

# Shoalhaven Precinct Analysis

June 2025 - January 2026

# Methodology

This report examines activity within the Shoalhaven City Council precinct of **Sussex Inlet and Surrounds**, analysing the period from **June 2025 to January 2026**. Monthly snapshots are used to monitor accommodation performance, transaction activity, and foot traffic trends.

The analysis also includes dedicated **event reporting for the Viking Festival and the June Long Weekend**, assessing the impact of these periods on visitation and economic activity within the precinct.

## **Spend Definitions:**

**Local:** Anyone based inside **Shoalhaven**.

**Visitors:** Anyone originating from outside the **Shoalhaven**.

While Localis endeavours to ensure the methodologies and data used in this report are best practice and as accurate as possible, it is agreed and understood that the client accepts sole responsibility for how the data is used. Localis accepts no responsibility for any loss incurred as a result of using this data.

# Analysis Areas

The area's highlighted below are the boundaries that were used for collection of mobility (devices) data, transactional data and accommodation data.

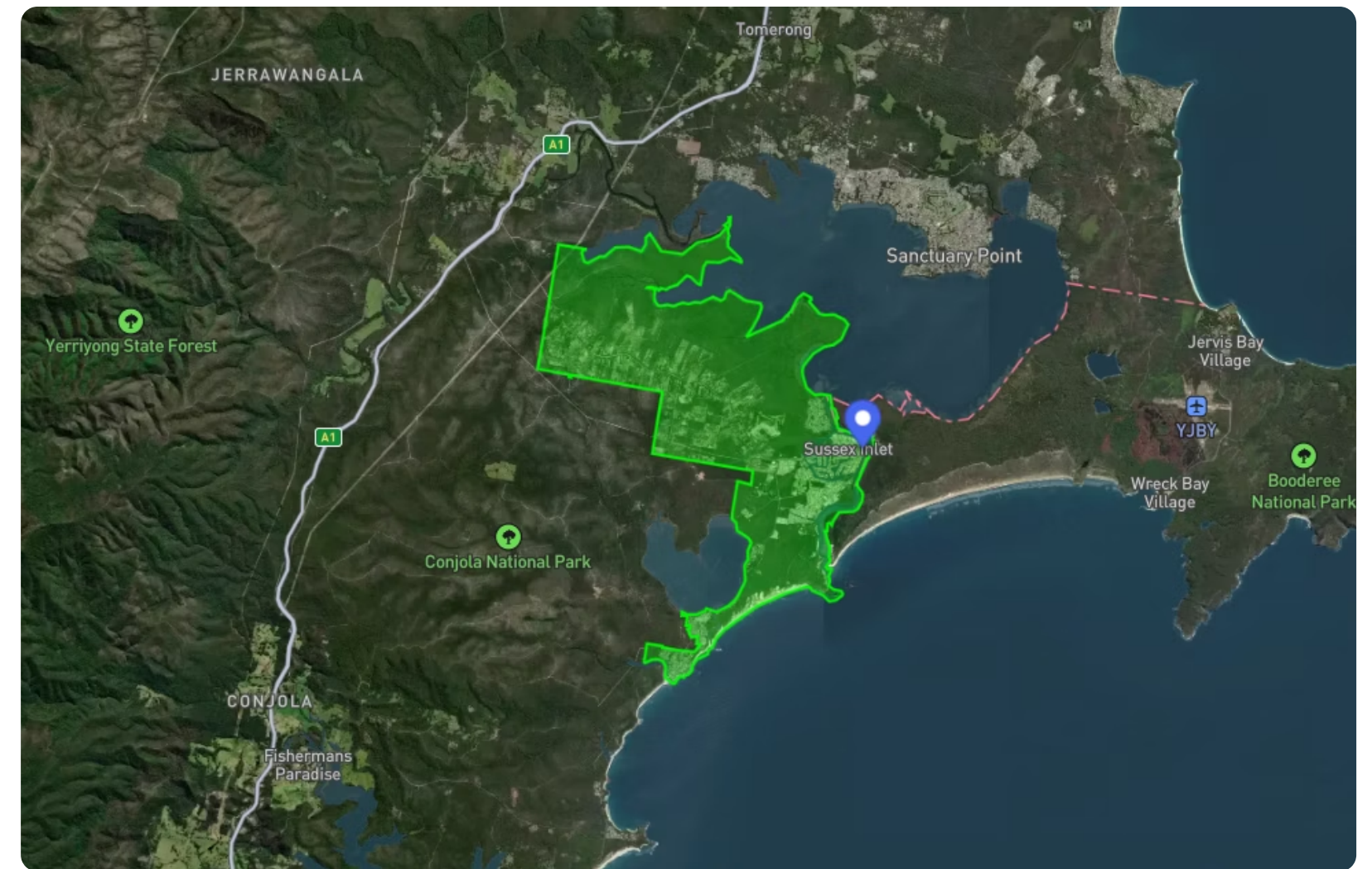
## Sussex - Inlet Precinct

Mobility Data



## Sussex Inlet - Berrara

Transaction and Accommodation Data

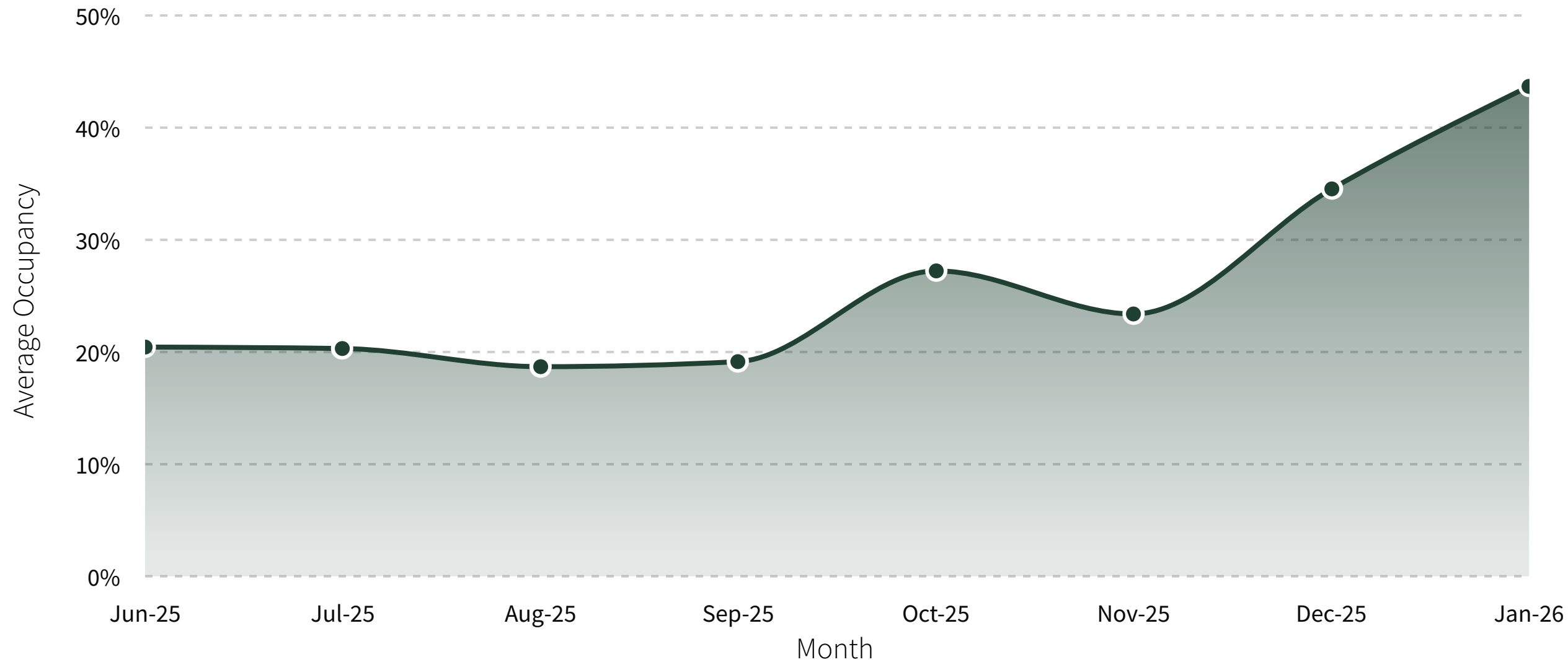


# Accommodation

# Monthly Occupancy

Jun 2025 - Jan 2026

Short-Term Rentals (Houses, Apartments, Guest Houses)



Last Month

**44%**

Occupancy

Peak Month: *January*

**44%**

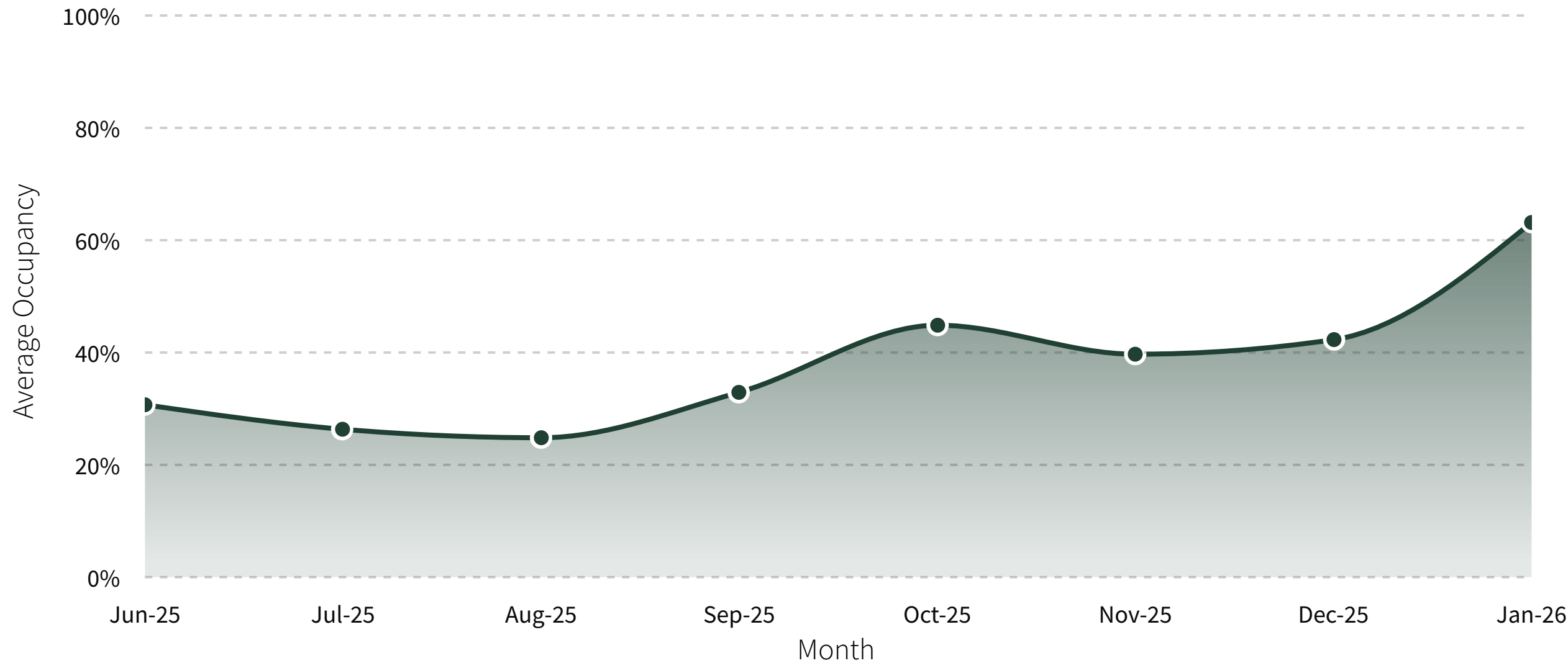
Occupancy

Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26
20%	20%	18%	19%	27%	23%	34%	44%

# Monthly Occupancy

Jun 2025 - Jan 2026

Premium Accommodation (Resorts, Holiday Parks, Motels)



Last Month

**63%**

Occupancy

Peak Month: January

**63%**

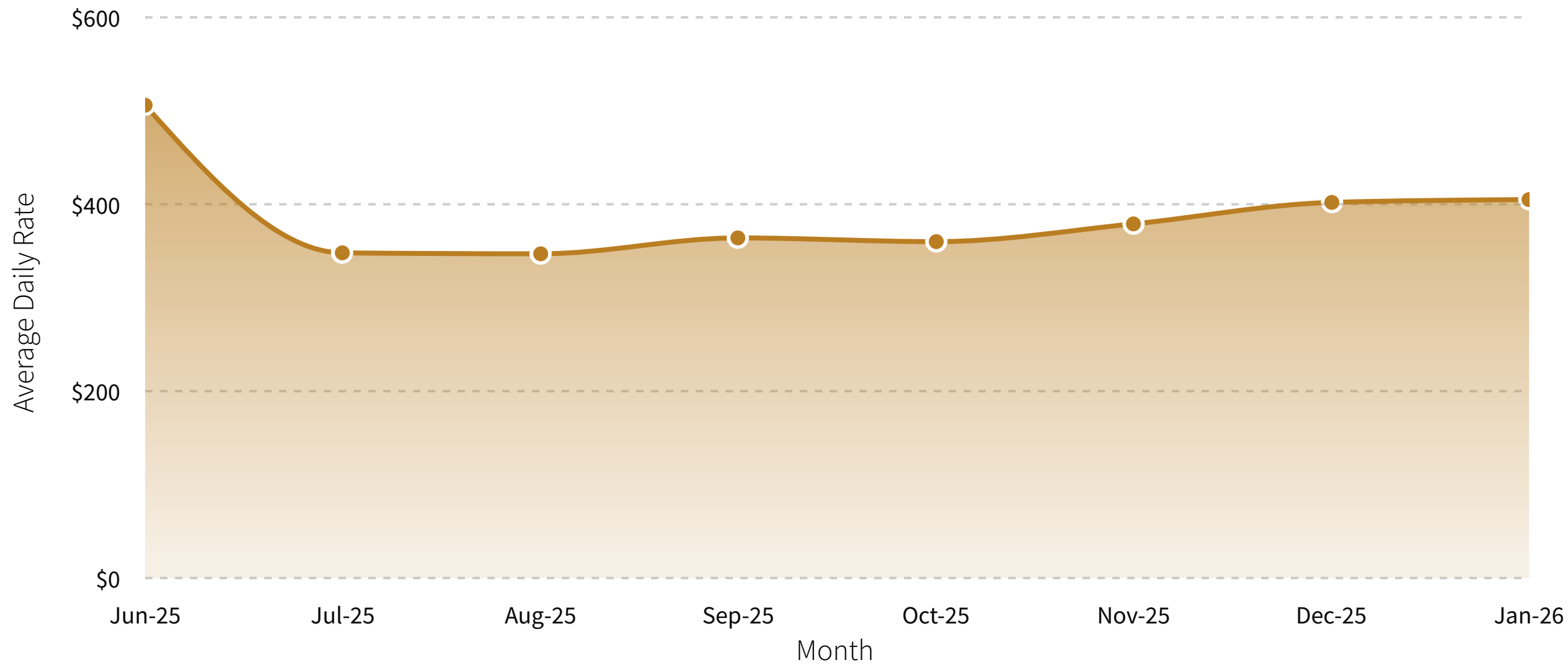
Occupancy

Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26
31%	26%	25%	33%	45%	40%	42%	63%

# Monthly Average Daily Rate

Jun 2025 - Jan 2026

Short-term Rentals



Last Month

**\$405**

Average Daily Rate

Peak Month: *June*

**\$506**

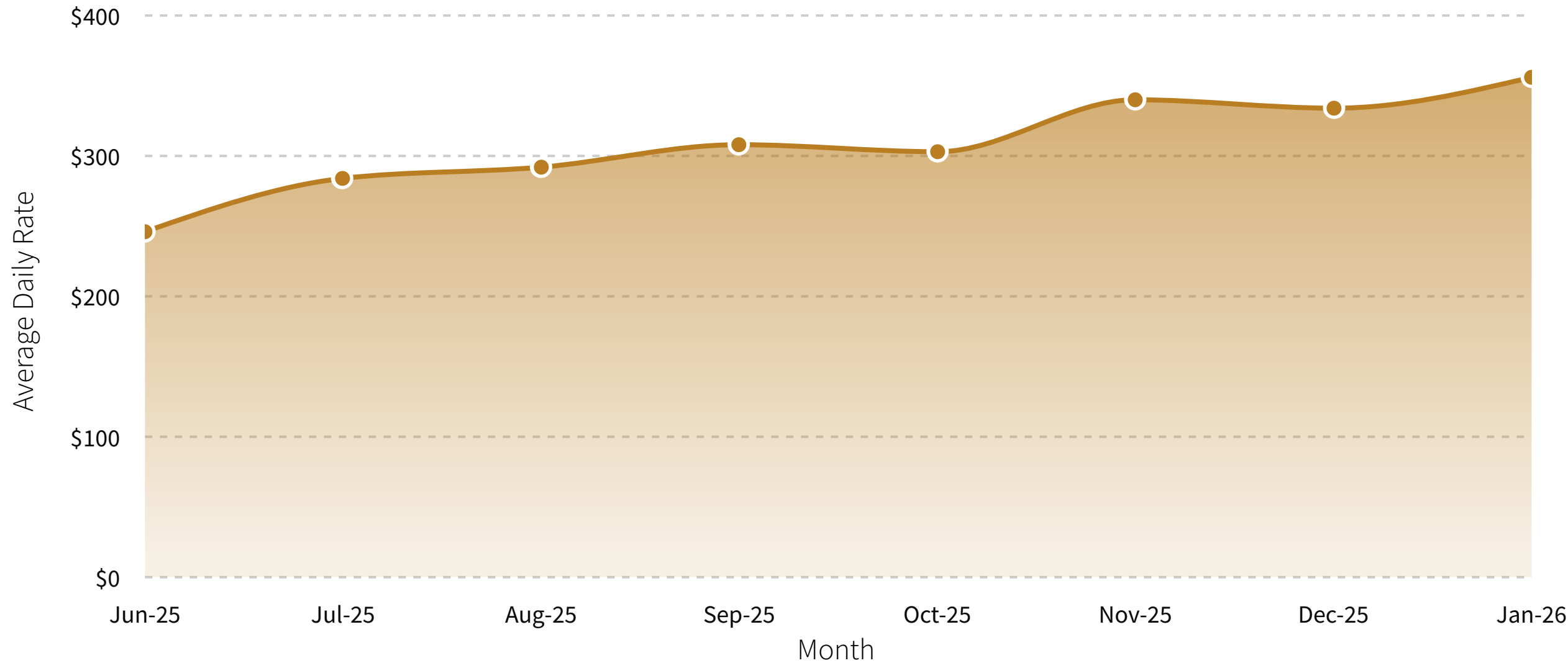
Average Daily Rate

Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26
\$506	\$348	\$347	\$364	\$360	\$379	\$402	\$405

# Monthly Average Daily Rate

Jun 2025 - Jan 2026

Premium Accomodation



Last Month

**\$356**

Average Daily Rate

Peak Month: *January*

**\$356**

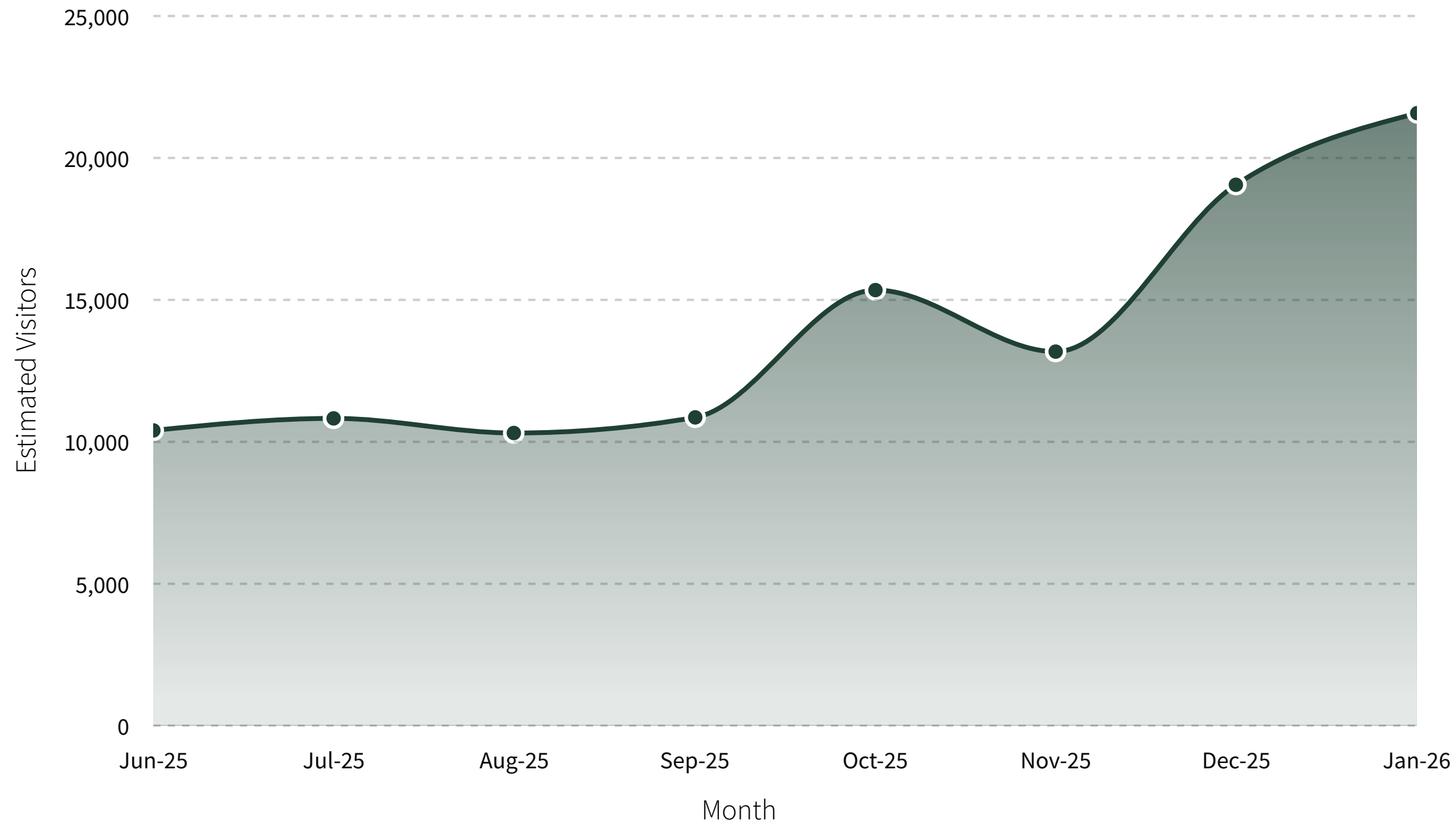
Average Daily Rate

Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26
\$246	\$284	\$292	\$308	\$303	\$340	\$334	\$356

# Visitation

# Estimated Visitors

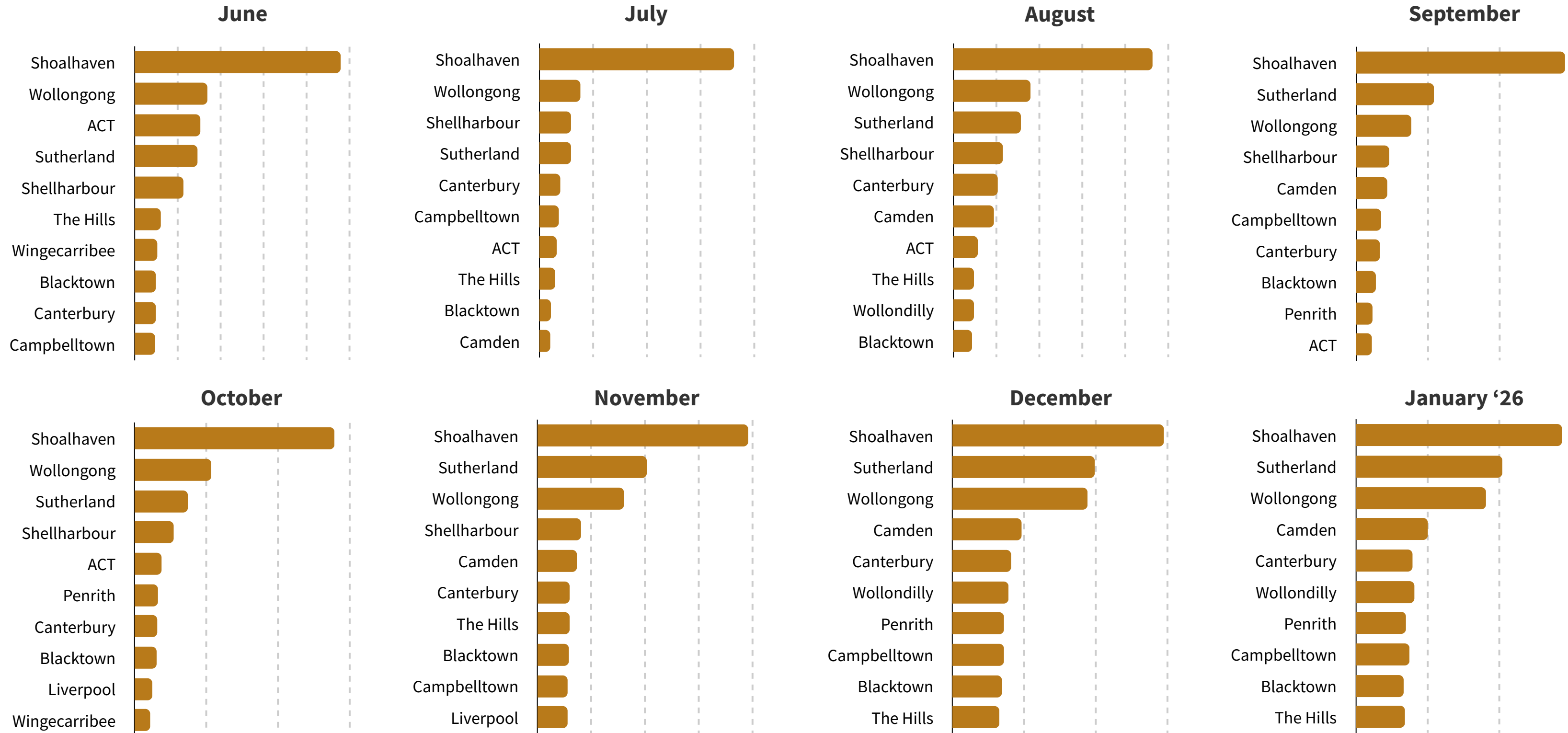
Jun 2025 - Jan 2026



Month	Estimated Visitors
Jun-25	8510 - 10402
Jul-25	8858 - 10826
Aug-25	8437 - 10311
Sep-25	8887 - 10861
Oct-25	12555 - 15345
Nov-25	10782 - 13178
Dec-25	15591 - 19055
Jan-26	17654 - 21578

# Visitor Origins - LGA

Jun 2025 - Jan 2026

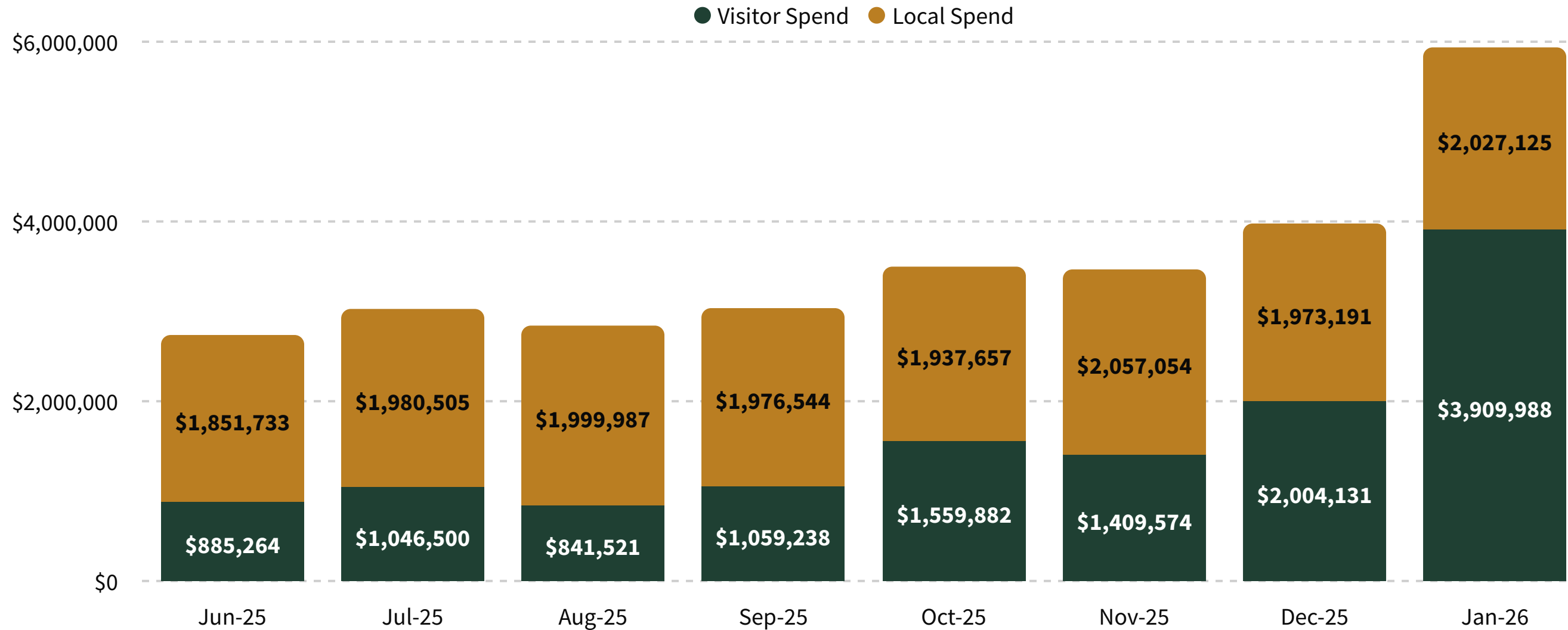




# Transaction

# Monthly Spend

Jun 2025 - Jan 2026



Last Month

**\$3.91M**

Visitor Spend

Last Month

**\$2.03M**

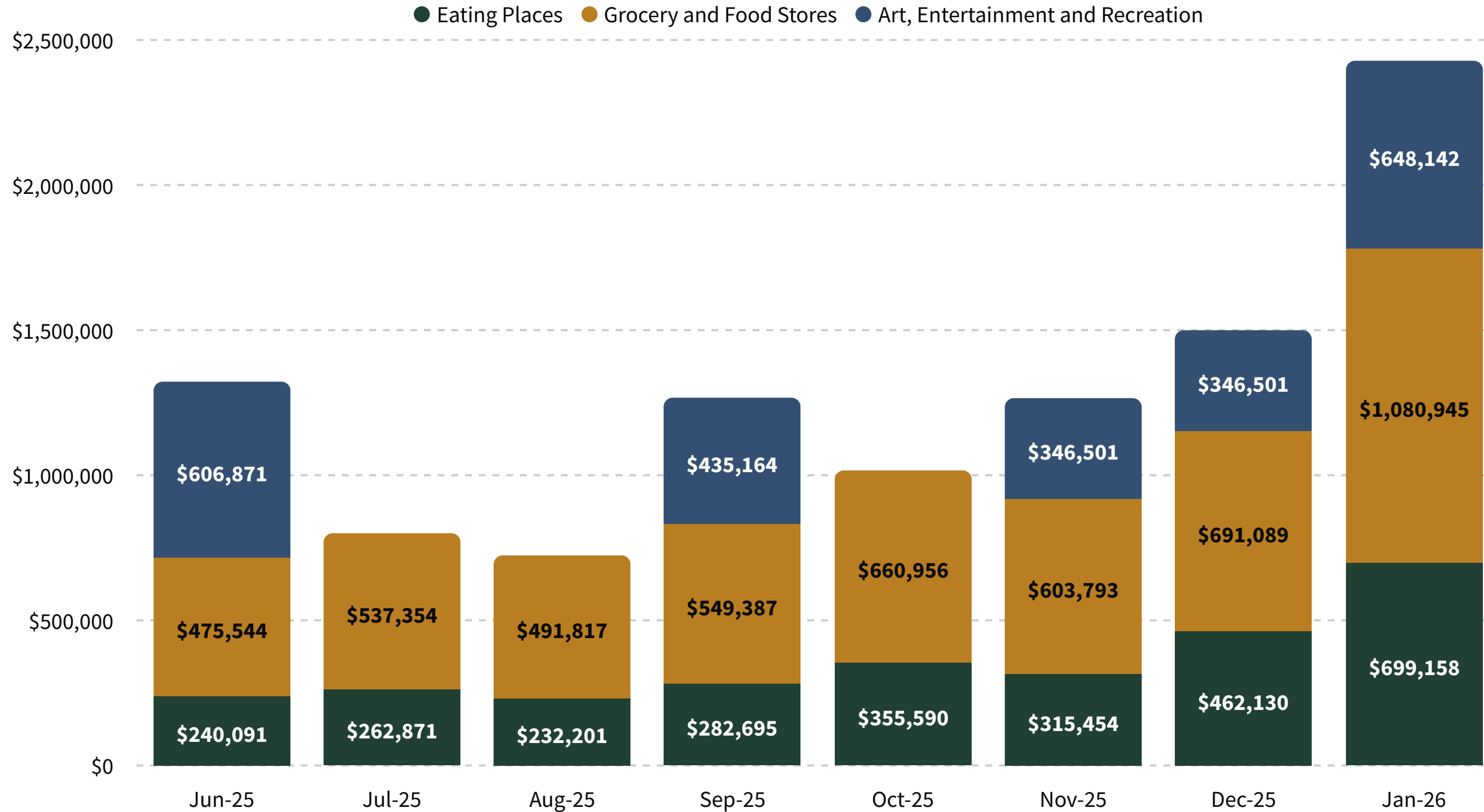
Local Spend

## Total Spend

Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26
\$2,736,997	\$3,027,005	\$2,841,508	\$3,035,782	\$3,497,539	\$3,466,628	\$3,977,322	\$5,937,113

# Monthly Spend - Category

Jun 2025 - Jan 2026



Last Month

**\$1.08M**

Grocery and Food Stores

Last Month

**\$699K**

Eating Places

Last Month

**\$648K**

Art, Entertainment and Recreation

# Viking Festival - Long Weekend

# Visitor Origins - Viking Festival

Top 10 Local Government Areas

Local Government Area	Percentage
Shoalhaven	29.55%
Unincorporated ACT	9.22%
Sutherland	7.09%
Wollongong	6.15%
Canterbury-Bankstown	3.78%
Wingecarribee	2.84%
Blacktown	2.60%
Wollondilly	2.36%
Campbelltown (NSW)	2.36%
Shellharbour	2.36%

Top 10 Suburbs

Suburb	Percentage
Menai	18.52%
Moss Vale	14.81%
Huskisson	7.41%
Colebee	7.41%
Yarralumla	7.41%
Concord	7.41%
Rydalmere	7.41%
Marrickville	7.41%
Eschol Park	7.41%
Mascot	3.70%

**5,226 - 6,846**

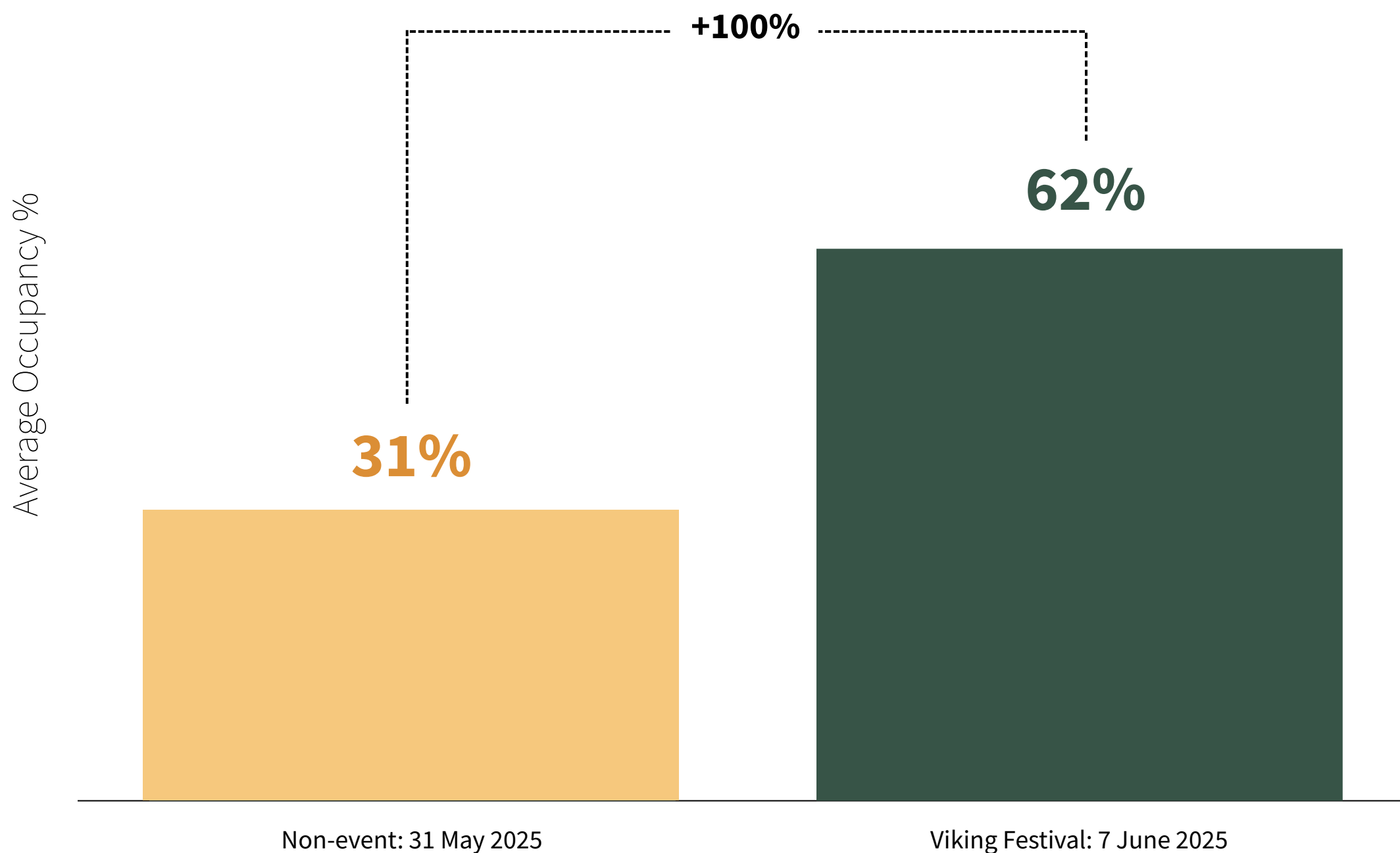
Estimated Total Unique Attendance

These estimations include all traffic and pedestrians that passed through the geofence during the event

### Key Insight

Analysis of unique devices that were detected during **Viking Festival** on the 7th of June, 2025. The **estimated total unique attendance was between 5,226 - 6,846**, with **70.45% of visitation coming from outside the Shoalhaven City Council area.**

# Accommodation

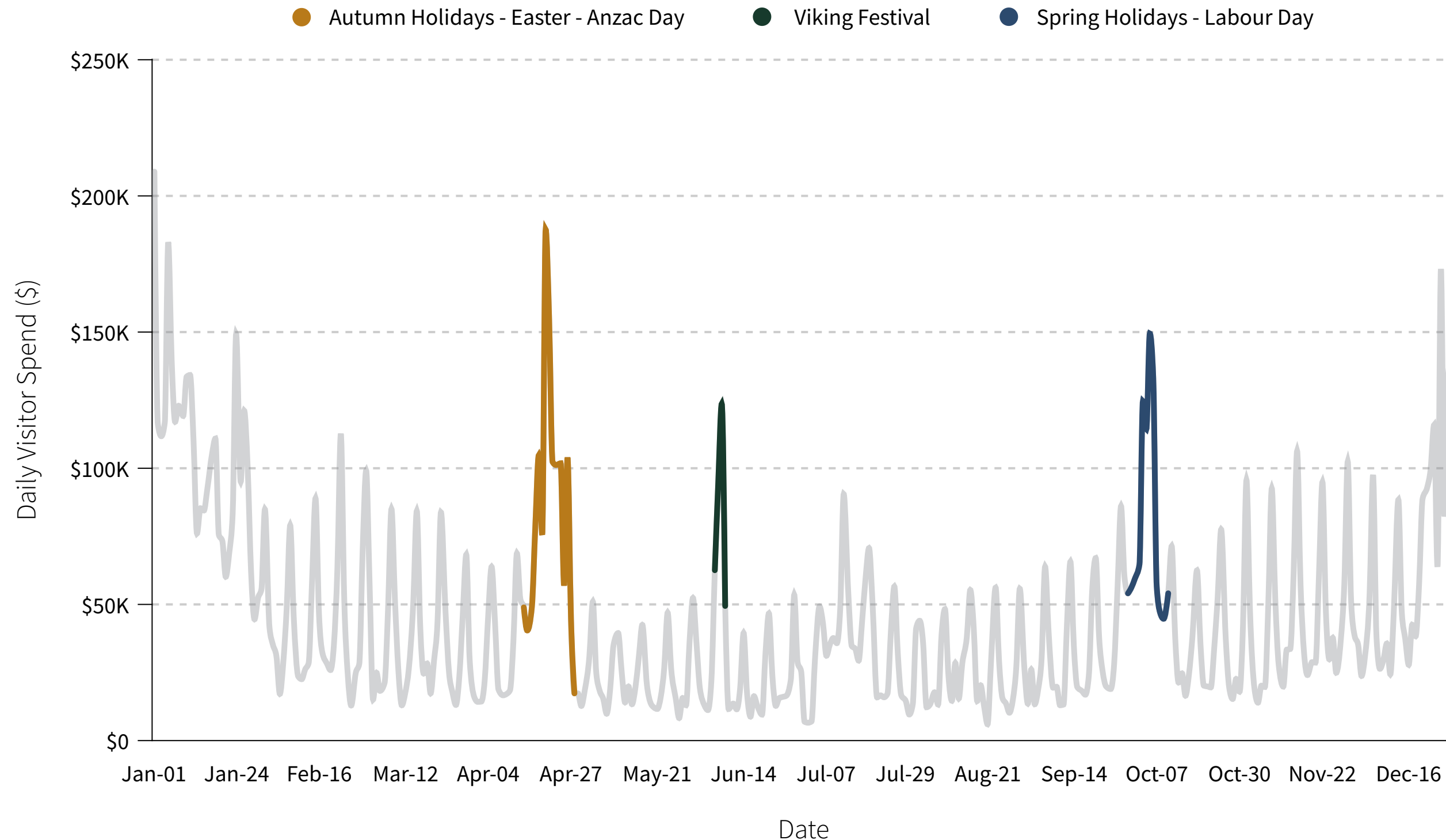


**+100%**  
Occupancy change when compared to non-event period

### Key Insight

An analysis of 260+ hotels, motels and sharing economy properties in the **Sussex - Inlet Precinct** showed that on the event day of the event had an **average occupancy of 62%**, which is an **increase of 100% compared with a non-event period** one week before the event.

# Daily Visitor Spend - Event Comparison



### Key Insight

Visitor spend during the event peaked on Sunday 8 June reaching an estimate of \$123,629, the highest Sunday in 2025 outside non-event periods and the fifth highest Sunday overall. Visitor spend across 7-8 June reached \$218K up 78% compared to the standard weekend (non-holiday) spend in 2025.