The NSW Visitor Economy

$31.8 billion
Total Visitor Spend
52% Domestic Overnight
19% Domestic Daytrip
29% International

89.6 million
Total Visitors to NSW
32.5% Domestic Overnight
63.3% Domestic Daytrip
4.2% International

181.2 million
Visitor Nights
52% Domestic Overnight
48% International

* For the year ended September 2016 compared to previous year’s results.
The NSW Visitor Economy

In Australia, New South Wales is:

- #1 for Visitors
- #1 for Visitor Nights
- #1 for Visitor Expenditure

NSW welcomes more than 50% of Australia’s International Visitors.
## Regional NSW Visitors

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>% YoY*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors (*’000)</td>
<td>21,364</td>
<td>+6.8%</td>
</tr>
<tr>
<td>Nights (*’000)</td>
<td>83,051</td>
<td>+5.8%</td>
</tr>
<tr>
<td>Expenditure (Billions)</td>
<td>10.7</td>
<td>+4.4%</td>
</tr>
</tbody>
</table>

* Year on Year  
Data source: International Visitor Survey and National Visitor Survey, September 2016
Review of Regional Tourism

- Review commissioned by the Hon Stuart Ayres MP, former Minister for Trade, Tourism and Major Events in 2016

- Undertaken by the Tourism Sub-committee of the Board of Destination NSW

- Two phases:
  1. Review of the structure of Regional Tourism Organisations
  2. Examined specific issues raised during the phase one - including future funding of Regional Tourism Organisations.
Review of Regional Tourism Outcomes

- Increased funding - $43 million over four years
- New Destination Networks
- New Regional Tourism Fund
- Enhanced Regional Flagship Events Funding Program
- Regional NSW Division in Destination NSW
- Regional Conferencing Unit
Six new Destination Networks established:

- Riverina Murray
- Southern NSW
- North Coast inc. Lord Howe Island
- Country & Outback NSW
- Sydney Surrounds North
- Sydney Surrounds South
Destination Network Status Update

- All Destination Networks have been established
- All Chairs and Board Members appointed
- All Destination Network Chairs and Board Members have received a welcome briefing from Destination NSW
- Destination Networks are now recruiting their teams and establishing their offices
Role of Destination Networks

Industry Engagement and Industry Development
• Act as the primary contact for local visitor economy stakeholders
• Identify new industry development initiatives

Product Development
• Work with Local Government and industry on product development and investment attraction
• Update Destination NSW on new and developing products in the region
• Assist in the implementation of regional conferencing projects
How Destination Networks will work with Destination NSW

**Training and Education**
- Provide training and advice to local industry
- Work with Destination NSW on aligned industry training programs such as the Industry First workshop program

**Regional Tourism Funding**
- Assist local applicants in applying for Destination NSW funding programs
- Carry out initial assessment of Regional Tourism Fund applications for:
  - Compliance
  - EOIs for marketing activities
A new Regional Division is being established within Destination NSW with responsibility for:

• Destination Development, recruitment of General Manager and six Regional Tourism Development Managers underway
• Sector Development – Aboriginal Tourism, Youth, Food & Wine and Cruise
• Regional Conferencing
• Regional Tourism Funding Programs
  • Marketing Program
  • Product Development
• Regional Events Funding
• Trade & Industry Services
• Visitor Services
Regional Tourism Fund

• New program providing $13 million in funding between 2016 and 2019, to support the regional tourism industry in NSW.

• The funding is presented in two streams:
  • Regional Cooperative Tourism Marketing Program
  • Regional Tourism Product Development Program

• All funding must be matched at least dollar for dollar in cash

• Up to $4 million is available in the 2016 – 2017 financial year

• $4.5 million will be available during the 2017 – 2018 and 2018 – 2019 financial years.

• Any unallocated funds from 2016 – 2017 will be rolled into next year’s program.
Regional Events Funding Programs

Regional Event Investment
Supports large scale events that align closely with the strategic goals of Destination NSW.

Regional Flagship Events Program
Three funds that support locally developed events:

1) **Incubator Event Fund:**
   Establishment grant of up to $20,000 for a maximum of two years

2) **Flagship Event Fund:**
   Annual or triennial marketing grants for events that have been running for a minimum of two years.

3) **Event Development Fund:**
   Grants to support strategic development initiatives for events that have completed the Flagship Event Fund
# Major Events Secured

<table>
<thead>
<tr>
<th>Events Secured</th>
<th>Pre DNSW 26 March 2007 to 25 March 2011</th>
<th>Post DNSW 26 March 2011 to 31 January 2017</th>
<th>Increase in Events</th>
<th>% Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sydney Metro</td>
<td>85</td>
<td>166</td>
<td>81</td>
<td>95%</td>
</tr>
<tr>
<td>Western Sydney</td>
<td>19</td>
<td>64</td>
<td>45</td>
<td>237%</td>
</tr>
<tr>
<td>Regional NSW</td>
<td>34</td>
<td>102</td>
<td>68</td>
<td>200%</td>
</tr>
<tr>
<td>Regional Flagship Events Program</td>
<td>72</td>
<td>153</td>
<td>81</td>
<td>113%</td>
</tr>
<tr>
<td>Total</td>
<td>210</td>
<td>485</td>
<td>275</td>
<td>131%</td>
</tr>
</tbody>
</table>

As at 31 January 2017
Regional Flagship Events Program - 2017

- 2017 Bathurst Winter Festival
- 2017 Hi-Tec Oils Bathurst 6 Hour
- Broken Heel Festival
- Byron Spirit Festival
- Cobargo Folk Festival
- Coffs TRI
- Dream Festival
- Grafton Jacaranda Festival
- Newcastle Writers Festival 2017
- Roaring 20s Festival
- Sculpture at Scenic World 2017

- Snow Time in the Garden – Hunter Valley Gardens
- Taste Riverina
- Tastings on Hastings
- Tenterfield Oracles of the Bush
- The Ballina Prawn Festival
- Trundle Abba Festival
- Wollongong Triathlon Festival
- Write around the Murray Festival
- Yours and Owls Festival
Regional Flagship Events Program - 2017

• Batlow CiderFest
• Boggabri Drovers Campfire
• Carcoar Cup Running Festival
• Narooma Oyster Festival
• River of Art
• Sample Food Festival
• Canowindra Balloon Challenge
• Huskisson Long Course Triathlon Festival
• The Murrumbateman Moving Feast

• The Wingham Akoostic Music Festival
• Ultra-Trail Australia
• Woolgoolga Curryfest
• Australian Long Board Surfing Championship
• Orange Wine Festival
• Peak Festival
• Sculptures in the Vineyard
• The Riverboats Music Festival
Visitor Services

Official Sydney Guide:
• One million copies of the guide printed annually in English, Chinese, Japanese and Korean, updated twice a year
• A new publisher has been appointed
• New look and feel - More opportunities to promote Regional NSW

Accredited Visitor Information Centre Merchandising Program
• New initiative with TAFE NSW offers free workshops in visual merchandising
• Workshops are being conducted in 11 regional VIC locations
• 80 regional VICS will participate in the training with over 200 VIC staff attending the training
Visitor Services

Destination Ambassador Program

• Partnering with TAFE NSW
• Three workshops: Delivering Destination Services - Specialist Destination Advice - Supporting Destination Events
• Launched October 2016 at the Overseas Passenger Terminal and White Bay
• Similar programs delivered at Eden, Newcastle and Wollongong
• To date 12 regional destinations have registered their interest in running their own Destination Ambassador Program
Visitor Services

Accredited Visitor Information Centre Program

• The Tourism Group - Accredited Visitor Information Centre Program Manager from 2016 to 2019
• An audit has commenced of NSW Accredited Visitor Information Centres
• Visits to every centre in NSW within the next nine months
• Provide support to Accredited Visitor Information Centres on continuous business improvements.
Australian Tourism Exchange 2017

• 14 to 18 May 2017 at the new International Convention Centre Sydney
• The Southern Hemisphere’s largest annual travel and tourism business-to-business event
• Opportunity to showcase Australian products directly to international tourism wholesalers and retailers
• Includes a pre and post event familiarisations program
• 88 NSW sellers
• 2017, 32 sellers from Regional NSW and 20 new sellers
Industry Development:

• **NSW First Workshops & Webinars:**
  - 1,193 people participated in workshops and webinars over the last two years
  - A new calendar for 2017/18 is currently in development

• **Export ready development:**
  - Work with tourism businesses and regions to develop qualified export ready product for trade distribution

• **Toolkits and resources:**
  - Tourism Business Toolkit, Inbound Guide & templates, China Market Toolkit
‘What I love about Holidays in NSW’ Campaign Objective

• Inspire NSW holidays by generating engagement and word of mouth amongst Australian travellers via:
  • Bringing the State’s tourism and event experiences to life through the use of Destination NSW and consumer generated content assets across each stage of the customer journey travel cycle (inspiration, planning, booking, travel and post travel)
  • Engaging visitnsw.com’s 11 million web visitors and 2.6 million social media followers with inspiring videos and images
  • Developing content generation and distribution partnerships and programs that generate economies of scale.
Creative Examples – Phase One

Plan a gourmet tour through the South Coast and stop off at Cupitt’s Winery. A family run boutique Winery with a Cellar Door, Restaurant, Bar, Microbrewery and Fromagerie. Food, wine, beer, and cheese heaven.

Love foodie getaways?
Discover NSW food and wine holidays #LoveNSW
VISITNSW.COM

Plan your next family holiday on the mighty Murray River. Hire a houseboat and swim, kayak and bushwalk amongst the giant redgums in the river.

Love nature escapes?
Discover NSW nature holidays #ILoveNSW
VISITNSW.COM
Creative Examples – Phase One

Love nature escapes?
Discover NSW nature holidays #ILoveNSW
VISITNSW.COM

Love foodie getaways?
Discover NSW food and wine holidays #ILoveNSW
VISITNSW.COM
Love nature escapes?
Love exciting events?
Love historic journeys?
Love historic journeys?
Looking Forward

Sector Development
Cruise visitation to NSW 2015 - 16

- Cruise ship visits to NSW ports in 2015-16: 322
  - Sydney: 304 (336 est. in 2016-17*)
  - Newcastle: 10
  - Eden: 8
- 10+% increase expected over the 2016 -17 season
- October 2016 - Royal Caribbean Cruises Radiance of the Seas first visit to Wollongong
- Royal Caribbean are due to return for two visits to Wollongong in 2018
- Wollongong also welcomed Norwegian Cruise Lines, Norwegian Star in February 2017.

*Source: Port Authority of NSW
Cruise – Regional Support

Destination Profiling

Consumer Promotions

Trade Promotions & Training

Regional Representation
Aboriginal Tourism

• The Aboriginal Tourism Action Plan 2013 to 2016 has been completed
• Aboriginal Tourism Business Toolkit to be launched shortly
• Consultation on the Aboriginal Tourism Action Plan 2017 – 2020 commencing shortly
• Export-ready Aboriginal tourism products and experiences working with Destination NSW have risen from five in 2012 to 18 currently
• 32 market ready Aboriginal experiences also working with Destination NSW on development and marketing activities.
• Participation in Aboriginal Tourism workshops has grown significantly with around 100 people attending the most recent workshop in November 2016.
Aboriginal Tourism – Regional Support

Digital Promotions & PR

Consumer Promotions

Regional Workshops

Print Publications

Aboriginal Tourism Action Plan 2013-2016

Jetstar MAGAZINE

Back to Country

Sydney Life

NAIDOC Week in Sydney

In plain sight: Indigenous rock art on Sydney’s doorstep

More than a thousand significant rock art sites less than hour from Sydney. A new tour shows you where to find them from land and water
Food & Wine Tourism

- Increasingly visitors to NSW are looking for local and authentic food and drink experiences
- The Food & Wine Tourism Action Plan 2017 – 2020 is being developed to ensure that the State’s food and wine tourism potential is maximised
- Consultation will commence shortly in two phases:
  1. A stakeholder survey
  2. Industry workshops
Food & Wine – Regional Support

Digital Promotions

Print Publications

Broadcast
Youth Tourism Action Plan

• Youth travellers are a high value segment and have greater propensity to longer stays and regional dispersal
• The State has many opportunities for youth visitors to engage in leisure, work and study experiences in Sydney and Regional NSW
• The Youth Tourism Action Plan is being created to provide NSW youth tourism operators and the tourism industry with a guide to Destination NSW’s plan to support the further development of the youth tourism sector in NSW.
Youth – Regional Support

#MTVTrippers
Web Series – 2 million views

60-Day Adventurer Campaign

Advertising & Promotion

Instameets

Blogger Activities
Other Plans
Visitor Economy Industry Action Plan Review

• 2017 halfway point in the implementation
• The NSW Government is conducting a strategic review of the Plan to:
  • Ensure currency; and
  • Consider plans for 2020 and beyond.
Working with Destination NSW

There are many opportunities to work with Destination NSW. The 2016/17 Partner Opportunities Prospectus is a useful guide to working with us to grow the NSW Visitor Economy

- Marketing & Publicity
- Get Connected / NSW Connect
- Industry assistance and advice
- Trade Shows and Missions
- Trade and Media Visits
- Event Development
- Resources