



Destination
Sydney Surrounds North

The Value of Tourism to Sydney Surrounds North 2019



**Every minute of every day,
Tourism delivers \$10,079
of visitor spend into
Sydney Surrounds North**

**That is almost \$14.5 million per day!!
A value that has grown by 12.4%
in the last year alone.**

Tourism delivers **4.9%** of our jobs, supports **14,762** businesses and directly delivers **3.1%** of our region's Gross Value Add (GVA) which has grown every year since 2010/11 at an average **4.5%** pa.

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

The NSW Visitor Economy (3.0% direct share of state GVA) is worth more than Agriculture, Forestry and Fishing combined (1.6% share of state total) and scores just below Mining (3.3% 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 (\$25.8 billion)
2. Tourism (\$21.6 billion)
3. Manufacturing (\$13.4 billion)

EMPLOYMENT DUE TO TOURISM

Tourism's DIRECT Contribution to Employment

FULL TIME 14,728

PART TIME 16,506

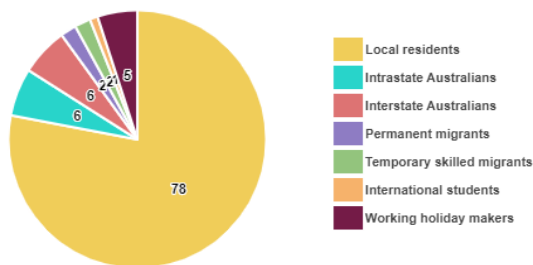


Supporting our local economy, Tourism supplies 4.9% of the region's employment including 31,215 persons who are directly employed and a further 13,442 who are indirectly employed.

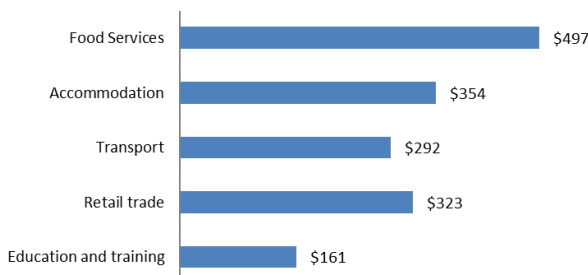
There are 14,762 tourism related businesses in Sydney Surrounds North DN, around 37% of all Regional NSW Tourism businesses.

BUSINESSES RELYING ON TOURISM

Economically, tourism businesses directly deliver over \$2.0 billion (3.1%) of the region's GVA - over 80% of which is delivered 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

YE	SUPPLY			DEMAND		REVENUE			
	Establishments	Rooms	Room nights available (000)	Room nights occupied (000)	Room occupancy rate	Takings from accommodation	Average daily rate	Revenue per available room	
	no.	no.	no.	no.		\$ millions	\$	\$	
Sydney Surrounds	263	11,366	4,136	2,724	65.9%	484	178	117	
North	%Ch on 2018	0.8%	1.5%	2.8%	2.6%	-0.2ppts*	1.4%	-1.1%	-1.4%

*percentage point change

Sydney Surrounds North DN has over 260 accommodation establishments with a room stock of more than 11,300 (for establishments with ten rooms or more).



Domestic direct inbound flights have increased in 2019 with a total of 7,357 flights (+1.1% yoy) but delivered a decrease in seats with a total of 830,901 (-2.1% yoy).

Note: Gross Value Added (GVA), Tourism Jobs and Businesses data are only available by tourism region. GVA was estimated based on visitor expenditure share while Tourism Jobs and Businesses were estimated based on visitor number share of the tourism regions within each DN in 2019.

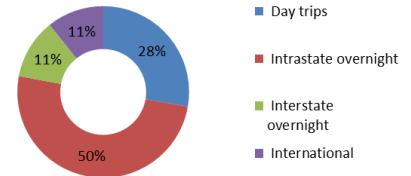
Sydney Surrounds North DN is **NSW's top ranked DN** in terms of Visitor expenditure per day!

ECONOMIC VALUE OF TOURISM

In terms of what is consumed by Tourism, Sydney Surrounds North DN represents about 13% 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 \$6.0 b Share of DN consumption



Sydney Surrounds North DN visitation has grown nearly 29% since 2016 in terms of visitor expenditure value.

SYDNEY SURROUNDS NORTH DN TOTAL

26,357

VISITORS IN SSN (000)



25,217

NIGHTS IN SSN (000)



5,298

Expenditure IN SSN (\$M)



TRAVEL TYPE

International Overnight

360

VISITORS IN SSN (000)



4,672

NIGHTS IN SSN (000)

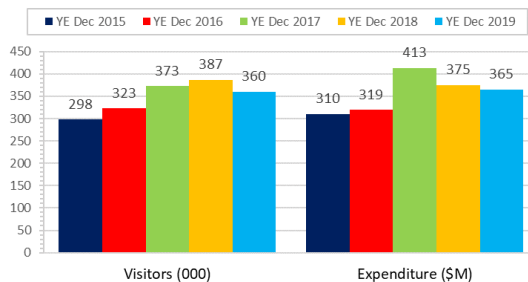


365

EXPENDITURE IN SSN (\$M)



Visitors and Expenditure



ORIGIN

Top Origin	Share of Visitors		Share of Expenditure	
	YE Dec 2018	YE Dec 2019	YE Dec 2018	YE Dec 2019
UK	16.0%	14.8%	9.2%	10.1%
New Zealand	11.9%	11.0%	7.9%	5.9%
USA	10.3%	9.4%	5.6%	6.0%
China	7.0%	7.7%	20.0%	24.4%
Germany	5.8%	7.2%	2.5%	2.3%

Origin Region	Share of Visitors	
	YE Dec 2018	YE Dec 2019
Europe	37.4%	38.8%
Asia	32.0%	31.0%
North America	13.0%	12.7%
Other Countries	17.5%	17.5%

Domestic Overnight

7,868

VISITORS IN SSN (000)



20,545

NIGHTS IN SSN (000)

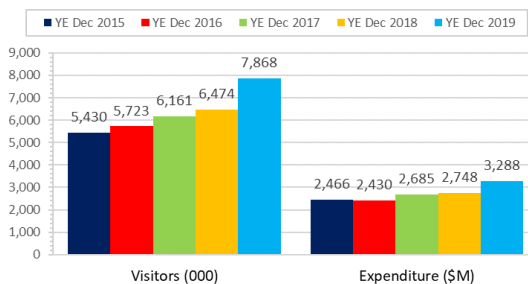


3,288

EXPENDITURE IN SSN (\$M)



Visitors and Expenditure



Origin	Share of Visitors		Share of Expenditure	
	YE Dec 2018	YE Dec 2019	YE Dec 2018	YE Dec 2019
Sydney	51.4%	50.3%	44.9%	43.6%
Regional NSW	32.6%	34.3%	33.7%	34.3%
Total Intrastate	84.0%	84.6%	78.6%	77.9%
Queensland	6.8%	6.5%	8.4%	9.0%
Victoria	4.6%	4.9%	6.2%	7.0%
ACT	2.7%	1.7%	2.1%	2.4%
Other States	2.0%	2.3%	4.8%	3.7%
Total Interstate	16.0%	15.4%	21.4%	22.1%

Domestic Daytrip

18,129

VISITORS IN SSN (000)

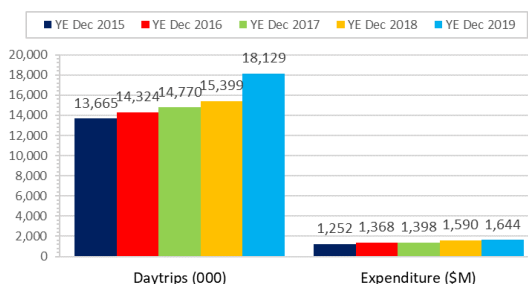


1,644

EXPENDITURE IN SSN (\$M)



Daytrips and Expenditure



HUNTER

CENTRAL COAST

12,518

VISITORS IN SSN (000)



13,924

NIGHTS IN SSN (000)



2,929

EXPENDITURE IN SSN (\$M)



6,570

VISITORS IN SSN (000)



5,692

NIGHTS IN SSN (000)



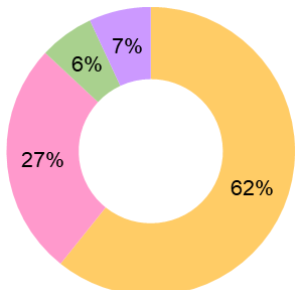
1,077

EXPENDITURE IN SSN (\$M)



Note: Purpose of visit shares provided only when statistically reliable

TRAVEL TYPE



177

VISITORS IN SSN (000)



International Overnight



2,496

NIGHTS IN SSN (000)



210

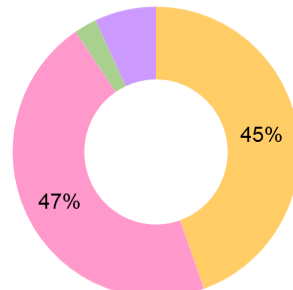
EXPENDITURE IN SSN (\$M)



- Holiday
- VFR
- Business
- Other

55

VISITORS IN SSN (000)



745

NIGHTS IN SSN (000)

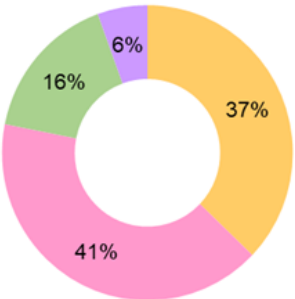


42

EXPENDITURE IN SSN (\$M)



- Holiday
- VFR
- Business
- Other



4,268

VISITORS IN SSN (000)



Domestic Overnight



11,428

NIGHTS IN SSN (000)



1,919

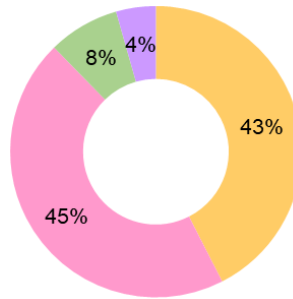
EXPENDITURE IN SSN (\$M)



- Holiday
- VFR
- Business
- Other

1,887

VISITORS IN SSN (000)



4,947

NIGHTS IN SSN (000)

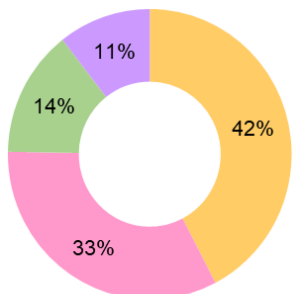


677

EXPENDITURE IN SSN (\$M)



- Holiday
- VFR
- Business
- Other



8,073

VISITORS IN SSN (000)



Domestic Daytrip



800

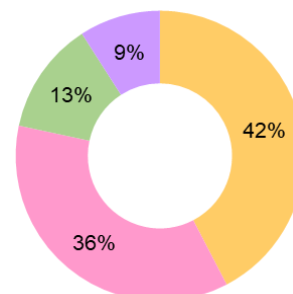
EXPENDITURE IN SSN (\$M)



- Holiday
- VFR
- Business
- Other

4,628

VISITORS IN SSN (000)



357

EXPENDITURE IN SSN (\$M)



- Holiday
- VFR
- Business
- Other



BLUE MOUNTAINS

SYDNEY

3,675

VISITORS IN SSN (000)



2,596

NIGHTS IN SSN (000)



642

EXPENDITURE IN SSN (\$M)



2,879

VISITORS IN SSN (000)



2,221

NIGHTS IN SSN (000)



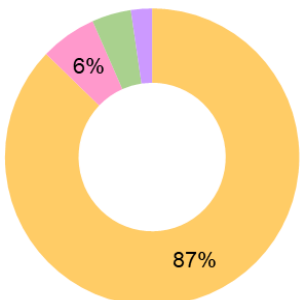
408

EXPENDITURE IN SSN (\$M)



Note: Purpose of visit shares provided only when statistically reliable

TRAVEL TYPE



- Holiday
- VFR
- Business
- Other

108

VISITORS IN SSN (000)



446

NIGHTS IN SSN (000)



50

EXPENDITURE IN SSN (\$M)



International Overnight



32

VISITORS IN SSN (000)



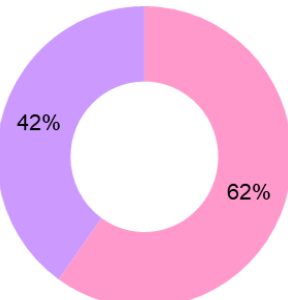
897

NIGHTS IN SSN (000)

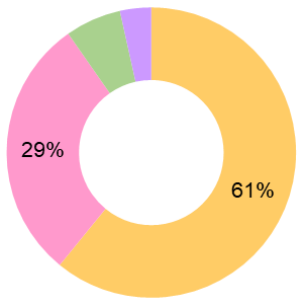


50

EXPENDITURE IN SSN (\$M)



- VFR
- Other



- Holiday
- VFR
- Business
- Other

968

VISITORS IN SSN (000)



2,150

NIGHTS IN SSN (000)



345

EXPENDITURE IN SSN (\$M)



Domestic Overnight



573

VISITORS IN SSN (000)



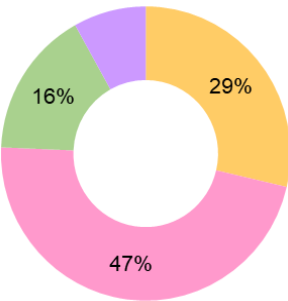
1,324

NIGHTS IN SSN (000)

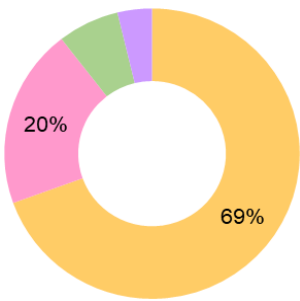


174

EXPENDITURE IN SSN (\$M)



- Holiday
- VFR
- Business
- Other



- Holiday
- VFR
- Business
- Other

2,600

VISITORS IN SSN (000)



247

EXPENDITURE IN SSN (\$M)



Domestic Daytrip



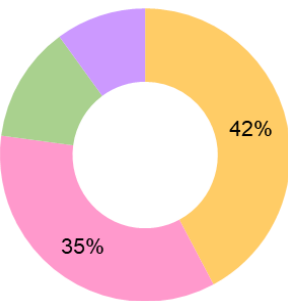
2,274

VISITORS IN SSN (000)



184

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



334

VISITORS IN SSN
(000)



697

NIGHTS IN SSN
(000)



189

EXPENDITURE IN SSN
(\$M)



Domestic Daytrip



1,001

VISITORS IN SSN
(000)



107

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

- Australian Boardriders Battle National Final
- Coates Hire Newcastle 500
- Port to Port
- Rugby Test Match: Wallaroos v Japan (Women's)
- Sail Port Stephens
- Superboats Festival Weekend
- Surfest
- Vissla NSW Pro Surf Series - Vissla Central Coast Pro

OTHER

- Harvest Festival
- Love Sea Food
- Newcastle Writers Festival
- Riverlights Multicultural Festival
- Sculpture at Scenic World
- Sculpture on the Farm





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



Note: Activities of International visitors were undertaken in Australia, not necessarily in NSW

	International Visitors	Domestic Overnight Visitors	Daytrip Visitors
Attend a aboriginal performance	4%	n/a	n/a
Attend an organised sporting event	7%	2%	3%
Attend festivals / fairs or cultural events	15%	2%	*
Attend movies/cinema	17%	1%	*
Attend theatre, concerts or other performing arts	11%	2%	*
Birdwatching	12%	*	*
Bushwalking / rainforest walks	43%	15%	9%
Charter boat / cruise / ferry	30%	*	*
Cycling	8%	2%	*
Eat out / dine at a restaurant and/or cafe	93%	62%	50%
Exercise, gym or swimming	n/a	8%	4%
Experience aboriginal art / craft and cultural displays	15%	*	*
Fishing	5%	3%	*
Go on a daytrip to another place	n/a	3%	n/a
Go on guided tours or excursions	19%	*	*
Go shopping for pleasure	76%	15%	13%
Go to markets	46%	5%	2%
Go to the beach	76%	29%	13%
Go whale or dolphin watching	17%	*	*
Golf	4%	2%	*
Other outdoor activities nfd	11%	3%	2%
Picnics or BBQs	n/a	5%	3%
Play other sports	5%	3%	2%
Pubs, clubs, discos etc	48%	22%	8%
Sailing, windsurfing, kayaking	9%	n/a	n/a
Scuba diving	5%	n/a	n/a
Short educational course	1%	n/a	n/a
Sightseeing/looking around	77%	24%	19%
Snorkelling	16%	*	*
Surfing	12%	1%	*
Tourist trains	7%	*	*
Visit a health spa / sanctuary / well-being centre	3%	*	*
Visit amusements / theme parks	12%	*	*
Visit an aboriginal site / community	9%	*	*
Visit art / craft workshops / studios	9%	*	*
Visit botanical or other public gardens	48%	4%	3%
Visit breweries	8%	*	*
Visit casinos	10%	n/a	n/a
Visit distilleries	4%	*	n/a
Visit farmgates	6%	*	n/a
Visit farms	14%	*	*
Visit food markets	n/a	2%	*
Visit friends & relatives	n/a	49%	35%
Visit history/ heritage buildings, sites or monuments	42%	3%	3%
Visit museums or art galleries	39%	3%	*
Visit national parks / state parks	63%	13%	10%
Visit the reef	17%	*	*
Visit wildlife parks / zoos / aquariums	42%	*	*
Visit wineries	21%	6%	2%
Water activities / sports	n/a	4%	*
None of these	*	7%	13%

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**

26,357

VISITORS IN SSN (000)



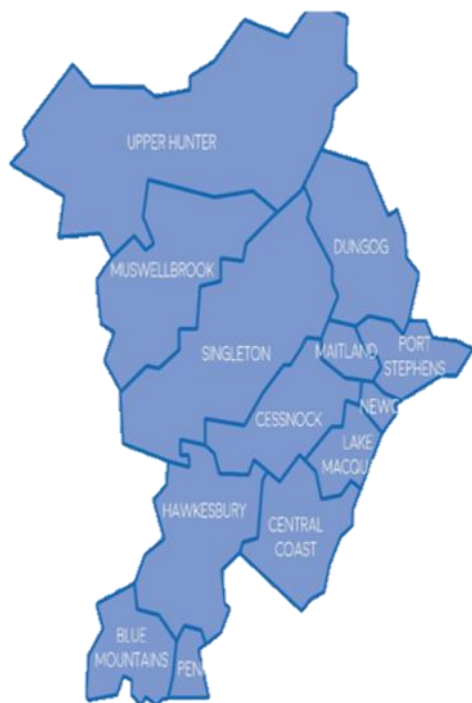
25,217

NIGHTS IN SSN (000)



5,298

Expenditure IN SSN (\$M)



SYDNEY

TOTAL SYDNEY	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	2,879	32	573	2,274
Share of SSN %	11%	9%	8%	13%
Expenditure (\$M)	408	50	174	184
Share of SSN %	8%	14%	6%	12%

Hawkesbury (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,177	6	270	900
Share of SSN %	5%	2%	4%	5%
Expenditure (\$M)	144	9	73	62
Share of SSN %	3%	3%	12%	14%

Penrith (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,627	26	294	1,307
Share of SSN %	6%	8%	4%	7%
Expenditure (\$M)	259	41	100	118
Share of SSN %	5%	12%	3%	7%

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)	6,570	55	1,887	4,628
Share of SSN %	26%	16%	25%	26%
Expenditure (\$M)	1,077	42	677	357
Share of SSN %	21%	12%	22%	23%

TOTAL BLUE MOUNTAINS	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	3,675	108	968	2,600
Share of SSN %	14%	32%	13%	15%
Expenditure (\$M)	642	50	345	247
Share of SSN %	13%	14%	11%	16%

Central Coast (C) (NSW)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	6,570	55	1,887	4,628
Share of SSN %	26%	16%	25%	26%
Expenditure (\$M)	1,077	42	677	357
Share of SSN %	21%	12%	22%	23%

Blue Mountains (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	3,675	108	968	2,600
Share of SSN %	14%	32%	13%	15%
Expenditure (\$M)	642	50	345	247
Share of SSN %	13%	14%	11%	16%



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

Sydney Surrounds North DN TOTAL

26,357

VISITORS IN SSN
(000)



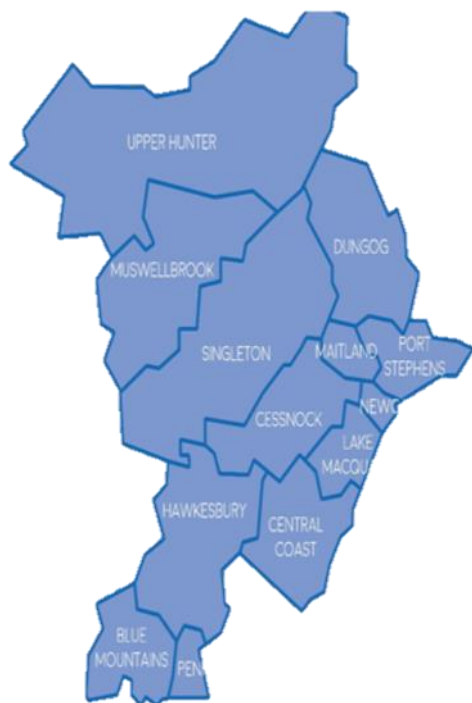
25,217

NIGHTS IN SSN
(000)



5,298

Expenditure IN SSN
(\$M)



Upper Hunter Shire (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	343	*	135	*
Share of SSN %	1%	*	2%	*
Expenditure (\$M)	75	*	59	*
Share of SSN %	1%	*	2%	*

Dungog A)	Total Tourism
Visitors (000)	163
Share of SSN %	1%
Expenditure (\$M)	24
Share of SSN %	0%

Data for Individual markets for Dungog are available but not statistically reliable.

HUNTER

TOTAL HUNTER	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	12,518	177	4,268	8,073
Share of SSN %	49%	52%	56%	46%
Expenditure (\$M)	2,929	210	1,919	800
Share of SSN %	58%	59%	62%	50%

Cessnock (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,013	10	394	609
Share of SSN %	4%	3%	5%	3%
Expenditure (\$M)	288	4	213	71
Share of SSN %	6%	1%	7%	4%

Lake Macquarie (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,554	11	563	980
Share of SSN %	6%	3%	7%	6%
Expenditure (\$M)	247	4	161	82
Share of SSN %	5%	1%	5%	5%

Maitland (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,141	*	238	897
Share of SSN %	4%	*	3%	5%
Expenditure (\$M)	122	*	55	65
Share of SSN %	2%	*	2%	4%

Newcastle (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	5,717	113	1,770	3,834
Share of SSN %	22%	33%	23%	22%
Expenditure (\$M)	1,358	176	741	440
Share of SSN %	27%	50%	24%	28%

Port Stephens (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,914	39	864	1,011
Share of SSN %	8%	11%	11%	6%
Expenditure (\$M)	675	11	572	92
Share of SSN %	13%	3%	18%	6%

Muswellbrook (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	313	*	120	192
Share of SSN %	1%	*	2%	1%
Expenditure (\$M)	66	*	47	17
Share of SSN %	1%	*	2%	1%

Singleton (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	458	*	207	247
Share of SSN %	2%	*	3%	1%
Expenditure (\$M)	75	*	54	15
Share of SSN %	1%	*	2%	1%