- The NSW South Coast is the second largest source market – accounting for a total of 14% of visitors and 11% of domestic visitor nights.
- Other important source markets include Capital Country, Canberra and Melbourne.

Food and Wine tourism

Regional food has also become a significant feature of the tourism industry in the *Southern Inland Region*, attracting visitors to the region to try and buy produce that enjoys a favourable reputation in Australia and overseas. The region's truffles, cider apples, olives, figs, wines, persimmons, free range pork, sheep and cattle top a list of fresh produce that features in local providores and encourages visitors to drive to producers' farm gates and enjoy meals throughout the day that showcase locally grown produce.⁶

The Poachers Way food and wine trail is a good example of combining the region's exceptional artists, chefs, winemakers, galleries and rural retreats into a trail experience.

Nature-based Tourism

The Southern Inland Region (SIR) has no heavy industry or significant mining operations within its territory, meaning the region enjoys a 'clean air, no pollution' image.⁷ This offers substantial opportunities for the promotion of local agriculture products as well as various tourism initiatives. The environmental credentials of the region are further enhanced by the fact that the SIR is the largest producer of clean energy in mainland Australia.⁶

CURRENT STATE OF TOURISM IN QUEANBEYAN-PALERANG REGION

Queanbeyan-Palerang is a relatively immature tourism destination, which constrains the local tourism potential. The QPRC Operation Plan identifies that this is due in part to a lack of attractions, activities, the choice and distribution of accommodation, and the lack of cohesion and promotion across the shire.¹²

In addition, the plan identifies a need to extend and/or improve infrastructure such as parking, streetscapes, public amenities and footpaths in our villages to support local business development.¹²

Queanbeyan-Palerang Council has been working on the urban renewal of the Queanbeyan CBD in recent years and this should have a positive impact on the tourism industry for the region as a whole. The project started in the CBD a number of years ago with the revitalisation of Crawford St, which is now a lovely shopping, café and accommodation precinct and bears no resemblance to its former state. The project is now referred to as "CBD Upgrade Stage 2", including other more recent projects such as the major landscaping and urban design project across the river in Queen Elizabeth Park and the adjacent Collett St precinct, as well as public art projects such as Queany the Platypus on the banks of the Queanbeyan River.

Key Tourism Measures

In the year ending June 2016, Queanbeyan-Palerang achieved the following tourism outcomes:

- Visitors: total of 518,000 visitors to the region, including 309,000 overnight visitors.
- Nights: 647,000 nights spent in the region

Table: Key Measures Queanbeyan-Palerang Region;
2 Years Ending June 2016

Key Measures	Queanbeyan-Palerang Region
Total Visitors (overnight and domestic daytrip) (000's)	518
Total Overnight Visitors (000's)	309
Total Nights (000's)	647

Source: Queanbeyan-Palerang Regional Data – NVS and IVS

Visitor Type

Over the last 10 years, domestic visitors have dominated the local Queanbeyan-Palerang tourism industry. In the 2 years ending June 2016:

- Domestic Overnight Visitors accounted for 40.5% and Domestic Day Visitors accounted for 59% of all visitors.²
- Domestic Nights accounted for 90% all visitor nights.²

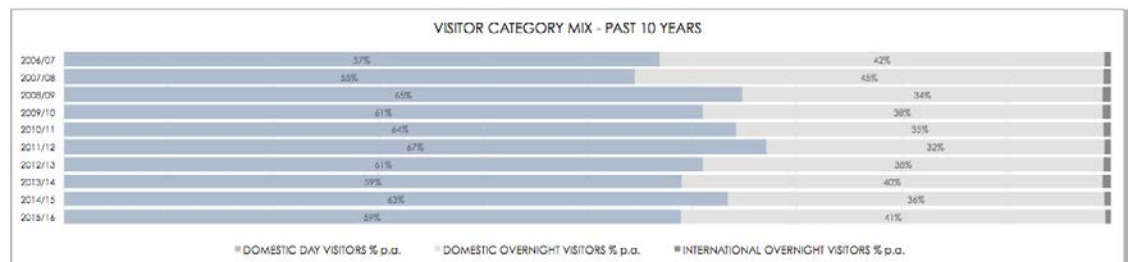
Table: Queanbeyan-Palerang – Domestic Overnight visitors – Visitor Type
2 Years Ending June 2016

Visitor Type	Visitor Numbers	%
Domestic Overnight Visitors p.a. ('000)	210	40.5%
Domestic Day Visitors p.a. ('000)	306	59%
International Overnight Visitors * p.a. ('000)	2.9	0.5%
Total	518	100%

Source: Queanbeyan-Palerang Regional Data – NVS and IVS

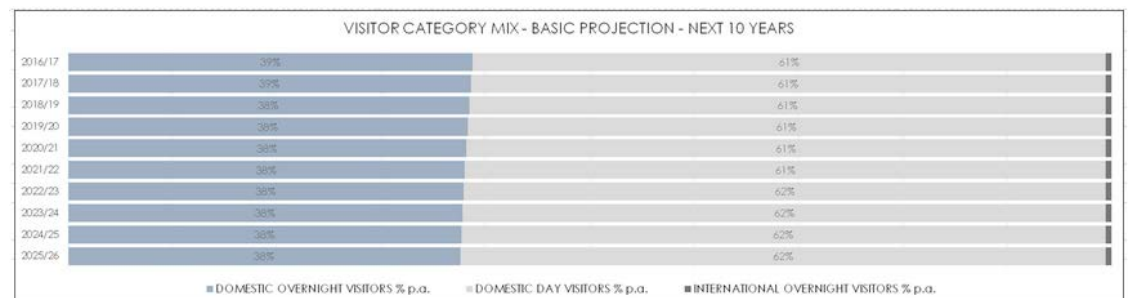
Visitor Nights	Visitor Numbers	%
Domestic Nights p.a. ('000)	585	90%
International nights p.a. ('000)	62	10%
Total	647	100%

Source: Queanbeyan-Palerang Regional Data – NVS and IVS



It is projected that the mix of total visitors to the local area will remain relatively unchanged and stable over the next 10 years, with:

- Domestic Overnight Visitors dropping to 38% of all visitors
- Domestic Day visitors growing to 62% of all visitors; and
- International overnight visitors continuing to represent less than 1% of all visitors.



Source Markets of Domestic Overnight Visitors

Source markets have been examined for Domestic Overnight visitors to the Queanbeyan-Palerang region and they key source markets are as follows:²

- Sydney is by far the biggest source market for Domestic Overnight visitors – accounting for a total of 32% of visitors and 26% of domestic visitor nights.
- The NSW South Coast is the second largest source market – accounting for a total of 14% of visitors and 11% of domestic visitor nights.
- Other important source markets include Capital Country, Canberra and Melbourne.

Table: Queanbeyan-Palerang – Domestic Overnight visitors – Source Markets
(4 Years Ending 2015/16)

Source Market	% Visitor Numbers	% Visitor Nights
Sydney	32%	26%
South Coast	14%	11%
Capital Country	8%	7%
Canberra	6%	4%
Melbourne	6%	7%
Riverina	4%	2%
Hunter	3%	4%
Central NSW	4%	4%
Central Coast	3%	3%
North Coast NSW	1%	2%
All other 77 regions in Australia	20%	31%
Total	100%	100%

Source: Queanbeyan-Palerang Data Master 8.0 prepared by Peter Valerio; DOM ONIGHT VISITOR PROFILE, Table DVP1 and Table DVP2

Purpose of Trip

The largest group of Domestic Overnight visitors to Queanbeyan-Palerang are the visiting Friends and relatives group, accounting for 42% of all visitors in the year ending June 2016. Holiday makers account for roughly a third of domestic overnight visitors whilst business travellers account for 22%.²

Table: Queanbeyan-Palerang – Domestic Overnight visitors – Main Purpose of Trip
(Visitor estimates average annual (000) based on a rolling four years, 4 years ending June 2016)

Main Purpose of Trip	#	%
Visiting friends and relatives ('000)	87	42%
Holiday ('000)	63	31%
Business ('000)	45	22%
Other reason – Not stated/not asked ('000)	9	4%
Total	204	100%

Source: Queanbeyan-Palerang Data Master 8.0 prepared by Peter Valerio; DOM ONIGHT VISITOR PROFILE, Table DVP3

The VFR market can be further split into both Visiting friends and visiting relatives. Visiting relatives accounts for 78% of the VFR market sector.

Table: Queanbeyan-Palerang – Domestic Overnight visitors – VFR visitors
(Visitor estimates average annual (000) based on a rolling four years, 4 years ending June 2016)

VFR	#	%
Visiting relatives ('000)	68	78%
Visiting friends ('000)	19	22%
Total	87	100%

Length of Stay

The majority of Domestic Overnight Visitors are only staying 2 nights or less in Queanbeyan-Palerang – in the year ending June 2016 this accounted for 62% of all visitors with the 10 year average being 66%.² There is a large opportunity to extend visitor nights in the region.

Table: Queanbeyan-Palerang – Domestic Overnight Visitors x Length of Stay
Visitor estimates average annual (000) based on a rolling four years

Length of Stay based on a rolling four years	% YE June 2016	10 year Average
1 night	37%	36%
2 nights	25%	30%
3 nights	12%	13%
4–7 nights	21%	17%
8–14 nights	4%	3%
15–30 nights	1%	1%
Total	100%	

Source: Queanbeyan-Palerang Data Master 8.0 prepared by Peter Valerio; DOM ONIGHT VISITOR PROFILE, Table DVP5

Demographics – Travel Party and Age

The spread of domestic overnight travellers to Queanbeyan-Palerang in terms of age group has remained relatively stable over the last 10 years. The largest age group of all domestic overnight travellers in the year ended June 2016 is 55+, accounting for 35%. This has remained relatively stable over the past 10 years with an average of 34%. The second largest group is 45-54 year olds with a 10-year average of 20%. In total, the 45+ age group accounted for 54% of all domestic overnight travellers to Queanbeyan-Palerang in June 2016.

Age group	4 Years Ending										Average
	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	
15-24	11%	10%	12%	13%	13%	13%	11%	14%	13%	10%	12%
25-34	10%	11%	12%	18%	18%	19%	20%	16%	17%	18%	16%
35-44	23%	21%	20%	14%	13%	16%	16%	17%	16%	17%	17%
45-54	20%	23%	22%	22%	23%	18%	19%	19%	18%	19%	20%
55+	37%	35%	34%	34%	33%	34%	34%	33%	35%	35%	34%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	

Source: Queanbeyan-Palerang Data Master 8.0 prepared by Peter Valerio; DOM ONIGHT VISITOR PROFILE, Table DVP11

Similarly, there has only been minor change noted across the types of travel groups over the last decade. The largest age group of all domestic overnight travellers in the year ended June 2016 is people Travelling alone (32%), followed by Adult couples (26%), Family groups (21%) and friends or relatives travelling together (15%).²

Travel Party Type	#	%	10 year Average
Visitor estimates average annual (000) based on a rolling four years			
Travelling alone	65	32%	27%
Adult couple	53	26%	28%
Family group – parents and children	43	21%	21%
Friends or relatives travelling together	31	15%	17%
Business associates travelling together	8	4%	5%
Group (including sporting, school etc)	3	1%	1%
Total	204	100%	

Source: Queanbeyan-Palerang Data Master 8.0 prepared by Peter Valerio; DOM ONIGHT VISITOR PROFILE, Table DVP4

Key Activities

Both Domestic Overnight and Domestic Day visitors to Queanbeyan-Palerang participate in a range of social, cultural and nature based activities.

- Social Activities – Important for both domestic overnight and day visitors to Queanbeyan-Palerang
 - 'Visit friends and relatives' is listed in the top two activities for both domestic overnight and day visitors.
 - 'Eat out / dine at a restaurant and/or café' is the most common activity listed for Domestic Day Visitors second most common activity for Domestic Overnight Visitors.
 - 'Pubs, clubs etc' ranks in the top 6 activities for both Domestic Overnight Visitors and Domestic Day Visitors.
- Cultural / Heritage / Art Activities – Important for both domestic overnight and day visitors to Queanbeyan-Palerang
 - 'Visit museums or art galleries' and 'Visit history / heritage buildings, sites or monuments' ranks in the top 8 for both domestic overnight and day visitors
 - 'Attend festivals / fairs or cultural events' and 'Go to markets' also rank in the top 15 activities for domestic overnight visitors
- Nature Activities – Important for domestic overnight visitors to Queanbeyan-Palerang
 - 'Bushwalking or Rainforest walks' ranks in the top 5 activities for Domestic Overnight Visitors.
 - 'Visit national parks / state parks' is in the top 12 activities for Domestic Overnight Visitors.

Table: Domestic Overnight Visitors x Activity Category
4 Year Period Ending June 2016

Activity Category Visitor estimates average annual (000) based on a rolling four years	#	%	10 year Average
Social activities	179	88%	89%
Outdoor/nature	61	30%	25%
Arts/heritage	59	29%	27%
Active outdoor/sports	39	19%	19%
Local attractions/tourist activities	25	12%	13%
Other activities – Not asked	51	25%	30%
Total	204		

Source: Queanbeyan-Palerang Data Master 8.0 prepared by Peter Valerio; DOM ONIGHT VISITOR PROFILE, Table DVP7

The following tables further detail the key activities for visitors to Queanbeyan-Palerang across both Domestic Overnight and Domestic Day visitors.

Table: Detailed Trip Activity List for Domestic Overnight Visitors to Queanbeyan-Palerang
10 Year Period Ending June 2016

Stopovers = 1 (i.e. QP Only overnight destination); Red = low sample size; use caution

Activity	10 Yr Volume	Annual Avg.	%
Visit friends & relatives	746	75	55%
Eat out / dine at a restaurant and/or cafe	619	62	45%
Sightseeing/looking around	294	29	22%
Pubs, clubs, etc	277	28	20%
Go shopping for pleasure	276	28	20%
Visit museums or art galleries	170	17	12%
Bushwalking / rainforest walks	155	16	11%
Visit history / heritage buildings, sites or monuments	118	12	9%
Play other sports	89	9	7%
Attend festivals / fairs or cultural events	84	8	6%
Picnics or BBQs	81	8	6%
Visit national parks / state parks	72	7	5%
Go to markets	57	6	4%
Go on a daytrip to another place	55	6	4%
Visit farms	53	5	4%
Visit botanical or other public gardens	47	5	3%
Total	1,365	137	100%

Source: Queanbeyan-Palerang Data Master 8.0 prepared by Peter Valerio

Table: Detailed Trip Activity List for Domestic Day Visitors to Queanbeyan-Palerang
15 Year Period Ending June 2016

Red = low sample size; use caution

Activity	15 Yr Volume	Annual Avg.	%
Eat out / dine at a restaurant and/or cafe	1,667	111	41%
Visit friends & relatives	1,502	100	37%
Sightseeing/looking around	965	64	24%
Go shopping for pleasure	856	57	21%
Visit museums or art galleries	373	25	9%
Pubs, clubs, discos etc	230	15	6%
Picnics or BBQs	219	15	5%
Visit history / heritage buildings, sites or monuments	192	13	5%
Total	4,027	268	

Source: Queanbeyan-Palerang Data Master 8.0 prepared by Peter Valerio

Insights – What it means for Queanbeyan-Palerang

Domestic Visitors and Short Break market

The Queanbeyan-Palerang region is heavily reliant on domestic visitors, with domestic day trips making up the majority of all visitors. Based on this, and the growing trend to take short breaks, there is a clear opportunity to try and convert domestic day visitors to domestic overnight visitors, and also to increase the number of nights visitors are staying.

The majority of domestic visitors are sourced locally either from regional NSW or Sydney. Queanbeyan-Palerang should aim to capitalise on regional marketing by CBRJO and the Southern NSW DN by ensuring that the region is featured as a destination within all Sydney and regional NSW targeted activities.

Visitor Demographics – Travel party and Age group

The mix of domestic overnight visitors has remained relatively stable over the last decade both in terms of travel party and age group. The majority of domestic overnight visitors are over 45 years of age (accounting for 54% in June 2016) with a mix of travel parties including people travelling alone, traveling with children and adult couples.

Based on the fact that these groups have remained so stable over the last decade, it is expected that these demographic groups will continue to represent the key markets for Queanbeyan-Palerang. Tourism product development and marketing activities should concentrate on experiences desirable to these demographic markets.

VFR Travellers

A vast majority of visitors to the region are Visiting Friends and Relatives (VFR) travellers. 'Visit friends and relatives' is listed in the top two activities for both domestic overnight and day visitors and the major type of accommodation category is 'a friends or relatives property'. There is an opportunity to tap into the VFR market via targeted marketing activities to increase expenditure locally.

Length of Stay

The majority of Domestic Overnight Visitors are only staying 2 nights or less in Queanbeyan-Palerang – in the year ending June 2016 this accounted for 62% of all visitors with the 10 year average being 66%. There is a large opportunity to extend visitor nights in the region.

Food and Wine experiences

'Eat out / dine at a restaurant and/or café' is the second most common activity for Domestic Overnight Visitors to Queanbeyan-Palerang and the most common activity listed for Domestic Day Visitors.

There are a handful of quality restaurants, cafes and old time pubs in the region, as well as the Southern Harvest Farmers Markets and the Queanbeyan wine trail (<http://www.visitqueanbeyan.com.au/wine-trail>). However, there is a good opportunity to expand on this by tapping into the burgeoning food and wine industry at the regional level (as described in previous section). Queanbeyan-Palerang could look at developing tourism product such as food trails, food and wine tasting opportunities etc.

Nature-based experiences

The Queanbeyan-Palerang region features national parks, nature reserves and many natural attractions including Goongong Dam, Goongong Foreshores, Molonglo Gorge, London Bridge and the Lowden Forest. The area also has some of the best mountain bike trails in the region including Kowen Hill and Sparrow Hill trails.

- 'Bushwalking or Rainforest walks' ranks in the top 5 activities for Domestic Overnight Visitors to Queanbeyan-Palerang;
- 'Visit national parks / state parks' is in the top 12 activities for Domestic Overnight Visitors to Queanbeyan-Palerang

With the global trend towards nature-based tourism experiences, there is a clear opportunity to further develop related tourism product offerings as well as design destination marketing specifically targeting nature-based travellers.

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