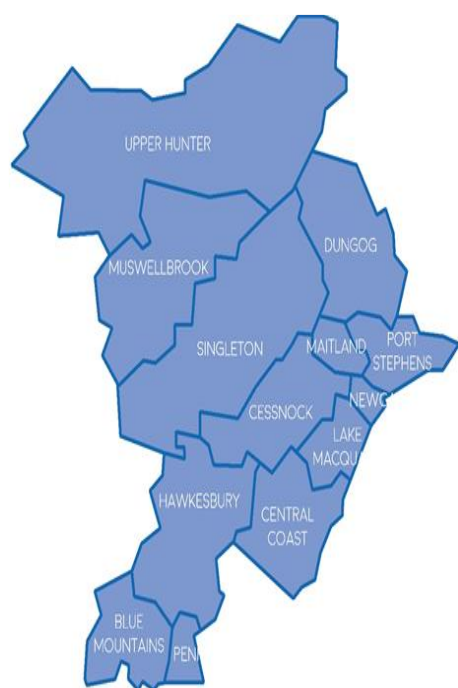




Destination  
Sydney Surrounds North

# The Value of Tourism to Sydney Surrounds North 2021



**Every minute of every day,  
Tourism delivers \$7,342  
of visitor spend into  
Sydney Surrounds North**

**That is over \$10.6 million per day!  
A value that has grown by 5.8%  
in the last year alone.**

*In March 2020 the Commonwealth Government closed its international borders due to the rapid spread of Covid-19 virus which had a devastating impact on the tourism industry in NSW and Australia. Domestic travel to NSW was constrained by Public Health Orders resulting in numerous lockdowns and restrictions on intrastate and interstate movement. As a result, **International visitation** to the **Sydney Surrounds North Destination Network (DN)** for the year ended (YE) December 2021 cannot be shown individually in this booklet due to small sample size (which means that data is not statistically reliable).*

**This year the number of total visitors to the Sydney Surrounds North DN is 15.8 million or 40 per cent below the pre-Covid period (year 2019), and 10 per cent below the 2020 visitation level.**



Tourism delivers **4.5%** of our jobs, supports **15,766** businesses and directly delivers **2.5%** of our region's Gross Value Add (GVA) which has grown every year since 2010/11 at an average **1.7%** pa.

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

The NSW Visitor Economy (2.4% direct share of state GVA) is worth more than Agriculture, Forestry and Fishing combined (1.4% share of state total) and scores just below Mining (2.5% share of state total) in contribution to NSW.

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

1. Mining (\$21.2 billion)
2. Tourism (\$18.8 billion)
3. Manufacturing (\$13.2 billion)

## EMPLOYMENT DUE TO TOURISM

### Tourism's DIRECT Contribution to Employment

FULL TIME 12,731

PART TIME 15,570

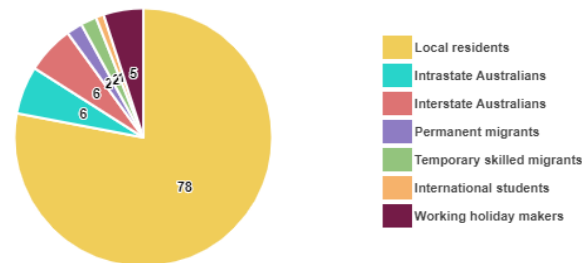


Supporting our local economy, Tourism supplies 4.5% of the region's employment including 28,301 persons who are directly employed and a further 10,354 who are indirectly employed.

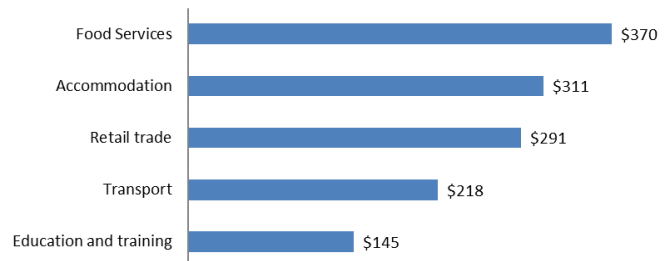
There are 15,766 tourism related businesses in Sydney Surrounds North DN, around 37% of all Regional NSW Tourism businesses.

## BUSINESSES RELYING ON TOURISM

Economically, tourism businesses directly deliver \$1.7 billion (2.5%) 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

Year ended	SUPPLY			DEMAND		REVENUE		
	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 North Dec-2021	270	11,570	4,222	1,918	45.4%	399	208	95
%Ch on 2020	-0.4%	0.6%	2.3%	-8.7%	-5.5ppts*	4.0%	14.0%	1.7%

\*percentage point change

Sydney Surrounds North DN has 270 accommodation establishments with a room stock of over 11,570 (for establishments with ten rooms or more).



Domestic direct inbound flights have increased in 2021 with a total of 4,869 flights (+71.1% yoy) delivering 475,333 seats (+55.4% 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 (pre-pandemic).

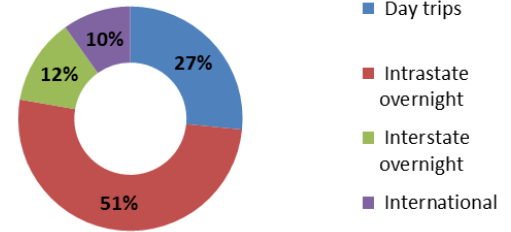
### Sydney Surrounds North DN is **Number 1 DN** in terms of Visitors!

#### ECONOMIC VALUE OF TOURISM

In terms of what is consumed by Tourism in Sydney Surrounds North DN represents about 13% of the state's Tourism Consumption. This was mostly delivered by Intrastate tourism to the Region.

Sydney Surrounds North DN has a substantial Domestic tourism market.

#### Sydney Surrounds North \$4.7 b\* Share of DN consumption



\*Year ended December 2020 tourism consumption data

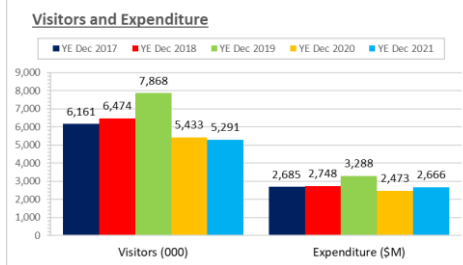
Sydney Surrounds North DN visitation has declined by 6% since 2016 in terms of visitor expenditure value.



#### TRAVEL TYPE

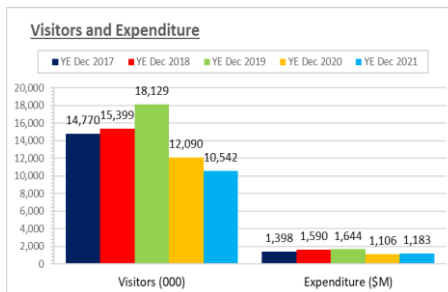
#### ORIGIN

##### Domestic Overnight



Origin	Share of Visitors		Share of Expenditure	
	YE Dec 2020	YE Dec 2021	YE Dec 2020	YE Dec 2021
Sydney	59.3%	56.5%	59.9%	56.6%
Regional NSW	32.5%	32.7%	31.2%	31.9%
Total Intrastate	91.8%	89.2%	91.2%	88.5%
Queensland	3.5%	4.4%	3.3%	4.8%
Victoria	2.2%	3.6%	2.5%	3.3%
Australian Capital	1.8%	1.7%	2.2%	1.5%
Other States	*	*	*	*
Total Interstate	8.2%	10.8%	8.8%	11.5%

##### Domestic Daytrip



Origin	Share of Visitors		Share of Expenditure	
	YE Dec 2020	YE Dec 2021	YE Dec 2020	YE Dec 2021
Interstate	*	*	*	*
Intrastate	99.7%	99.9%	99.6%	99.9%



### HUNTER

**8,157**

VISITORS IN SSN (000)



**8,927**

NIGHTS IN SSN (000)



**\$2,234**

EXPENDITURE IN SSN (\$M)



### CENTRAL COAST

**3,818**

VISITORS IN SSN (000)



**3,900**

NIGHTS IN SSN (000)



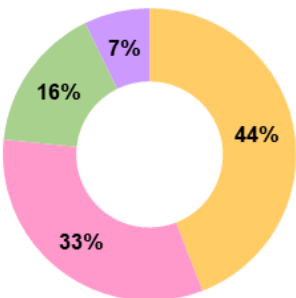
**\$872**

EXPENDITURE IN SSN (\$M)



Note: Purpose of visit shares provided only when statistically reliable

### TRAVEL TYPE



**2,954**

VISITORS IN SSN (000)



Domestic Overnight

**8,904**

NIGHTS IN SSN (000)



**\$1,573**

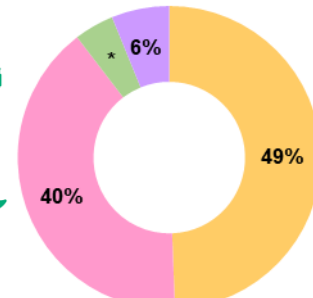
EXPENDITURE IN SSN (\$M)



- Holiday
- VFR
- Business
- Other

**1,375**

VISITORS IN SSN (000)



**3,835**

NIGHTS IN SSN (000)

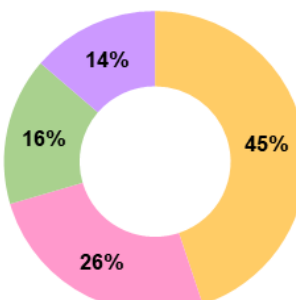


**\$634**

EXPENDITURE IN SSN (\$M)



- Holiday
- VFR
- Business
- Other



**5,201**

VISITORS IN SSN (000)



Domestic Daytrip

**\$659**

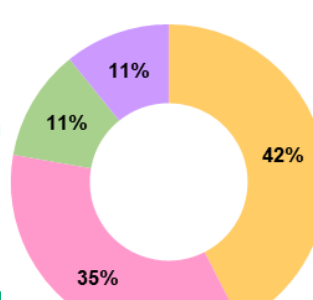
EXPENDITURE IN SSN (\$M)



- Holiday
- VFR
- Business
- Other

**2,440**

VISITORS IN SSN (000)



**\$232**

EXPENDITURE IN SSN (\$M)



- Holiday
- VFR
- Business
- Other



### BLUE MOUNTAINS

### SYDNEY

**2,268**

VISITORS IN SSN (000)



**1,854**

NIGHTS IN SSN (000)



**\$494**

EXPENDITURE IN SSN (\$M)



**1,673**

VISITORS IN SSN (000)



**791**

NIGHTS IN SSN (000)

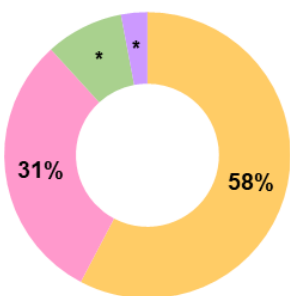


**\$259**

EXPENDITURE IN SSN (\$M)



Note: Purpose of visit shares provided only when statistically reliable



**725**

VISITORS IN SSN (000)



Domestic Overnight



**1,849**

NIGHTS IN SSN (000)



**\$341**

EXPENDITURE IN SSN (\$M)



- Holiday
- VFR
- Business
- Other

**315**

VISITORS IN SSN (000)



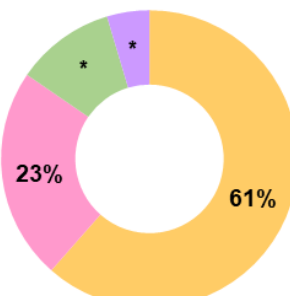
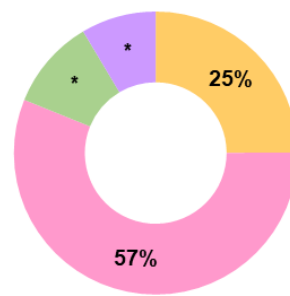
**777**

NIGHTS IN SSN (000)



**\$119**

EXPENDITURE IN SSN (\$M)



**1,543**

VISITORS IN SSN (000)



Domestic Daytrip



**\$153**

EXPENDITURE IN SSN (\$M)



- Holiday
- VFR
- Business
- Other

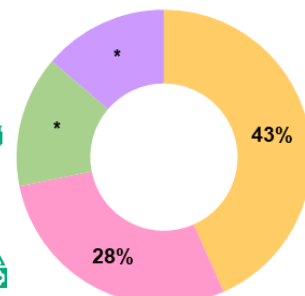
**1,358**

VISITORS IN SSN (000)



**\$140**

EXPENDITURE IN SSN (\$M)





## 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

**Notes:**

Items with \* are available but not statistically reliable.

Items with n/a means data are not available.



Domestic  
Overnight  
Visitors



Daytrip  
Visitors

	Domestic Overnight Visitors	Daytrip Visitors
Eat out / dine at a restaurant and/or cafe	56%	42%
Visit friends & relatives	34%	24%
Go to the beach	28%	10%
Bushwalking / rainforest walks	20%	9%
Sightseeing/looking around	19%	14%
Pubs, clubs, discos etc	18%	5%
Go shopping for pleasure	16%	14%
Visit national parks / state parks	12%	8%
Visit wineries	7%	*
Exercise, gym or swimming	6%	*
Other outdoor activities nfd	5%	*
Water activities / sports	4%	*
Go to markets	4%	*
Visit museums or art galleries	3%	*
Golf	3%	*
Fishing	3%	*
Play other sports	3%	*
Visit botanical or other public gardens	3%	*
Picnics or BBQs	3%	*
Visit history / heritage buildings, sites or monuments	2%	*
Go on a daytrip to another place	2%	n/a
Cycling	2%	*
Visit wildlife parks / zoos / aquariums	2%	*
Surfing	2%	*
Visit breweries	2%	*
Attend an organised sporting event	1%	*
Go on guided tours or excursions	1%	*





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

## SYDNEY SURROUNDS NORTH DN

### TOTAL

**15,839**

VISITORS IN SSN  
(000)



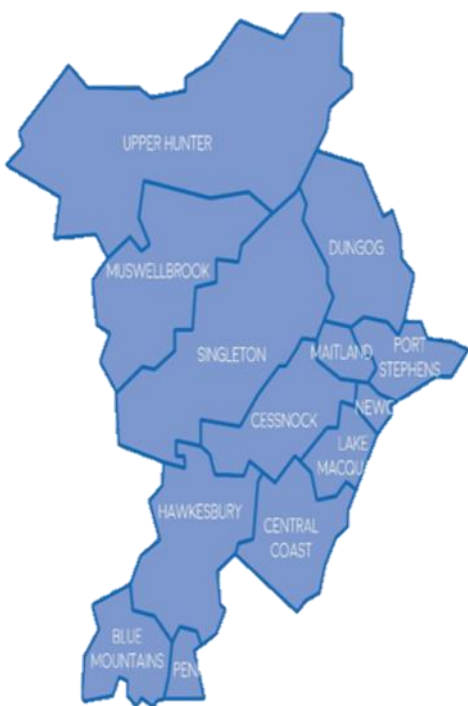
**15,471**

NIGHTS IN SSN  
(000)



**\$3,859**

EXPENDITURE IN SSN  
(\$M)



Note:

International data cannot be provided due to small sample size (data is statistically unreliable), however, it is included in the Total for each LGA.

## SYDNEY

### TOTAL SYDNEY

Total Tourism Domestic Overnight Daytrip

Visitors (000)	1,673	315	1,358
Share of SSN %	11%	6%	13%
Expenditure (\$M)	259	119	140
Share of SSN %	7%	4%	12%

### Hawkesbury (C)

Total Tourism Domestic Overnight Daytrip

Visitors (000)	832	144	688
Share of SSN %	5%	3%	7%
Expenditure (\$M)	122	63	59
Share of SSN %	3%	2%	5%

### Penrith (C)

Total Tourism Domestic Overnight Daytrip

Visitors (000)	800	168	631
Share of SSN %	5%	3%	6%
Expenditure (\$M)	133	55	78
Share of SSN %	3%	2%	7%

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

## CENTRAL COAST

### TOTAL CENTRAL COAST

Total Tourism Domestic Overnight Daytrip

Visitors (000)	3,818	1,375	2,440
Share of SSN %	24%	26%	23%
Expenditure (\$M)	872	634	232
Share of SSN %	23%	24%	20%

### Central Coast (C) (NSW)

Total Tourism Domestic Overnight Daytrip

Visitors (000)	3,573	1,302	2,269
Share of SSN %	23%	25%	22%
Expenditure (\$M)	829	603	219
Share of SSN %	21%	23%	19%

Other area includes Unincorporated NSW, data available but not publishable.

## BLUE MOUNTAINS

### TOTAL BLUE MOUNTAINS

Total Tourism Domestic Overnight Daytrip

Visitors (000)	2,268	725	1,543
Share of SSN %	14%	14%	15%
Expenditure (\$M)	494	341	153
Share of SSN %	13%	13%	13%

### Blue Mountains (C)

Total Tourism Domestic Overnight Daytrip

Visitors (000)	2,265	722	1,543
Share of SSN %	14%	14%	15%
Expenditure (\$M)	493	340	153
Share of SSN %	13%	13%	13%



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

**SYDNEY SURROUNDS NORTH DN**

**TOTAL**

**15,839**

VISITORS IN SSN (000)



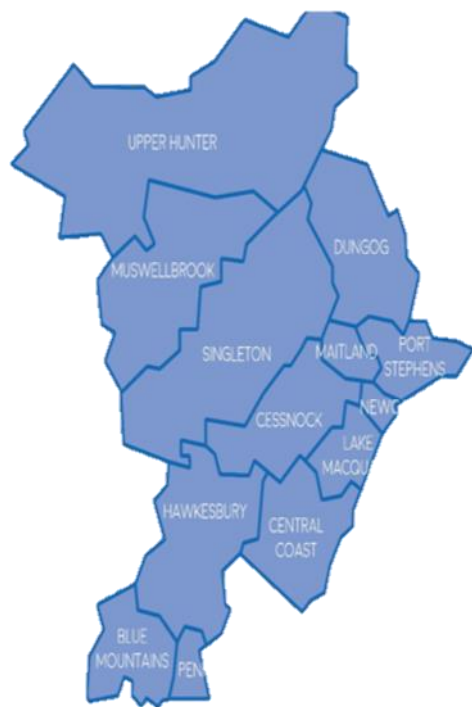
**15,471**

NIGHTS IN SSN (000)



**\$3,859**

EXPENDITURE IN SSN (\$M)



**HUNTER**

**TOTAL HUNTER**

	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	8,157	2,954	5,201
Share of SSN %	52%	56%	49%
Expenditure (\$M)	2,234	1,573	659
Share of SSN %	58%	59%	56%

Cessnock (C)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	857	376	481
Share of SSN %	5%	7%	5%
Expenditure (\$M)	381	306	75
Share of SSN %	10%	11%	6%

Dungog (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	175	*	*
Share of SSN %	1%	*	*
Expenditure (\$M)	26	*	*
Share of SSN %	1%	*	*

Lake Macquarie (C)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	1,118	347	771
Share of SSN %	7%	7%	7%
Expenditure (\$M)	205	133	72
Share of SSN %	5%	5%	6%

Maitland (C)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	752	149	603
Share of SSN %	5%	3%	6%
Expenditure (\$M)	141	46	95
Share of SSN %	4%	2%	8%

Muswellbrook (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	169	*	*
Share of SSN %	1%	*	*
Expenditure (\$M)	47	*	*
Share of SSN %	1%	*	*

Newcastle (C)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	2,818	1,006	1,811
Share of SSN %	18%	19%	17%
Expenditure (\$M)	665	423	241
Share of SSN %	17%	16%	20%

Port Stephens (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	1,330	593	737
Share of SSN %	8%	11%	7%
Expenditure (\$M)	490	422	68
Share of SSN %	13%	16%	6%

Singleton (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	412	154	*
Share of SSN %	3%	3%	*
Expenditure (\$M)	84	64	*
Share of SSN %	2%	2%	*

Upper Hunter Shire (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	310	127	*
Share of SSN %	2%	2%	*
Expenditure (\$M)	46	36	*
Share of SSN %	1%	1%	*