



Visitor Economy Strategy 2030 Review Report summary



A bold plan for the NSW visitor economy



In 2024, the global visitor economy is set to surge to \$11.1 trillion, supporting 348 million jobs – a testament to its resilience and strong recovery. NSW has also rebounded, reaching \$51.4 billion in visitor spending by the end of 2023.

Yet, the potential to further grow inbound tourism is immense as new international airports cement NSW as Australia's major international gateway.

There is also a great opportunity to leverage the NSW Government's focus on the night-time economy, the arts, culture and creative industries.

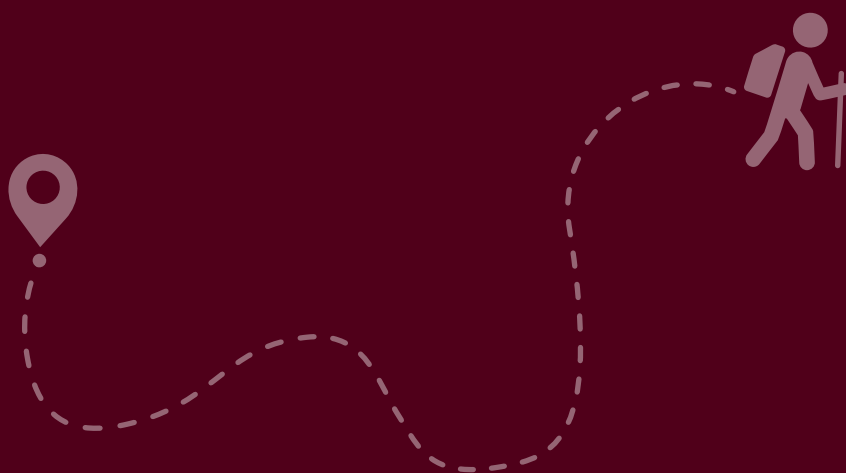
Tourism has the potential to play a larger role in the state's economy, labour market and export mix as it transitions away from coal and other traditional industries.





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COVER: Olympian Rock Lookout, Blue Mountains National Park

PREVIOUS PAGE: Sculptures by the Sea, Bondi.

RIGHT: The Living Desert and Sculptures, Broken Hill.

Photos: Destination NSW.







With input from over 500 stakeholders, NSW has set an ambitious stretch goal: a \$91 billion visitor economy by 2035. Achieving this requires unlocking \$65 billion of potential additional value¹ over the next decade, to be driven by a genuine government and industry partnership and a renewed focus on creating and marketing compelling visitor experiences.

This vision demands bold thinking and ambition. NSW must prioritise the visitor economy across all levels of government, invest in cutting-edge infrastructure, expand aviation capacity, and enhance the accommodation offering statewide. We must leverage the state's natural assets, elevate First Nations stories, utilise events as seasonal reasons to visit and brand builders for the state, harness and grow the meaning of Sydney's brand, and deliver exceptional visitor experiences informed by global trends and consumer insights.

Driven by a new set of strategic priorities, a refreshed NSW Visitor Economy Strategy should chart a clear path to 2035, progressing through three phases: Transition, Take-off, and Sustainable Growth.

The NSW Government should make the visitor economy an economic priority and ensure whole of government alignment to achieve the \$91 billion stretch goal. In collaboration with stakeholders across the state, NSW can build a vibrant, sustainable visitor economy that drives prosperity and positions NSW as a leading global destination by 2035.

BUILD THE FUTURE: OPPORTUNITIES FOR VISITOR ECONOMY GROWTH

To achieve the \$91 billion stretch goal by 2035, NSW should:

- Prioritise the NSW Visitor Economy Strategy as a government-wide economic focus.
- Anchor the Visitor Economy Strategy around 'experience tourism', reflecting the growing consumer desire for connecting authentically with local culture.
- Celebrate First Nations culture through authentic visitor experiences and supporting First Nations business opportunities.
- Enhance accommodation quality across regional NSW and expand capacity in Greater Sydney.
- Focus on statewide visitor economy infrastructure projects.
- Develop and market distinctive visitor experiences throughout NSW.
- Boost aviation capacity in key domestic and international markets.
- Leverage leisure events to grow seasonal visitation and showcase NSW's strengths.
- Dominate Australia's business events sector.
- Strengthen and expand Brand Sydney authentically and with greater discoverability.
- Realign Destination NSW programs and investments to meet the 2035 goal.
- Build a robust, industry-wide cooperative marketing program.
- Capitalise on NSW's status as being number one for international students.
- Align the visitor economy with NSW's sustainability objectives.
- Develop advanced performance and investment metrics beyond economic measures.
- Deliver a Destination NSW-led data platform for real-time visitation data and visitor insights.
- Foster a diverse, skilled visitor economy workforce.
- Leverage NSW's technological and innovative strengths to enhance the visitor experience.

¹ \$87 billion when compared to a scenario where market share is lost.



PROCESS

This review was led by a dedicated group charged by the Minister for Jobs and Tourism with considering how NSW could strengthen what is already great about its visitor economy and identifying those opportunities to achieve even better outcomes.

This group was comprised of Andrew McEvoy (Steering Committee Chairman and tourism expert), Sally Loane (Chairman, Destination NSW), and Elizabeth Mildwater (Secretary, Department of Creative Industries, Tourism, Hospitality and Sport).

Now the review is complete and recommendations have been provided to the NSW Government, the next step is the finalisation of a refreshed NSW Visitor Economy Strategy. This strategy will set the direction to 2035 for the NSW Government and visitor economy stakeholders to achieve the \$91 billion stretch goal.

CONSULTATION

Between April and June 2024, 40 roundtables engaged over 400 stakeholders statewide. These sessions covered NSW's Destination Networks and Greater Sydney, and included key sectors like accommodation, attractions, aviation, industry associations and First Nations representatives. Feedback was also gathered from over 130 responses via the NSW Government 'Have Your Say' portal.

BELOW: A smoking ceremony at Blues Point Reserve, Sydney as part of the Dreamtime Southern X experience. Photo: Destination NSW.



The ambition: NSW as a visitor economy powerhouse



AIM HIGH – TARGET A \$91 BILLION VISITOR ECONOMY BY 2035

The NSW Government has set an ambitious stretch goal: to boost annual visitor expenditure to \$91 billion by 2035.

Building on the success of the *NSW Visitor Economy Strategy 2030* – which set a \$65 billion target and saw visitor spending reach \$51.4 billion by December 2023 – NSW is ready to elevate its aspirations.

Informed by research from BDA Marketing Planning, this new stretch goal envisions 74% domestic and 26% international visitor contributions, including both overnight stays and day trips. Achieving this could inject a potential additional \$65 billion into NSW over the next decade¹, offsetting revenue gaps as the economy shifts from transitioning industries such as coal. \$91 billion in visitor expenditure is a genuine stretch goal and requires the state to regain historical levels of national market share.

To make this ambition a reality, NSW should:

- **Enhance its unique experiences** to capture greater market share.
- **Improve access** within and to NSW.
- **Expand and upgrade accommodation** across the state adding 40,000 rooms.
- **Increase airline capacity** by 8.5 million seats.
- **Develop and drive demand** for compelling visitor experiences.

By investing in a sustainable and resilient visitor economy, NSW should not just aim for numbers – it is about shaping the future of the state as a premier global destination and visitor economy powerhouse.

¹ \$87 billion when compared to a scenario where market share is lost.

CHARTING THE COURSE: THREE PHASES TO \$91 BILLION

To achieve the 2035 stretch goal, NSW needs a steady 4.9% compound annual growth rate in visitor spending. This growth is projected to unfold over three pivotal phases – Transition to 2026, Take-off to 2030 and Sustainable Growth to 2035.

Transition Phase: Accelerating to \$59 billion by 2026

NSW is targeting a 4.5% compound annual growth in visitor expenditure to reach \$59 billion by 2026. International expenditure is forecast to soar by 12.7% annually as key markets like China rebound.

During this phase, Destination NSW, government partners, and the visitor economy ecosystem should collaborate to make NSW one of the world's top destinations for premier travel experiences, both domestically and internationally. The NSW Government should partner with airlines and airports to increase flights from major markets and attract investment in new hotels and visitor attractions by streamlining planning processes.

By enhancing visitor experiences and accessibility, NSW will pave the way to becoming the world's premier travel choice.

Take Off: Soaring to new heights by 2030

With the opening of Western Sydney International Airport in late 2026, the visitor economy growth momentum will accelerate dramatically. Visitor spending is set to grow at 5% annually, reaching \$71 billion by 2030 – surpassing the original 2030 strategy's goal by \$6 billion. In this phase, both domestic and international expenditures is projected to rise in tandem, fuelling unprecedented growth.

Sustainable Growth: 2031-2035 – Sustain and thrive

NSW will need to achieve a steady 5% annual growth rate to reach \$91 billion in visitor spending by 2035. Domestic markets are forecast to slightly outpace international ones (5.3% vs. 4.4%). This phase needs to unlock the benefits of streamlined planning, introducing new world-class products and experiences – driving the NSW visitor economy fast forward.

DUAL ENGINES OF GROWTH: DOMESTIC AND INTERNATIONAL MARKETS DRIVE NSW'S FUTURE

Domestic market: Powering growth

The domestic market is the engine of NSW's visitor economy, projected to generate \$68 billion – a significant 74% of total visitor expenditure by 2035. NSW intrastate overnight visitors lead the way, contributing 34%, which is more than all interstate markets combined (22%).

Queensland and Victoria are our priority interstate markets, expected to deliver over 70% of interstate spending.

Daytrip visitors contribute diversity and sustainability, supporting year-round visitation. By 2035, we anticipate over 101 million daytrip visitors spending \$17 billion – 18% of total expenditure – especially benefiting destinations within a two-hour drive of NSW's major cities.

BELOW: Hope Estate, Hunter Valley.
Photo: Destination NSW.

International markets: Expanding NSW's global reach

International visitors are set to contribute \$24 billion (26% of the total visitor expenditure) by 2035. NSW will achieve this by focusing on sustainable, high-value growth markets.

The key is a balanced mix of Eastern and Western markets, aligned with aviation opportunities. China remains our largest market in both value and volume, though growth is more moderate post-COVID. NSW is tapping into high-growth potential in Southeast Asia, including Indonesia and India, and actively promoting regional NSW to international travellers.

NSW should be inviting the world to experience its compelling and unforgettable visitor experience offering.

Core international markets

- **Established markets:** China, USA, UK, South Korea, New Zealand, Japan, India, Hong Kong, Singapore, Germany, Indonesia, Malaysia, Taiwan.
- **Emerging markets:** Vietnam, Canada, France.

By strategically targeting these markets, NSW will forge an inspiring future: to become the destination of choice for travellers worldwide.



ELEVATE THE VISITOR ECONOMY TO BE A WHOLE-OF-GOVERNMENT PRIORITY

The visitor economy is a powerhouse in NSW, ranking 5th among the state's largest employment sectors. It supports over 116,000 businesses and more than 292,000 jobs, making it NSW's largest services export earner. In 2022/23, the sector contributed a significant \$38.2 billion (5% of GSP) to the economy, accounting for 2.4% of the state's total output.

Built on NSW's stunning natural beauty, rich First Nations heritage, and vibrant arts, culture, and sports scenes, the visitor economy is essential to the state's prosperity and community wellbeing. It fosters pride, social cohesion, and celebrates our diverse culture.

Stakeholders agree: making the visitor economy a whole-of-government economic priority can unlock immense potential — much like the mining sector. Recognising its value at all government levels and publicly championing it as a key driver of growth will amplify its impact.

By ensuring every policy decision considers the visitor economy and that investments enhance rather than hinder it, NSW can fully harness its potential and secure a thriving and prosperous future.

Opportunities to explore

- Ensuring policies, programs, investment, and engagement across all relevant government agencies and departments are coordinated to grow the visitor economy.
- Investigating opportunities to streamline planning, develop new visitor experiences, support new accommodation and visitor attractions, and drive growth through partnerships and collaborative marketing.

BELOW: Balloons Aloft, Hunter Valley.
Photo: Destination NSW.



ADOPT AN EXPERIENCE-LED STRATEGY TO GROW MARKET SHARE

NSW should adopt an experience-led strategy, informed by global consumer demand, to boost its market share.

Visitors today seek more than just arriving at and seeing an iconic destination that they could see online or through social media — they want authentic connections with local culture, stunning landscapes, delicious food, a spontaneous night out and enriching, memorable moments. This is 'experience tourism'.

Top travel drivers for NSW residents and interstate and international visitors are areas where NSW can win and grow market share:

- NSW residents: good food and wine (43%), coastal and beach experiences (40%), history and heritage (30%) and great shopping (27%)
- Interstate visitors: good food and wine (43%), coastal and beach experiences (40%), history and heritage (31%) and road trips (30%)
- International visitors: locations that offer beautiful natural environments (31%), good food and beverages (27%), natural wonders (22%) and culturally significant sites (19%).

By highlighting NSW's strengths in these areas, NSW can deliver the meaningful, sustainable, and personalised experiences that travellers will come back for repeatedly, positioning NSW as the ultimate destination for unique, memorable journeys.

Opportunities to explore

- Elevating the importance of visitor experiences in the Visitor Economy Strategy 2035.
- Establishing an investor attraction program for signature experiences.

BELOW: Private dining room at Berrima Vault House.
Photo: Destination NSW.



RESPECT AND CELEBRATE OUR FIRST NATIONS CULTURE – UNIQUE AUSTRALIAN EXPERIENCES

NSW should further respect and celebrate its First Nations people and culture by encouraging and enabling authentic visitor experiences and business opportunities that showcase its rich heritage. Valued highly by international and local travellers alike, these experiences offer deep connections to First Nations culture and place.

First Nations leaders are committed to preserving their traditions through language and storytelling, sharing their unique culture with the world, and fostering social and economic opportunities that empower their communities.



Opportunities to explore

- Embracing First Nations culture through business opportunities and authentic storytelling.
- Listening and deep engagement with First Nations stakeholders for the co-design of business support and experience development programs.
- Engaging in respectful consultation to establish a First Nations cultural centre that honours and celebrates the world's oldest living culture.
- Collaborating with Aboriginal Affairs to streamline NSW Government grants and support for First Nations visitor economy initiatives.
- Involving First Nations communities to incorporate their welcomes and cultural insights into NSW Government visitor materials and collaborating with storytellers to enrich NSW's marketing with authentic perspectives.
- Collaborating with First Nations communities to create a compelling welcome message at NSW airports, offering visitors an authentic cultural connection upon arrival.
- Partnering with First Nations communities to showcase NSW's rich heritage by highlighting native foods, connection to Country, and vibrant cultural experiences in visual and performing arts.



TOP: Blak Markets on Bare Island, La Perouse. ABOVE: Wajaana Yaam Adventure Tours, Coffs Harbour. NEXT PAGE: Southbound Escapes, Narooma. Photos: Destination NSW.



Supply side innovation: Building a future-ready NSW



TRANSFORM NSW'S ACCOMMODATION TO MEET FUTURE DEMAND

To reach the 2035 stretch goal, NSW needs 40,434 new rooms, with 75% required in Greater Sydney. Regional NSW, too, must elevate accommodation quality to boost occupancy, meet visitor expectations, and encourage longer stays.

There is a significant opportunity for NSW to expand its signature experiential, luxury and upscale offerings, delivering aspirational visitor experiences. By streamlining planning and attracting investment, NSW can cement its position as a world-class destination.

Opportunities to explore

- Streamlining planning and enhanced government collaboration to encourage private sector investment in visitor economy infrastructure and visitor experiences.
- Designating development sites and an investment attraction program for new signature experiential accommodation across NSW.

INVEST IN FUTURE-READY VISITOR ECONOMY INFRASTRUCTURE

During consultation, stakeholders stressed the importance of upgrades to roads, rail, and digital connectivity to support NSW's visitor economy now and to drive it forward into the future. Better infrastructure is critical for delivering world-class visitor experiences and delivering growth.

Destination NSW has begun prioritising key visitor economy infrastructure projects. The next step is aligning these with statewide plans.

Opportunities to explore

- Integrating visitor economy infrastructure priorities into the State Infrastructure Strategy.
- Prioritising visitor economy infrastructure around Western Sydney International Airport to unlock the growth potential of the new air gateway.

BELOW: Western Sydney Conference Centre.



FUEL NSW'S EXPERIENCE-LED VISITOR ECONOMY

To meet current and future demand, NSW should support 'experience tourism' product development across the state, focusing on areas of experiential strength and competitive advantage.

Stakeholders strongly back an experience-driven visitor economy, urging the government to prioritise key infrastructure and facilitate private investment in both Sydney and regional areas.

For First Nations visitor experiences, deeper engagement, co-design, and streamlined support are critical to empowering communities and businesses, with improved coordination across government agencies.

Opportunities to explore

- Investigating a statewide visitor experience development fund linked to NSW strengths.
- New partnerships between Destination NSW, National Parks and Wildlife Service, and Crown Lands to develop signature experiences in nature.
- Examining ways to integrate cutting-edge technology into visitor experiences.

BELOW: Western Sydney International Airport.

BOOST AVIATION CAPACITY FOR GROWTH

To achieve the 2035 stretch goal, NSW needs 8.5 million extra airline seats — 3.7 million international and 4.8 million interstate. The new Western Sydney International Airport, opening in late 2026, along with growing airports, like those in Newcastle and the Gold Coast, will be game-changers, offering a competitive edge for sustainable growth.

Sydney Kingsford Smith Airport will remain vital, and regional airports will continue to play a crucial role in visitor dispersal and destination development.

There is a pressing need to address issues like aviation capacity constraints to maximise NSW's connectivity to visitor source markets and realise the growth potential.

Opportunities to explore

- Developing a statewide aviation strategy to guide sustainable aviation growth.
- Establishing a funding program to boost aviation capacity from key markets.
- Collaborating with the Australian Government on implementing the Aviation White Paper.
- Supporting the development of Sustainable Aviation Fuel to drive sustainable aviation and reduce emissions.



Leveraging events: Seasonal triggers and building brand

UNLOCK NSW'S LEISURE EVENTS POTENTIAL

NSW's \$2.8 billion leisure events sector is a key driver of the visitor economy, boosting seasonal visitation and enhancing the state's appeal. Though accounting for approximately 5% of visitor expenditure, these events are crucial for showcasing NSW's unique offerings, building the state's brand for the types of experiences identified earlier, dispersing visitation across regions and seasons, and attracting new and repeat visitors.

To maximise this impact, NSW needs a dynamic, diverse events calendar, which highlights local strengths and culture. A unified whole-of-state event strategy will support operators, streamline planning, and encourage collaboration. Addressing rising costs, regulatory challenges, and venue limitations is essential.

Investing in regional events and aligning them with broader visitor economy programs will amplify the economic and social benefits, while prioritising sustainability will contribute to social licence, meet evolving ESG standards and attract top talent.

Opportunities to explore

- Creating a dynamic, year-round calendar of signature events that spans all seasons.
- Developing a new event support structure with transparent funding criteria and performance metrics, including new event classifications which allow for more strategic event investment and a focus on a key group of foundation events that are anchors to the state's event calendar.
- Aligning NSW events with visitor experience priorities, consumer demand and ambitions for growth.

POSITION SYDNEY AND NSW AS AUSTRALIA'S BUSINESS EVENTS CAPITAL

Sydney and NSW, generating \$686 million in business event visitor spending, have untapped potential to lead Australia's business events sector. Key growth opportunities lie in sectors like science, technology, manufacturing, and agriculture, particularly in Western Sydney and regional NSW.

Aligning with NSW Government priorities can drive investment, trade, and talent attraction, while encouraging global companies headquartered in Sydney to host local events could further boost the sector.

Challenges include a lack of suitable conference venues in Western Sydney, Sydney, and regional hubs. Amid growing ESG mandates, carbon reduction strategies like Sustainable Aviation Fuel will be essential. Expanding Business Events Sydney's remit to Western Sydney could unlock a crucial market for smaller conferences and other business events.

Opportunities to explore

- Reviewing the NSW business events strategy to leverage growth opportunities.
- Strengthening Business Event Sydney's reach to include Western Sydney.
- Investigating new business events infrastructure in key centres.

Igniting demand: Showcasing NSW's appeal

DRIVE DEMAND FOR NSW'S UNIQUE EXPERIENCES THROUGH EXCEPTIONAL MARKETING AND STORYTELLING

To drive demand and deliver an experience-led strategy, exceptional marketing and storytelling will be key. A refreshed approach to marketing Sydney and NSW will showcase NSW's visitor experience strengths to captivate visitors and highlight what makes the state truly unique and desirable from a visitation perspective.

Opportunities to explore

- Refreshing Destination NSW's marketing strategy to focus on 'experience tourism', aligning with the state's strengths and key drivers.
- Using cutting-edge technology and optimised channels to engage target audiences effectively.
- Strengthening storytelling around NSW's diverse experiences to resonate with travellers' motivations.
- Driving regional dispersal and visitation growth through promotion of statewide touring routes.

ELEVATE BRAND SYDNEY BY SHOWCASING AUTHENTIC, LOCAL EXPERIENCES AND ENHANCING CONSUMER DISCOVERABILITY

Sydney's economic importance to NSW and Australia is undeniable. As the gateway for international visitors and a leader in business, leisure, and student visitor expenditure, Sydney is expected to contribute 52% of the 2035 visitor economy target. The new Western Sydney International Airport and surrounding developments present a significant opportunity for Western Sydney's growth.

Internationally, Sydney is Australia's top destination, renowned for its world-class food, vibrant city lifestyle, and iconic landmarks like the Sydney Opera House, Harbour Bridge, and stunning harbour. However, domestically, Sydney ranks 3rd behind Melbourne and the Gold Coast for holidays and short breaks over the next 12 months.

To boost Sydney's appeal, its narrative must evolve into experience-led storytelling, highlighting its unique precincts, arts, culture, and creative industries. Stakeholders emphasised celebrating Sydney's neighbourhoods and personalities, particularly Western Sydney, known for its cultural diversity and global cuisine. Rather than creating a separate brand, Western Sydney should be integrated into the broader Brand Sydney story.

Leveraging Sydney's 'First Light' culture — morning activities, wellness, and the vibrant brunch scene — and connection to First Nations storytelling can further enhance its authentic visitor experience.

BELOW: Sydney's Vivid Festival. Photo: Destination NSW.





REALIGN DESTINATION NSW'S RESOURCES WITH EXPERIENCE-LED STRATEGY

Since its establishment under the *Destination NSW Act 2011*, Destination NSW has focused on driving visitor economy growth predominantly through marketing and events. Post-COVID, its focus has shifted more to major event investment, but with future visitation growth forecast to come from the leisure sector, a rebalancing of resources is needed.

To achieve the 2035 stretch goal, Destination NSW must realign its budget and programs to support a new experience-led strategy, focusing on experience development, aviation attraction, storytelling and collaborative marketing.

Opportunities to explore

- Realigning Destination NSW's budget and programs to support the 2035 visitor expenditure stretch goal.
- Refocusing Destination NSW's organisational strategy on 'experience tourism'.
- Strengthening collaboration between Destination NSW, government at all levels, and visitor economy stakeholders to achieve shared goals.

Opportunities to explore

- Building on Sydney's iconic strengths by promoting its diverse precincts, multicultural communities, local celebrations, and cuisine for an authentic 'live-like-a-local' experience.
- Developing and promoting Greater Sydney's vibrant arts, culture, creative industries, nightlife, sports, and precincts through enhanced cross-government collaboration.
- Inviting visitors to experience Sydney's vibrant 'first light' culture, embracing a healthy lifestyle, exploring and immersing in natural beauty, and enjoying wellness activities.
- Leveraging Destination NSW and government agency communication channels to share a richer narrative about visiting Sydney and NSW.
- Using advanced AI technology to personalise and craft unique, engaging visitor experiences.

ABOVE: Hollywood Hotel in the HQ precinct in Surry Hills. Photo: James Shultz.

RIGHT: The Destination NSW cafe and meeting space at the International Convention Centre (ICC) in Darling Harbour, Sydney. Photo: Destination NSW.



MAXIMISE IMPACT WITH A STRONGER, COLLABORATIVE MARKETING PROGRAM

Destination NSW should supplement its resource base and enhance marketing efforts by pursuing private sector investment and commercial partnerships throughout the state's visitor economy.

Funded through co-investment, integrated marketing campaigns will highlight NSW's visitor experience strengths, maximising economic and social benefits and extending this impact statewide.

Opportunities to explore

- Planning and executing new domestic and international cooperative initiatives across experience-led campaigns, events, aviation and drive touring.
- Collaborating with government stakeholders including the Cultural Institutions to better showcase the state's rich arts, culture and creative industries offering.



ABOVE: The John Dynon Gallery, Silverton.
RIGHT: Students outside the State Library of NSW.
Photos: Destination NSW.

LEVERAGE NSW'S STATUS AS THE PREMIER DESTINATION FOR INTERNATIONAL STUDENTS

NSW is Australia's top study destination, attracting 43% of all international students. In 2023, more than 187,000 students spent 24 million nights and contributed \$4.4 billion to the visitor economy. This high-value segment accounts for approximately 40% of NSW's international visitor spending, despite representing only 5.5% of visitors.

International students build strong connections to NSW, returning as leisure visitors and business investors. Additionally, visits from friends and family further boost the visitor economy.



Opportunities to explore

- Advocating to the Australian Government for policies that are favourable to international education.
- Strengthening NSW's global appeal as the top international education destination through closer collaboration between Destination NSW, Study NSW, and the international education sector.
- Creating a student welcome pack with offers that encourage international students to experience more of Sydney and NSW.

Enablers: Key drivers for sustainable growth



CHAMPION SUSTAINABILITY IN THE VISITOR ECONOMY AND NET ZERO TARGETS

NSW can position itself as a leader in sustainable tourism by adopting local best practices, addressing demand for eco-friendly experiences, and reducing the carbon footprint of events to ensure the state remains attractive and resilient for future generations.

Collectively, visitor economy stakeholders need to strengthen the visitor economy's contribution to the state's sustainability goals, including net zero emissions by 2050, by focusing on environmental, social, cultural, and economic sustainability to protect natural resources, support communities, and enhance visitor experiences.

ABOVE RIGHT: Firescreek Winery, Holgate.
Photo: Destination NSW.



Opportunities to explore

- Promoting the use of locally sourced products and services across the sector.
- Exploring the concept of a 'regenerative receipt' model to support sustainability initiatives.
- Monitoring and reporting the carbon footprint of NSW's visitor economy.
- Implementing plastic-free initiatives and sustainability criteria in grant and event investment agreements.
- Supporting NSW's EV strategy by developing and promoting drive touring experiences.
- Establishing a viable Sustainable Aviation Fuel supply chain to drive sustainable visitor economy growth.

REDEFINE SUCCESS MEASURES FOR NSW'S VISITOR ECONOMY

Roundtable participants called for success metrics that go beyond economic indicators, supporting a more transparent 'triple bottom line' approach. In response to evolving consumer expectations, there was also strong backing for metrics that measure cultural impact, community connection, wellbeing, and environmental sustainability.

While economic outcomes like expenditure and job creation will remain key priorities for the NSW Government in evaluating visitor economy performance, the focus should widen to include sustainability benefits across social, community, and environmental areas.

Expanding these metrics will enable a more holistic approach to visitor economy growth in NSW.

Opportunities to explore

- Collaborating with NSW Government agencies and visitor economy stakeholders to develop shared economic, social, and environmental metrics that guide policy and program delivery for balanced, sustainable outcomes.
- Evaluating global and national wellbeing frameworks to incorporate best practice into NSW's visitor economy strategy.



ABOVE: CoastXP, Newcastle.
Photos: Destination NSW.

DESTINATION NSW TO DELIVER STATEWIDE VISITOR ECONOMY DATA SOLUTION

Destination NSW should create a statewide data solution to deliver timely visitor economy insights for stakeholders across the state. Current data sources, while useful, are often delayed and lack local detail, inhibiting effective planning.

With many stakeholders relying on expensive third-party data, the Destination NSW-led solution should offer advanced analytics to better understand visitor trends, optimise marketing, and enhance the development and delivery of visitor experiences.

This initiative will also boost transparency by sharing data from Destination NSW platforms, enabling local governments and stakeholders to make informed decisions and improve regional planning.



Opportunities to explore

- Identifying an approach to providing stakeholders with richer, more detailed, timely data and insights to support business planning and operations.
- Coordinating research resources across the Department of Creative Industries, Tourism, Hospitality and Sport to ensure information assets support visitor economy growth.

BUILD A SKILLED AND DIVERSE VISITOR ECONOMY WORKFORCE

NSW's visitor economy supports nearly 300,000 jobs, with the potential to reach 450,000 by 2035. Staff shortages and skills gaps are an issue, forcing many visitor economy businesses to cut operating hours; a situation frequently exacerbated by limited, affordable worker accommodation.

Many young people are pursuing trades and agriculture instead of jobs in the visitor economy. There is also a growing demand for –but shortage of – First Nations guides.

To address these challenges, there is a critical need to promote career opportunities in the visitor economy, engage a diverse workforce, and explore creative solutions like job pathways for school leavers, seniors, First Nations people and people with disability.

A focused and consistent approach to workforce and skills challenges is needed to strengthen and diversify NSW's visitor economy.

Opportunities to explore

- Identifying and developing programs to address workforce challenges and skill gaps.
- Extending collaboration between Destination NSW, TAFE NSW and Department of Education on targeted programs specific to the visitor economy.
- Advocating to the Australian Government for support for visitor economy workforce programs and the Working Holiday Maker Visa scheme.
- Enhancing visitor economy capability building through Destination NSW's NSW First program.
- Showcasing career opportunities in the visitor economy through inspirational marketing and storytelling targeting school leavers, seniors, First Nations Australians and people with disability.
- Promoting third-party and Australian Government digital job search platforms.

ENHANCE THE VISITOR EXPERIENCE THROUGH TECHNOLOGY INNOVATION

There is a significant, untapped opportunity to leverage NSW's technology and innovation strengths to transform the visitor economy by turning static experiences into interactive, unforgettable moments. Embracing technology will not only bring NSW's stories to life but also enhance convenience and deliver better outcomes for visitors and visitor economy businesses alike.

Opportunities to explore

- Partnering with NSW venues, cultural institutions, and the private sector to integrate cutting-edge technology into exhibitions, tours, and attractions, creating interactive, immersive visitor experiences.



ABOVE: Children wearing Oculus Rift VR goggles and having a virtual experience at the Blue Mountains Heritage Centre, Blackheath.

LEFT: Service at Henri Marc cafe, Penrith.

NEXT PAGE: Unique accommodation at Love Cabins in the Blue Mountains.

Photos: Destination NSW.





