



Destination
Sydney Surrounds South

The Value of Tourism to Sydney Surrounds South 2022



**Every minute of every day,
Tourism delivers \$6,270 of
domestic visitor spend into
Sydney Surrounds South**

**That is over \$9.0 million per day!!
A value that has grown by 56.1%
in the last year alone.**

International visitation to the Sydney Surrounds South Destination Network (DN) for the year ended (YE) December 2022 cannot be shown in this booklet due to small sample size (which means that data is not statistically reliable).

This year the number of total domestic visitors to Sydney Surrounds South DN is 11.3 million or 8 per cent below the pre-Covid period (year 2019), and 50 per cent above the 2021 visitation level.



Tourism delivers **7.7%** of our jobs, supports **5,500** businesses and directly delivers **4.0%** of our region's Gross Value Add (GVA) which has grown every year since 2010/11 at an average **1.5%** pa.

NSW's Visitor Economy

In 2020-2021, NSW's visitor economy (3.1% share of state GVA) was worth more than Agriculture, Forestry & Fishing and Mining (1.8% share of state GVA). It scored just below Education & Training (5.3% share of state GVA). The total filled jobs were about 4.0% of the state's total filled jobs and 66.6% of the 10-year (2010-2020) average filled jobs in the visitor economy.

In 2021-2022, NSW's visitor economy (2.7% share of state GVA) is worth more than Agriculture, Forestry & Fishing (2.6% share of state GVA). It scored just below Mining (4.5% share of state GVA). The total filled jobs were about 3.8% of the state's total filled jobs and 66.7% of the 10-year (2011-2021) average filled jobs in the visitor economy.

Source: TRA, STSA, 2020-21 & 2021-22.

NSW's TOURISM INVESTMENT

NSW held nearly 32% of 2021-22 Tourism Investment Pipeline being the largest among all states and territories, with 59 projects valued at \$14.1bn.

1. Aviation (\$5.4bn)
2. Accommodation (\$4.7bn)
3. Arts, recreation & business services (\$4.0bn)
4. Regional investment (\$1.1bn)

Source: TRA, Tourism Investment Monitor 2021-22.

REGIONAL EMPLOYMENT DUE TO TOURISM

Tourism's DIRECT Contribution to Employment

FULL TIME 6,110
PART TIME 8,461

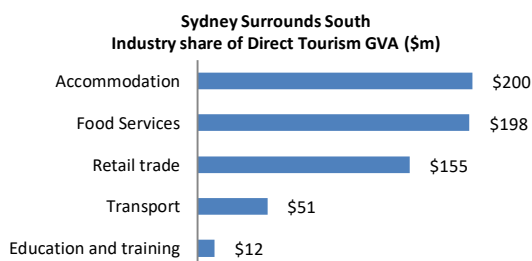


Supporting our local economy, Tourism supplies 7.7% of the region's employment including 14,571 persons who are directly employed and a further 3,978 who are indirectly employed.

There are 5,500 tourism related businesses in Sydney Surrounds South DN, around 14% of all Regional NSW Tourism businesses.

Source: TRA, STSA, 2020-21; TRA, Tourism Businesses in Australia, June 2022.

REGIONAL BUSINESSES RELYING ON TOURISM



Economically, tourism businesses directly deliver \$768 million (4.0%) of the region's GVA – over 80% of which is delivered by our Accommodation, Food Service, Retail, Transport and Education establishments.

Source: TRA, STSA, 2020-21.

TOURISM SUPPLY

Establishments with 10 rooms or more

		SUPPLY			DEMAND		REVENUE		
Year ended		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	Dec-2022	120	3,860	1,402	929	66.3%	214	231	153
South	%Ch on 2021	0.8%	1.6%	1.9%	44.1%	19.4 ppts*	59.9%	11.0%	56.9%

*percentage point change

Source: STR Tourist Accommodation, 2022

Sydney Surrounds South DN has 120 accommodation establishments with a room stock of 3,860 (for establishments with ten rooms or more).



Domestic direct inbound flights have increased in 2021 with a total of 472 flights (+49.8% yoy) delivering 16,048 seats (+49.8% yoy).

Source: Official Airline Guide OAG

Notes:

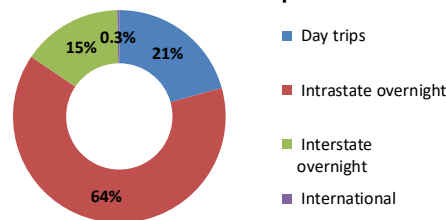
- ☐ Visitor Economy includes money spent directly in the tourism industry and other related expenditure by the flow-on effect of the tourism industry.
- ☐ Gross Value Added (GVA), Tourism Jobs and Businesses data p.a. are only available by tourism regions (TR) in official statistics. For each DN, GVA was estimated based on its visitor expenditure share of the TR's 2016-19 average, Tourism Jobs and Businesses were estimated based on visitor number share of the TR's 2016-19 average.
- ☐ Tourism Investment Pipeline represents all known major tourism-related projects in fixed assets having an est. financial value of \$20m or more in 3 main tourism segments (aviation; arts, recreation & business services; accommodation).

Sydney Surrounds South DN is **Number 3 DN** in terms of Total Domestic Visitors, Nights and Expenditure

ECONOMIC VALUE OF TOURISM

In terms of what is consumed by Tourism in Sydney Surrounds South DN represents about 10% of the state's Tourism Consumption. This is mostly delivered by Intrastate tourism to the Region. Sydney Surrounds South has a substantial Domestic tourism market.

Sydney Surrounds South \$2.7 b* Share of DN consumption



*FY 2020-2021 tourism consumption data

Sydney Surrounds South DN domestic visitation has grown over 81% since 2016 in terms of visitor expenditure value.

SYDNEY SURROUNDS SOUTH DN TOTAL

11,323

VISITORS
(000)



11,473

NIGHTS
(000)



\$3,296

EXPENDITURE
(\$M)



TRAVEL TYPE

Domestic Overnight

Source: Tourism Research Australia, National Visitor Survey.

3,884

VISITORS
(000)



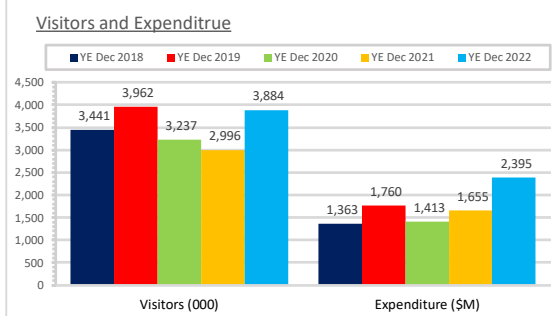
11,473

NIGHTS
(000)



\$2,395

EXPENDITURE
(\$M)



ORIGIN

Origin	Share of Visitors		Share of Expenditure	
	YE Dec 2021	YE Dec 2022	YE Dec 2021	YE Dec 2022
Sydney	59.5%	58.0%	60.9%	53.8%
Regional NSW	26.8%	26.2%	26.3%	26.9%
Total Intrastate	86.3%	84.2%	87.2%	80.7%
Australian Capital T	6.1%	6.4%	6.3%	6.9%
Victoria	3.7%	4.4%	2.9%	4.6%
Queensland	2.9%	3.8%	2.2%	5.8%
Other Interstate	*	*	*	*
Total Interstate	13.7%	15.8%	12.8%	19.3%

Domestic Daytrip

Source: Tourism Research Australia, National Visitor Survey.

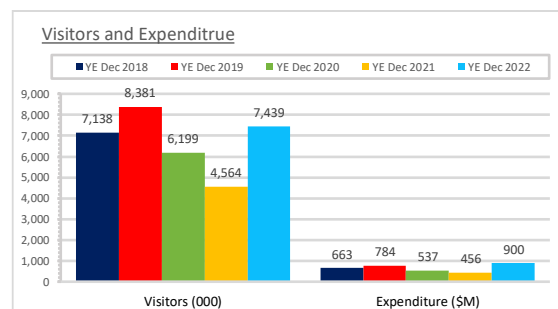
7,439

VISITORS
(000)



\$900

EXPENDITURE
(\$M)



Origin	Share of Visitors		Share of Expenditure	
	YE Dec 2021	YE Dec 2022	YE Dec 2021	YE Dec 2022
Interstate	*	*	*	*
Intrastate	96.8%	98.4%	96.4%	97.8%

Note:

□ Items with * are available but not statistically reliable.



SOUTH COAST

9,631
VISITORS
(000)



9,928
NIGHTS
(000)



\$2,741
EXPENDITURE
(\$M)



CAPITAL COUNTRY

1,709
VISITORS
(000)



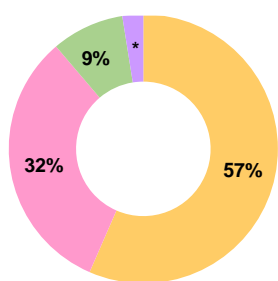
1,544
NIGHTS
(000)



\$554
EXPENDITURE
(\$M)



Note: Purpose of visit shares provided only when statistically reliable



■ Holiday
■ Visiting Friends and Family
■ Business
■ Other

3,280
VISITORS
(000)



9,928
NIGHTS
(000)



\$2,044
EXPENDITURE
(\$M)



TRAVEL TYPE

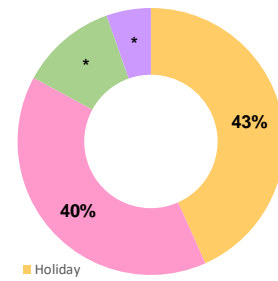
Domestic Overnight



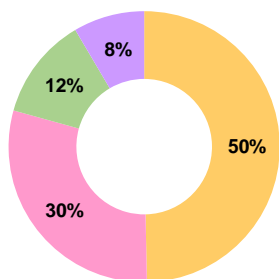
622
VISITORS
(000)

1,544
NIGHTS
(000)

\$351
EXPENDITURE
(\$M)



■ Holiday
■ Visiting Friends and Family
■ Business
■ Other



■ Holiday
■ Visiting Friends and Family
■ Business
■ Other

6,532
VISITORS
(000)



\$698
EXPENDITURE
(\$M)

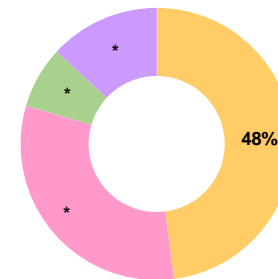


Domestic Daytrip



1,087
VISITORS
(000)

\$203
EXPENDITURE
(\$M)



■ Holiday
■ Visiting Friends and Family
■ Business
■ Other

Source: Tourism Research Australia, National Visitor Survey.

Note:
□ Items with * are available but not statistically reliable.



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

Since 2022, Sydney Surrounds South has secured events that have delivered \$181 million worth of visitor expenditure into the state.



SYDNEY SURROUNDS SOUTH DN EVENTS DELIVERED...

Domestic Overnight



188

VISITORS
(000)



353

NIGHTS
(000)



\$128

EXPENDITURE
(\$M)



Source: Tourism Research Australia, National Visitor Survey.

SAMPLE OF SYDNEY SURROUNDS SOUTH DN EVENTS

The KISS Arts Festival
Rising From the Ashes
Robertson Potato Festival
Big Country Festival
Beta Climbing Festival
Masters and Junior Road
National Championship
Tulip Time

Burradise Festival at Culburra Beach
Tulip Time
Bowral Classic
The Waterfront Food + Wine Festival
Sand N Sea Festival
Shellharbour SUP Festival
Wings Over Illawarra
Siteworks
GV Block Party



Photo Credit: Destination NSW

Note:

☐ Daytrip event visitor data in Sydney Surrounds South DN are available but not statistically reliable.



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



**Domestic
Overnight**



**Domestic
Daytrip**

	Domestic Overnight	Domestic Daytrip
Eat out / dine at a restaurant and/or cafe	58%	49%
Go to the beach	42%	25%
Visit friends & relatives	34%	29%
Pubs, clubs, discos etc	26%	9%
Sightseeing/looking around	23%	19%
Bushwalking / rainforest walks	20%	8%
Go shopping for pleasure	18%	15%
Visit national parks / state parks	14%	6%
Water activities / sports	6%	*
Go to markets	6%	*
Fishing	6%	*
Exercise, gym or swimming	5%	*
Visit museums or art galleries	4%	*
Play other sports	4%	*
Visit wineries	4%	n/a
Other outdoor activities nfd	4%	*
Surfing	4%	*
Cycling	4%	*
Golf	3%	*

Source: Tourism Research Australia, National Visitor Survey.

Notes:

- ❑ Items with * 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**?



CAPITAL COUNTRY

TOTAL CAPITAL COUNTRY	Total Domestic Tourism	Domestic Overnight	Daytrip
Visitors (000)	1,709	622	1,087
Share of SSS %	15%	16%	15%
Expenditure (\$M)	554	351	203
Share of SSS %	17%	15%	23%

Wingecarribee (A)	Total Domestic Tourism	Domestic Overnight	Daytrip
Visitors (000)	1,611	607	1,005
Share of SSS %	14%	16%	14%
Expenditure (\$M)	536	345	191
Share of SSS %	16%	14%	21%

Source: Tourism Research Australia, National Visitor Survey.

SYDNEY SURROUNDS SOUTH DN TOTAL

11,323
VISITORS
(000)



11,473
NIGHTS
(000)



\$3,296
EXPENDITURE
(\$M)



SOUTH COAST

TOTAL SOUTH COAST TR	Total Domestic Tourism	Domestic Overnight	Daytrip
Visitors (000)	9,631	3,280	6,352
Share of SSS %	85%	84%	85%
Expenditure (\$M)	2,741	2,044	698
Share of SSS %	83%	85%	77%

Kiama (A)	Total Domestic Tourism	Domestic Overnight	Daytrip
Visitors (000)	1,234	428	806
Share of SSS %	11%	11%	11%
Expenditure (\$M)	312	224	88
Share of SSS %	9%	9%	10%

Shoalhaven (C)	Total Domestic Tourism	Domestic Overnight	Daytrip
Visitors (000)	3,096	1,615	1,481
Share of SSS %	27%	42%	20%
Expenditure (\$M)	1,212	1,042	170
Share of SSS %	37%	43%	19%

Wollongong (C)	Total Domestic Tourism	Domestic Overnight	Daytrip
Visitors (000)	4,104	890	3,213
Share of SSS %	36%	23%	43%
Expenditure (\$M)	761	449	313
Share of SSS %	23%	19%	35%

Shellharbour (C)	Total Domestic Tourism	Domestic Overnight	Daytrip
Visitors (000)	804	150	653
Share of SSS %	7%	4%	9%
Expenditure (\$M)	254	149	105
Share of SSS %	8%	6%	12%

Note:

- ❑ Items with * are available but not statistically reliable
- ❑ Sydney Surrounds South DN also includes other Unincorporated areas for which data are available but not statistically reliable.