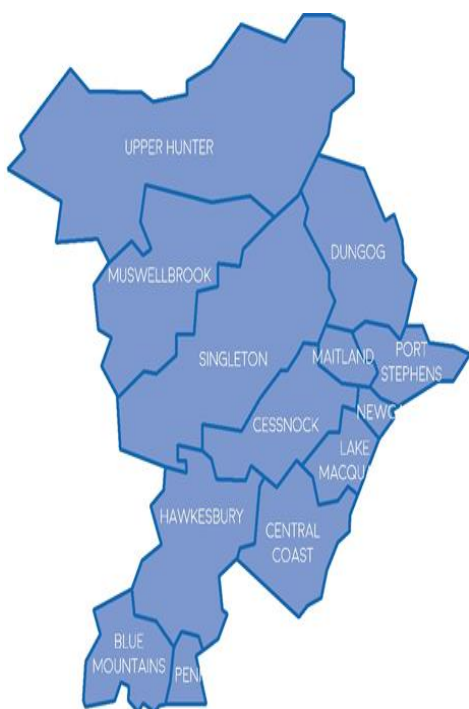




Destination  
Sydney Surrounds North

# The Value of Tourism to Sydney Surrounds North 2018



**Every minute of every day,  
Tourism delivers \$8,802  
of visitor spend into  
Sydney Surrounds North**

**That is almost \$12.7 million per day!!  
A value that has grown by 5.7%  
in the last year alone.**



Tourism delivers **4.8%** of our jobs, supports **14,265** businesses and delivers **3.2%** of our region's Gross Value Add which has grown every year since 2010/11 at an average **4.0%** pa.

### HOW DOES TOURISM COMPARE WITH OTHER MAJOR INDUSTRIES IN THE REGION?

The NSW Visitor Economy (3.0% direct share of state total GDP) is worth more than Agriculture, Forestry and Fishing combined (2.0% share of state total) and scores just below Mining (3.2% share of state total) in contribution to NSW.

Tourism in NSW is the 2nd largest NSW industry in terms of exports of merchandise and services (behind Mining and ahead of Manufacturing).

1. Mining (\$17.5 billion)
2. Tourism (\$13.0 billion)
3. Manufacturing (\$9.8 billion)

### EMPLOYMENT DUE TO TOURISM

#### Tourism's DIRECT Contribution to Employment

FULL TIME 14,172

PART TIME 14,876

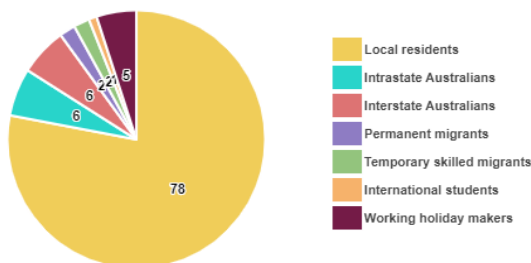


Supporting our local economy, Tourism supplies 4.8% of the region's employment including 29,220 persons who are directly employed and a further 12,359 who are indirectly employed.

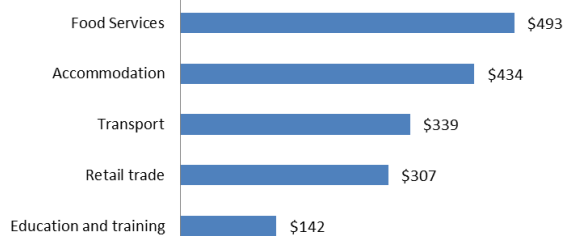
There are 14,265 tourism related businesses in Sydney Surrounds North, around 38% of all Regional NSW Tourism businesses.

### BUSINESSES RELYING ON TOURISM

Economically, these tourism businesses deliver almost \$2.0 billion (3.2%) of the region's Gross Value Add – nearly 90% of which is delivered directly by our Accommodation, Food Service, Retail, Transport and Education establishments.



#### Sydney Surrounds North Industry share of Direct Tourism GVA (\$m)



According to the Deloitte 2015-2020 Tourism Labour Force survey, over 78% of tourism job vacancies are filled by local residents of the area where the business is located.

It is estimated that NSW has a 10% vacancy rate in tourism jobs.

### TOURISM SUPPLY

Establishments with 10 rooms or more

		SUPPLY			DEMAND		REVENUE		
YE		Establishments no.	Rooms no.	Room nights available (000) no.	Room nights occupied (000) no.	Room occupancy rate	Takings from accommodation \$ millions	Average daily rate \$	Revenue per available room \$
Sydney Surrounds	Dec-2018	259	12,742	4,651	3,335	71.7%	692	208	149
North	%Ch on 2017	-0.7%	-0.2%	-0.2%	1.0%	1.2%	2.0%	1.0%	2.2%

Sydney Surrounds North has over 250 accommodation establishments with a room stock of more than 12,700 (for establishments with ten rooms or more).



Domestic direct inbound seats and flights have decreased in 2018 with a total of 7,274 flights (-20.2% yoy) delivering 848,801 seats (-5.2% yoy).

Note: Gross Value Added (GVA), Tourism Jobs and Businesses and Accommodation are only available by tourism region. GVA was estimated based on visitor expenditure share while Tourism Jobs and Businesses and Accommodation for the DN were estimated based on visitor number share of the tourism regions within each DN.

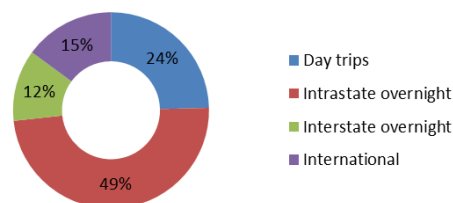
# Sydney Surrounds North DN is **NSW's top ranked DN** in terms of Visitor expenditure per day!

## ECONOMIC VALUE OF TOURISM

In terms of what is consumed by Tourism, Sydney Surrounds North DN represents about 14% of the state's Total Tourism Consumption. This is mostly delivered by Intrastate tourism to the Region.

Sydney Surrounds North has a substantial Domestic tourism market and a healthy International market.

Sydney Surrounds North \$5.6 b  
Share of DN consumption



Sydney Surrounds North DN visitation has grown over 34% since 2012 in terms of visitor expenditure value.

## SYDNEY SURROUNDS NORTH DN TOTAL

21,560

VISITORS IN SSN (000)



22,117

NIGHTS IN SSN (000)



4,626

Expenditure IN SSN (\$M)



## TRAVEL TYPE

## ORIGIN

### International Overnight



380

VISITORS IN SSN (000)



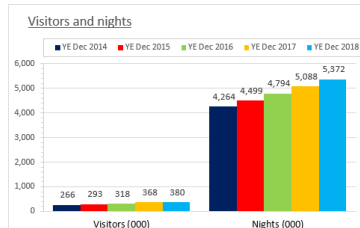
5,372

NIGHTS IN SSN (000)



369

EXPENDITURE IN SSN (\$M)



Share of International visitors to Sydney Surrounds North DN			
Rank	Individual market	YE Dec 2017	YE Dec 2018
1	United Kingdom	15.5%	16.1%
2	New Zealand	12.6%	11.9%
3	United States of America	9.7%	10.5%
4	China	6.9%	6.9%
5	Germany	5.4%	5.9%

Origin Region	YE Dec 2017	YE Dec 2018
Europe	38.3%	37.7%
Asia	28.6%	31.8%
North America	14.3%	13.2%
Other Countries	18.9%	17.3%

### Domestic Overnight



6,326

VISITORS IN SSN (000)



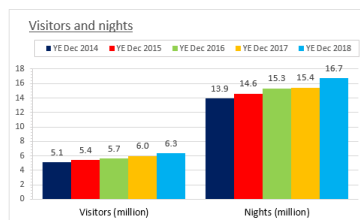
16,745

NIGHTS IN SSN (000)



2,707

EXPENDITURE IN SSN (\$M)



Origin	Share of Visitors		Share of Nights	
	YE Dec 2017	YE Dec 2018	YE Dec 2017	YE Dec 2018
Sydney	49.5%	50.5%	44.7%	43.3%
Regional NSW	34.9%	33.0%	32.4%	32.4%
Total Intrastate	84.5%	83.5%	77.1%	75.7%
Queensland	6.2%	7.1%	9.4%	11.0%
Victoria	4.9%	4.6%	6.3%	5.6%
ACT	2.2%	2.7%	2.3%	2.8%
Other Interstate	2.3%	2.1%	4.8%	5.0%
Total Interstate	15.5%	16.5%	22.9%	24.3%

### Domestic Daytrip



14,854

VISITORS IN SSN (000)



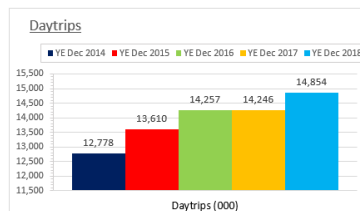
n/a

NIGHTS IN SSN (000)



1,550

EXPENDITURE IN SSN (\$M)



Origin of domestic daytrip visitors to Sydney Surrounds North DN	
YE Dec 2018	Visitors (000)
Intrastate	14,769
Interstate	*
Total	14,854



### HUNTER

10,269

VISITORS IN SSN  
(000)



12,876

NIGHTS IN SSN  
(000)



2,474

EXPENDITURE IN SSN  
(\$M)



### CENTRAL COAST

4,923

VISITORS IN SSN  
(000)



4,260

NIGHTS IN SSN  
(000)



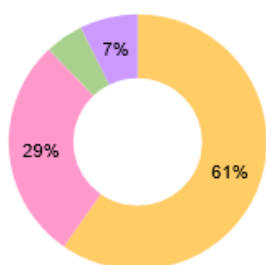
833

EXPENDITURE IN SSN  
(\$M)



Note: Purpose of visit shares provided only when statistically reliable

### TRAVEL TYPE



■ Holiday  
■ VFR  
■ Business  
■ Other

185  
VISITORS IN SSN  
(000)



International Overnight

3,066  
NIGHTS IN SSN  
(000)



182  
EXPENDITURE IN SSN  
(\$M)



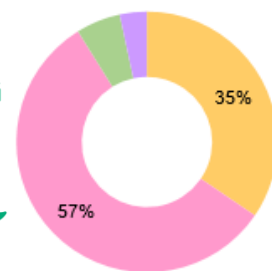
61  
VISITORS IN SSN  
(000)



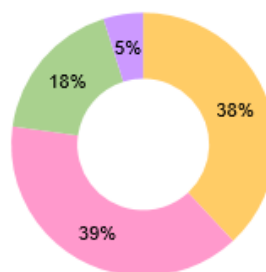
755  
NIGHTS IN SSN  
(000)



40  
EXPENDITURE IN SSN  
(\$M)



■ Holiday  
■ VFR  
■ Business  
■ Other



■ Holiday  
■ VFR  
■ Business  
■ Other

3,586  
VISITORS IN SSN  
(000)



Domestic Overnight

9,810  
NIGHTS IN SSN  
(000)



1,583  
EXPENDITURE IN SSN  
(\$M)



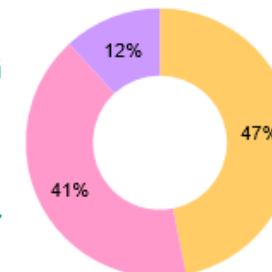
1,314  
VISITORS IN SSN  
(000)



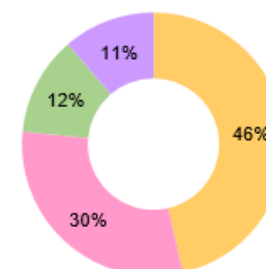
3,505  
NIGHTS IN SSN  
(000)



497  
EXPENDITURE IN SSN  
(\$M)



■ Holiday  
■ VFR  
■ Business  
■ Other



■ Holiday  
■ VFR  
■ Business  
■ Other

6,498  
VISITORS IN SSN  
(000)



Domestic Daytrip

n/a  
NIGHTS IN SSN  
(000)



708  
EXPENDITURE IN SSN  
(\$M)



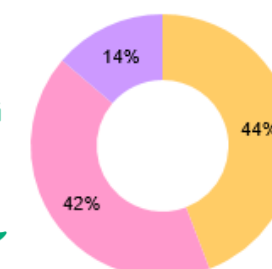
3,549  
VISITORS IN SSN  
(000)



n/a  
NIGHTS IN SSN  
(000)



297  
EXPENDITURE IN SSN  
(\$M)



■ Holiday  
■ VFR  
■ Business  
■ Other



### BLUE MOUNTAINS

**3,412**

VISITORS IN SSN  
(000)



**2,263**

NIGHTS IN SSN  
(000)



**576**

EXPENDITURE IN SSN  
(\$M)



### SYDNEY

**2,608**

VISITORS IN SSN  
(000)



**2,224**

NIGHTS IN SSN  
(000)



**704**

EXPENDITURE IN SSN  
(\$M)



Note: Purpose of visit shares provided only when statistically reliable

### TRAVEL TYPE

#### International Overnight



**112**

VISITORS IN SSN  
(000)



**473**

NIGHTS IN SSN  
(000)



**34**

EXPENDITURE IN SSN  
(\$M)



**41**

VISITORS IN SSN  
(000)



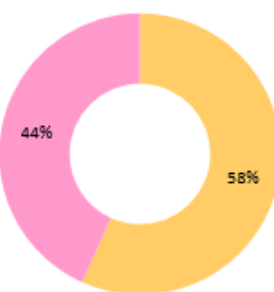
**1,017**

NIGHTS IN SSN  
(000)



**114**

EXPENDITURE IN SSN  
(\$M)



■ VFR  
■ Other

#### Domestic Overnight



**841**

VISITORS IN SSN  
(000)



**1,790**

NIGHTS IN SSN  
(000)



**276**

EXPENDITURE IN SSN  
(\$M)



**479**

VISITORS IN SSN  
(000)



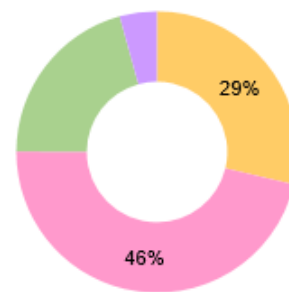
**1,207**

NIGHTS IN SSN  
(000)



**354**

EXPENDITURE IN SSN  
(\$M)



■ Holiday  
■ VFR  
■ Business  
■ Other

#### Domestic Daytrip



**2,459**

VISITORS IN SSN  
(000)



**n/a**

NIGHTS IN SSN  
(000)



**266**

EXPENDITURE IN SSN  
(\$M)



**2,089**

VISITORS IN SSN  
(000)



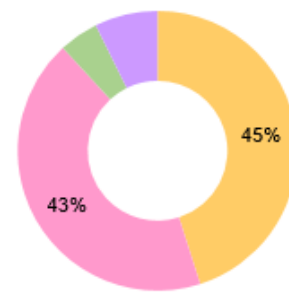
**n/a**

NIGHTS IN SSN  
(000)



**236**

EXPENDITURE IN SSN  
(\$M)



■ Holiday  
■ VFR  
■ Business  
■ Other



Events deliver visitors, visitor nights and visitor spend into  
Sydney Surrounds North DN

Since 2011, NSW has secured events that have and will deliver over \$3.5 billion worth of visitor expenditure into the state.



SYDNEY SURROUNDS NORTH DN EVENTS DELIVERED...

Domestic Overnight



365

VISITORS IN SSN  
(000)



871

NIGHTS IN SSN  
(000)



220

EXPENDITURE IN SSN  
(\$M)



Domestic Daytrip



944

VISITORS IN SSN  
(000)



n/a

NIGHTS IN SSN  
(000)



94

EXPENDITURE IN SSN  
(\$M)



International event visitor data in Sydney Surrounds DN are available but not statistically reliable.

SAMPLE OF SYDNEY SURROUNDS NORTH EVENTS

LARGE SCALE

Surfest (Pro Event)  
Nudie Australian Boardriders Battle National Final  
Sydney International Rowing Regatta  
Newcastle International Supermoto  
Ballet Under the Stars  
NSW Open Golf Championship  
Port Stephens NSW Pro  
Coates Hire Newcastle 500

OTHER

Sail Port Stephens  
Port to Port MTB  
Australian National Budgerigar Council Championships  
Obstacle Course Racing World Championships Long  
Course 2018  
Girrakool Blues Festival & BBQ  
Ultra Trail Australia  
Harvest Festival  
Love Seafood Love Port Stephens 2018





## What **experiences** drive visitors to come to your destination?

More than 75%  
of the group  
participate

50%-75% of  
the group  
participate

25%-50% of  
the group  
participate



International  
Visitors



Domestic  
Overnight  
Visitors



Daytrip  
Visitors

Attend aboriginal performance	4%	n/a	n/a
Attend an organised sporting event	9%	2%	*
Attend festivals / fairs or cultural events	16%	*	*
Attend movies/cinema	19%	*	*
Attend theatre, concerts or other performing arts	13%	*	*
Bushwalking / rainforest walks	42%	17%	10%
Charter boat / cruise / ferry	35%	*	*
Cycling	8%	*	*
Eat out / dine at a restaurant and/or cafe	89%	61%	50%
Exercise, gym or swimming	n/a	7%	4%
Experience aboriginal art / craft and cultural displays	14%	*	*
Fishing	5%	4%	*
Go on a daytrip to another place	n/a	4%	n/a
Go on guided tours or excursions	19%	*	*
Go shopping for pleasure	73%	18%	17%
Go to markets	47%	6%	*
Go to the beach	74%	27%	10%
Go whale or dolphin watching	14%	*	*
Golf	3%	2%	*
Movies/videos	n/a	*	*
Other outdoor activities nfd	10%	4%	*
Picnics or BBQs	n/a	5%	4%
Play other sports	6%	3%	*
Pubs, clubs, discos etc	46%	21%	8%
Sailing, windsurfing, kayaking	8%	n/a	n/a
Scuba diving	5%	*	n/a
Short educational course	*	n/a	n/a
Sightseeing/looking around	76%	25%	18%
Snorkelling	15%	*	n/a
Surfing	10%	*	*
Tourist trains	9%	*	*
Visit a health spa / sanctuary / well-being centre	4%	*	*
Visit a reef	14%	n/a	n/a
Visit amusements / theme parks	8%	*	*
Visit an aboriginal site / community	8%	*	*
Visit art / craft workshops / studios	9%	*	*
Visit botanical or other public gardens	46%	3%	*
Visit breweries or distilleries	8%	*	*
Visit casinos	10%	*	n/a
Visit farmgates	6%	*	*
Visit farms	15%	*	*
Visit food markets	n/a	*	*
Visit friends & relatives	n/a	47%	37%
Visit history / heritage buildings, sites or monuments	43%	4%	*
Visit industrial tourist attractions / mines / breweries	n/a	*	*
Visit museums or art galleries	37%	3%	*
Visit national parks / state parks	62%	15%	11%
Visit wildlife parks / zoos / aquariums	42%	*	*
Visit wineries	18%	5%	*
Water activities / sports	n/a	3%	*

Note:

Items with an asterisk \* are available but not statistically reliable  
Items with n/a means data are not available.

## Is your region getting its **share** of the **Visitor/Tourism economy**?

### Sydney Surrounds North DN TOTAL

**21,560**

VISITORS IN SSN  
(000)



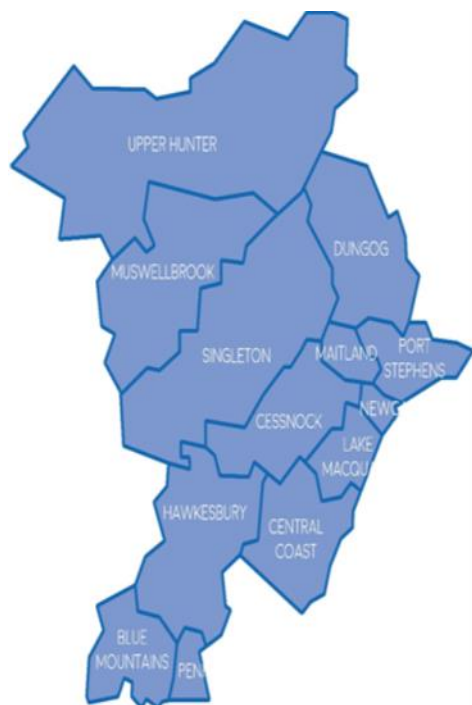
**22,117**

NIGHTS IN SSN  
(000)



**4,626**

Expenditure IN SSN  
(\$M)



### SYDNEY

TOTAL SYDNEY	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	2,608	41	479	2,089
Share of SSN %	12%	11%	8%	14%
Nights (000)	2,224	1,017	1,207	
Share of SSN %	10%	19%	7%	

Hawkesbury (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,049	15	202	831
Share of SSN %	5%	4%	3%	6%
Nights (000)	697	260	437	
Share of SSN %	3%	5%	3%	

Penrith (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,474	26	266	1,182
Share of SSN %	7%	7%	4%	8%
Nights (000)	1,512	757	756	
Share of SSN %	7%	14%	5%	

Other areas that make up Sydney TR include other unclassified areas in the region.

### CENTRAL COAST

### BLUE MOUNTAINS

TOTAL CENTRAL COAST	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	4,923	61	1,314	3,549
Share of SSN %	23%	16%	21%	24%
Nights (000)	4,260	755	3,505	
Share of SSN %	19%	14%	21%	

TOTAL BLUE MOUNTAINS	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	3,412	112	841	2,459
Share of SSN %	16%	30%	13%	17%
Nights (000)	2,263	473	1,790	
Share of SSN %	10%	9%	11%	

Central Coast (C) (NSW)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	4,923	61	1,314	3,549
Share of SSN %	23%	16%	21%	24%
Nights (000)	4,260	755	3,505	
Share of SSN %	19%	14%	21%	

Blue Mountains (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	3,412	112	841	2,459
Share of SSN %	16%	30%	13%	17%
Nights (000)	2,263	473	1,790	
Share of SSN %	10%	9%	11%	



## Is your region getting its **share** of the **Visitor/Tourism economy**?

### Sydney Surrounds North DN TOTAL

**21,560**

VISITORS IN SSN  
(000)



**22,117**

NIGHTS IN SSN  
(000)



**4,626**

Expenditure IN SSN  
(\$M)



Dungog (A)	Total Tourism
Visitors (000)	269
Share of SSN %	1%
Nights (000)	197
Share of SSN %	1%

Muswellbrook (A)	Total Tourism
Visitors (000)	334
Share of SSN %	2%
Nights (000)	317
Share of SSN %	1%

Singleton (A)	Total Tourism
Visitors (000)	533
Share of SSN %	2%
Nights (000)	721
Share of SSN %	3%

### HUNTER

TOTAL HUNTER	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	10,269	185	3,586	6,498
Share of SSN %	48%	49%	57%	44%
Nights (000)	12,876	3,066	9,810	
Share of SSN %	58%	57%	59%	

Cessnock (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,018	15	429	574
Share of SSN %	5%	4%	7%	4%
Nights (000)	1,058	113	945	
Share of SSN %	5%	2%	6%	

Lake Macquarie (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,306	14	403	889
Share of SSN %	6%	4%	6%	6%
Nights (000)	1,317	185	1,132	
Share of SSN %	6%	3%	7%	

Newcastle (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	4,368	105	1,446	2,818
Share of SSN %	20%	27%	23%	19%
Nights (000)	5,769	2,062	3,707	
Share of SSN %	26%	38%	22%	

Port Stephens (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,504	49	679	776
Share of SSN %	7%	13%	11%	5%
Nights (000)	2,266	186	2,080	
Share of SSN %	10%	3%	12%	

Maitland (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	754	*	172	579
Share of SSN %	3%	*	3%	4%
Nights (000)	870	*	467	
Share of SSN %	4%	*	3%	

Upper Hunter Shire (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	262	*	113	*
Share of SSN %	1%	*	2%	*
Nights (000)	361	*	288	
Share of SSN %	2%	*	2%	

Data for Individual markets for Dungog, Muswellbrook and Singleton LGAs are available but not statistically reliable.



**Sydney Surrounds North DN overnight expenditure to grow by \$775.4M to \$3.5B over the next 10 years!**

### TOTAL VISITOR NIGHTS IN NEW SOUTH WALES

	Purpose of visit				Holiday		VFR <sup>a</sup>		Business		Other		All purpose		State total
	Holiday	VFR <sup>a</sup>	Business	Other <sup>c</sup>	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	
	Year-on-year change (%)														
2017-18	6.8	3.5	1.7	4.7	9.3	5.0	6.3	0.7	1.3	2.1	6.2	-0.9	6.6	2.6	4.8
2018-19	3.8	4.3	3.7	6.2	5.7	2.4	5.9	2.7	3.0	4.5	6.3	6.0	5.7	3.1	4.5
2019-20	3.5	4.5	3.8	5.0	5.2	2.1	6.0	2.8	4.1	3.6	5.2	4.2	5.3	2.7	4.2
2020-21	3.2	4.2	3.2	5.0	4.7	1.9	5.8	2.5	3.0	3.4	5.1	4.4	5.0	2.5	3.9
2021-22	3.4	4.0	3.3	4.8	5.2	1.9	5.3	2.4	3.1	3.5	5.0	4.1	4.9	2.5	3.9
	5-year average annual growth rate (%)														
2016/17-2021/22	4.1	4.1	3.1	5.2	6.0	2.6	5.9	2.2	2.9	3.4	5.6	3.5	5.5	2.7	4.3
2021/22-2026/27	3.3	4.0	3.2	4.5	5.0	1.8	5.4	2.3	3.1	3.3	4.7	3.9	4.8	2.4	3.8
	10-year average annual growth rate (%)														
2016/17-2026/27	3.7	4.1	3.2	4.8	5.5	2.2	5.6	2.3	3.0	3.4	5.1	3.7	5.2	2.5	4.1

According to Tourism Research Australia's latest State Nights forecast, Tourism Nights in Regional NSW is expected to grow by 2.5% pa over the next 10 years.

Should this hold true and Sydney Surrounds North DN's share of state hold constant, then the value of Overnight Visitor expenditure in the region could reach \$3.5 billion by 2026 / 27 from \$2.8 billion in 2016/17.\*

### INBOUND VISITOR NIGHTS IN NEW SOUTH WALES

2017-18 2018-19 2019-20 2020-21 2021-22  2016/17-2021/22 2021/22-2026/27  2016/17-2026/27	Purpose of visit				Holiday		VFR <sup>b</sup>		Business		Other		All purpose		
	Holiday <sup>a</sup>	VFR <sup>b</sup>	Business	Other <sup>c</sup>	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	State total
	Year-on-year change (%)														
	11.0	9.5	7.3	7.3	10.9	11.9	8.7	13.2	9.6	-6.5	7.4	6.3	8.8	9.8	9.0
	6.4	7.4	1.9	6.3	6.6	5.4	7.9	5.5	0.8	9.9	6.3	6.1	6.6	5.8	6.5
	5.9	7.7	5.9	5.1	6.0	5.1	8.0	6.5	6.3	3.0	5.2	4.5	6.2	5.3	6.0
	5.2	7.2	2.3	5.2	5.4	4.4	7.7	5.3	2.4	1.5	5.2	5.0	5.7	4.8	5.6
	5.8	6.6	3.0	4.9	6.0	5.0	6.9	5.2	2.8	4.7	5.0	4.3	5.7	4.8	5.6
	5-year average annual growth rate (%)														
	6.8	7.7	4.1	5.8	7.0	6.3	7.8	7.1	4.3	2.4	5.8	5.2	6.6	6.1	6.5
5.6	6.5	3.2	4.6	5.8	4.8	6.8	5.1	3.3	2.9	4.7	4.2	5.5	4.7	5.4	
10-year average annual growth rate (%)															
6.2	7.1	3.6	5.2	6.4	5.6	7.3	6.1	3.8	2.6	5.3	4.7	6.1	5.4	5.9	

### DOMESTIC VISITOR NIGHTS IN NEW SOUTH WALES

	Purpose of visit				Holiday		VFR <sup>b</sup>		Business		Other		All purpose		
	Holiday	VFR <sup>b</sup>	Business	Other <sup>c</sup>	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	State total
	Year-on-year change (%)														
2017-18	4.0	-0.5	0.5	-8.1	3.9	4.0	2.1	-1.6	-1.8	2.5	-7.3	-8.6	0.4	1.1	0.9
2018-19	2.0	2.1	4.1	5.8	2.3	1.9	2.0	2.1	3.9	4.3	5.8	5.9	3.0	2.5	2.6
2019-20	1.6	2.0	3.4	4.1	1.9	1.6	2.0	2.1	3.2	3.6	4.6	3.8	2.6	2.1	2.2
2020-21	1.6	1.8	3.4	4.1	1.8	1.5	1.7	1.8	3.2	3.5	4.5	3.7	2.5	2.0	2.1
2021-22	1.4	1.8	3.3	4.0	1.7	1.4	1.7	1.8	3.2	3.5	4.4	3.7	2.4	1.9	2.1
	5-year average annual growth rate (%)														
2016/17-2021/22	2.1	1.4	3.0	1.8	2.3	2.1	1.9	1.2	2.3	3.5	2.3	1.6	2.2	1.9	2.0
2021/22-2026/27	1.2	1.6	3.2	3.8	1.4	1.2	1.6	1.7	3.1	3.3	4.2	3.5	2.3	1.8	1.9
	10-year average annual growth rate (%)														
2016/17-2026/27	1.7	1.5	3.1	2.8	1.9	1.6	1.7	1.4	2.7	3.4	3.2	2.5	2.2	1.9	2.0

\* Modelled on TRA inbound and domestic 10 year CAGR against a static share of visitor night for Sydney Surrounds North DN. 2.5% CPI included.

Source: Tourism Research Australia, International & National Visitor Surveys

Note: Tourism Forecasts are only available for NSW, Sydney and total Regional NSW. Forecasts for the DNs were estimated based on visitor nights and expenditure per night of the tourism regions within each DN.