



NSW

VISITOR  
ECONOMY  
STRATEGY

2035



Destination  
NSW



# TRENDS



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# ACKNOWLEDGEMENT OF COUNTRY

The NSW Government acknowledges the Traditional Custodians of the lands, skies and waters of New South Wales.

For tens of thousands of years, their care and connection have sustained life and culture. We pay our respects to Elders past and present, whose wisdom continues to inspire and guide future generations.

We recognise the profound role of Aboriginal people in caring for Country and celebrate their culture, stories and languages, which are central to the identity and vibrancy of NSW. Their enduring custodianship enriches our natural and cultural landscapes, offering unique experiences that attract visitors from around the world.

We honour this legacy and commit to a genuine partnership with Aboriginal communities – ensuring their voices are heard and that their culture, stories and perspectives are woven into the NSW visitor economy. Together, we aim to build a future that celebrates this rich, unique heritage and fosters an inclusive, sustainable and respectful visitor economy.

# A MESSAGE FROM THE PREMIER OF NSW

The NSW Government is proud to present a bold new vision for the state's visitor economy – one that sets the stage for transformative growth and long-term prosperity.

We've set an ambitious target of \$91 billion in visitor expenditure by 2035, and the NSW Visitor Economy Strategy 2035 provides a clear roadmap to get us there.

The visitor economy is more than just tourism. It includes accommodation, dining, and major sport, cultural, arts and business events. It supports hundreds of thousands of jobs and drives economic development across both metropolitan and regional NSW.



**The Hon Chris Minns MP**  
Premier of NSW

Achieving our vision requires a whole-of-government approach. This strategy outlines coordinated actions across five strategic pillars to unlock growth and deliver results. We will continue our work closely with the sector to build a resilient, agile and sustainable visitor economy – one that delivers benefits across the entire state.

With some of the world's best destinations, experiences and events, NSW is uniquely positioned for success. We will continue to strategically invest to attract visitors and keep them coming back; and inspire longer stays.



# A MESSAGE FROM THE MINISTER FOR JOBS AND TOURISM

I am pleased to present the NSW Visitor Economy Strategy 2035 – our bold, new plan to grow the visitor economy and shape the future of tourism in New South Wales.

This strategy is the product of extensive consultation, and I'd like to thank the many stakeholders who contributed their insights during the comprehensive review. Your input has been invaluable.

We've not only set a clear target of \$91 billion in visitor expenditure by 2035 – we've identified what needs to happen on the supply side to make it a reality. This includes delivering an additional 8.5 million aviation seats, 40,400 new accommodation rooms and 150,000 new jobs across the visitor economy.

We've already taken a number of steps in response to early recommendations from the review. Two new aviation support programs – the NSW Take Off Fund and the Western Sydney International Take-Off Fund – have launched with more than \$20 million in combined funding to attract new air services into NSW.

We're also investing in data and insight. Destination NSW has partnered with CommBank IQ to unlock powerful spending data, enabling government and industry to understand where visitors come from and how they spend – supporting smarter, faster decision-making and better visitor experiences.

To help businesses thrive during major events, we've extended trading hours for pubs, bars and clubs on select occasions – part of our broader commitment to delivering a vibrant 24-hour economy. And we will continue to invest in a world-class calendar of events that drives visitation and delivers economic, social and cultural returns.

Importantly, this strategy places strong emphasis on immersive, authentic visitor experiences. NSW's natural strengths – from our coastline and landscapes to our food and wine – provide the perfect platform to lead the next evolution of experience tourism.

Destination NSW will continue to support experience development across the state, working with visitor economy businesses to develop, promote and sell compelling visitor experiences.

These are just some of the many initiatives underway as we set our sights on transformative growth. Our priorities remain clear: enhancing the visitor experience, unlocking opportunities, embracing innovation, fostering collaboration, championing inclusion and advancing sustainability.

I'm incredibly excited for the decade ahead – and proud to be part of the team working to ensure NSW remains Australia's leading visitor economy.



**The Hon Steve Kamper MP**  
Minister for Jobs and Tourism



# VISION FOR THE NEW SOUTH WALES VISITOR ECONOMY TO 2035

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## VISION

To inspire the world with destinations, experiences and events which compel visitors to stay longer, do more and return again and again.

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## GOAL

**\$91 billion in visitor expenditure by 2035**

**Increase market share by leveraging NSW's competitive strengths**

- Achieve a compound annual growth rate of 4.9% in visitor expenditure.
- Strengthen NSW's association with key experience attributes to enhance brand consideration.

**Ensure supply meets growing demand**

- Deliver an additional 8.5 million aviation seats.
  - Add 40,400 new accommodation rooms statewide.
  - Support 150,000 new jobs across the visitor economy.
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## STRATEGIC PILLARS

- Make it easy for more people to visit
  - Focus on attracting visitors
  - Drive growth through events
  - Focus on experiences
  - Leverage data and insights
- 

## GUIDING PRINCIPLES

- Prioritise the visitor experience
- Drive innovation and agility
- Embed sustainability
- Support the industry
- Foster collaboration and partnerships
- Ensure accountability and inclusion



# STRATEGIC PILLARS



Make it easy  
for more  
people to visit

**Objective**

Drive growth in the visitor economy by fostering strong partnerships, attracting investment and building a skilled workforce.

**Key result areas**

- Additional aviation seats
- Additional rooms
- Additional jobs
- Growth in visitor expenditure



Focus on  
attracting  
visitors

**Objective**

Position Sydney and NSW as must-visit destinations by connecting visitors with compelling locations and experiences and igniting demand through rich storytelling.

**Key result areas**

- Brand awareness and consideration
- Improvement in association scores with key experience attributes



Drive growth  
through events

**Objective**

Leverage and attract world-class entertainment, sport, cultural and business events to drive visitation, deliver economic, social and cultural benefits, stimulate regional growth and foster innovation in the knowledge economy.

**Key result areas**

- Increased economic contribution from entertainment, sport, cultural and business events portfolio
- Regional dispersal attributable to events



Focus on  
experiences

**Objective**

Position NSW as a global leader, attracting high-value travellers and driving repeat visitation through the growth and development of immersive, authentic travel and a strong events calendar.

**Key result areas**

- Visitor satisfaction and repeat visitation
- Regional dispersal of visitors and spending



Leverage data  
and insights

**Objective**

Build a data-driven, insight-led visitor economy that enables agile decision making, delivers enhanced experiences and fosters growth.

**Key result areas**

- Increase stakeholder access to data and insights
- Increase in engagement rates on digital channels





# GUIDING PRINCIPLES



## Prioritise the visitor experience

Leverage consumer insights to inform the delivery of superior experiences that meet visitors' needs and drive satisfaction and return visitation.



## Drive innovation and agility

Embrace emerging technologies, foster creativity and pioneer new solutions to keep NSW's visitor economy competitive, agile and future-ready.



## Embed sustainability

Embed sustainability by prioritising low-impact tourism, climate resilience and eco-friendly practices through industry and community partnerships.



## Support the industry

Build a resilient and agile visitor economy by embedding responsive planning, risk management and crisis-recovery strategies for long-term stability.



## Foster collaboration and partnerships

Deepen collaboration between government, industry and communities to align strategies, attract investment and drive sustainable growth.



## Ensure accountability and inclusion

Set measurable goals, ensure transparency and embed diverse perspectives to foster inclusion and ensure integrity across the visitor economy.



# THE NSW VISITOR ECONOMY STRATEGY 2035

With a bold vision to inspire the world through destinations, experiences and events, the NSW Visitor Economy Strategy 2035 (the Strategy) sets the stage for transformative growth.

By leveraging global trends, fostering collaboration and focusing on industry development and economic growth, NSW will continue to lead tourism in Australia, securing long-term prosperity for its people, places and economy.





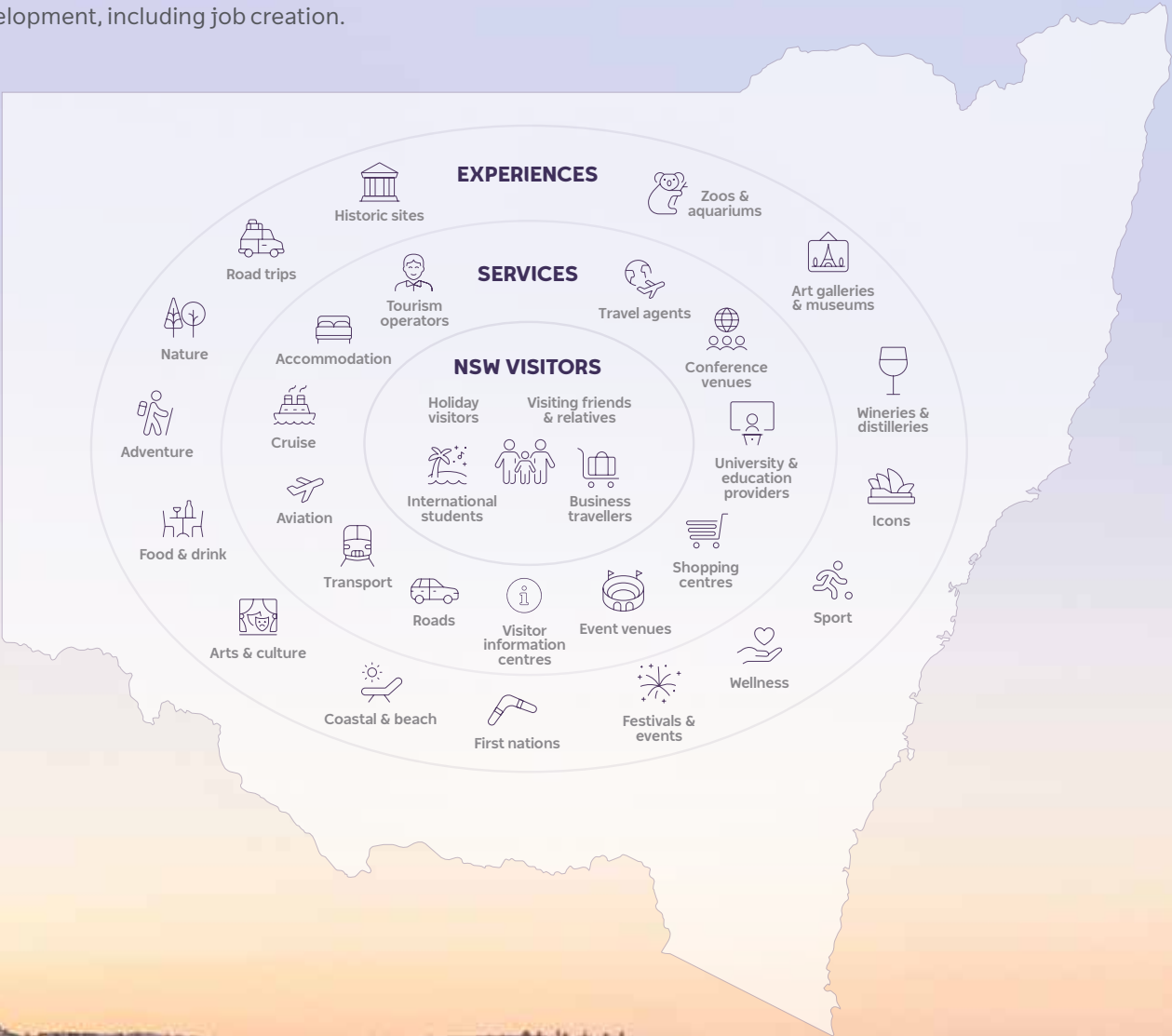
# THE VISITOR ECONOMY ECOSYSTEM

The visitor economy in NSW extends far beyond traditional tourism. It comprises a vibrant ecosystem that includes accommodation; dining; retail; major sports, arts, culture, leisure and business events; and transport – thriving on the direct and indirect contributions of people travelling for leisure, visiting family and friends, business, study and more.

The visitor economy is a significant lever for economic development, including job creation.

The visitor economy’s unique contribution is that its impact is felt across both NSW’s metropolitan and regional areas.

The success of NSW’s visitor economy is a shared endeavour, shaped by visitors, businesses, governments and residents alike. Achieving growth, economic resilience and vibrant communities depends on everyone’s participation and collaboration.



# NSW: A VISITOR ECONOMY POWERHOUSE

The NSW Government has set a bold stretch goal of \$91 billion in annual visitor expenditure by 2035.

This cements the visitor economy as a whole-of-government and whole-of-industry priority, with a need to focus on creating and converting demand, improving supply, delivering events and industry development to achieve this goal.

By aligning efforts across sectors and championing beautiful locations, authentic tourism and world-class events, NSW will continue to thrive from the economic, social and cultural benefits the visitor economy delivers. Encouraging and supporting private sector investment, including small businesses, will also assist in unlocking further economic growth.

Achieving the \$91 billion expenditure stretch goal will create significant economic value over the next decade, reinforcing the visitor economy as a key driver of jobs, investment and statewide prosperity.

The path to achieving the goal follows across three key phases.

## Transition phase to 2026

**Target:** \$59 billion in visitor expenditure by 2026.

### Growth driver:

- International visitor expenditure is forecast to grow more than 10% annually, driven by the continual recovery of key markets.
- Expanding aviation capacity by partnering with airlines and airports to open new routes and increase flight frequency.

- Accelerating infrastructure investment through streamlined planning processes for new accommodation, attractions and visitor experiences.
- Supporting the development of experiences that align with visitor demand.

## Take-off to 2030

**Target:** \$71 billion in visitor expenditure by 2030.

### Growth driver:

- The opening of Western Sydney International Airport in late 2026, turbocharging visitation growth.
- Domestic and international visitor expenditure is expected to grow at comparable rates, reflecting balanced growth across the sector.
- Continued support for the development of experiences that align with visitor demand.

## Sustainable growth to 2035

**Target:** \$91 billion in visitor expenditure by 2035.

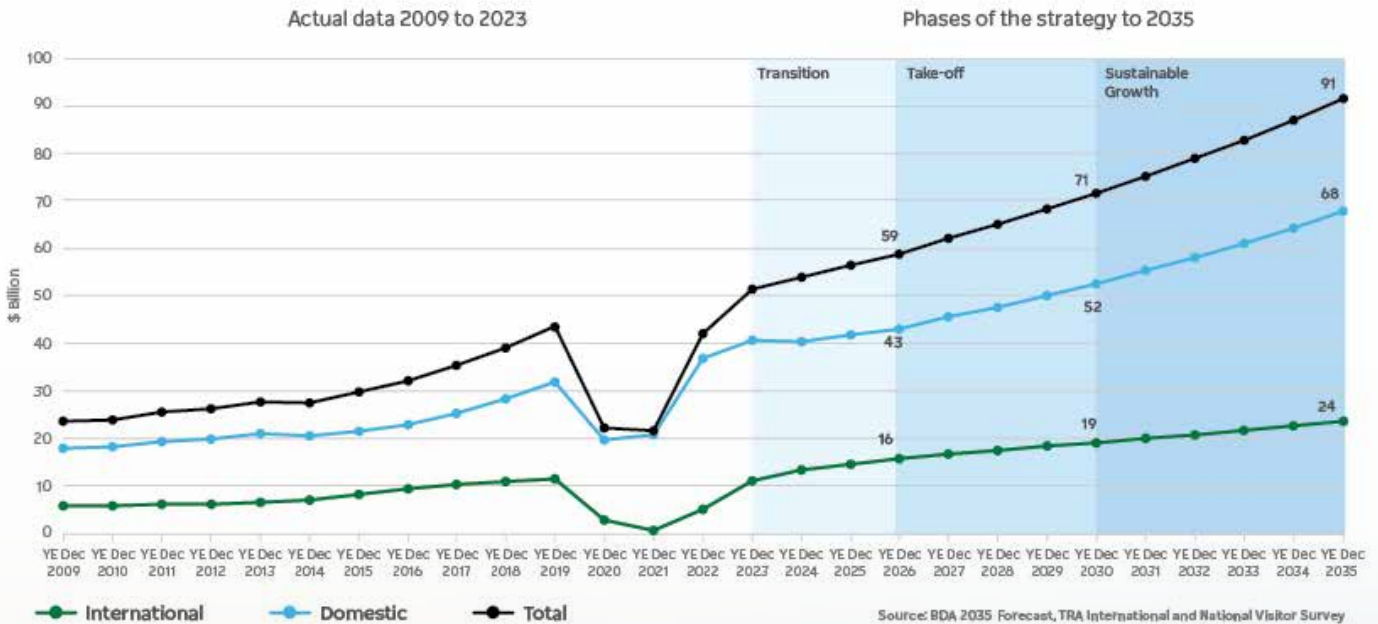
### Growth driver:

- Realising the potential of a streamlined planning system to deliver new, world-class accommodation, attractions and experiences.
- Ensuring resilience and inclusivity by embedding sustainability, accessibility and innovation across all visitor economy sectors.





## PHASES OF THE STRATEGY TO 2035



## OUR JOURNEY

In 2024, the *NSW Visitor Economy 2030* was reviewed. A summary of the review recommendations was released in October 2024.

The NSW Government has formally adopted the headline goal recommended by the review – \$91 billion visitor economy by 2035 – and acknowledged the related accommodation and aviation capacity supply needs. The NSW Government has also adopted the Visitor Economy Strategy 2035 as a whole-of-government economic priority, replacing the former NSW Visitor Economy Strategy 2030.

This Strategy captures actions that will rely on the cooperation, passion, engagement and support of visitor economy stakeholders across NSW for delivery, including local councils, tourism operators, Destination Networks, event owners and investors and developers.

Although Destination NSW will lead delivery of the Strategy, it will partner with others across the NSW Government to ensure success, including the Department of Planning, Housing and Infrastructure; Transport for NSW; NSW Treasury; and others.

The strategic pillars and actions in this Strategy will ensure that limited public resources can be prioritised effectively to have maximum impact, while also encouraging and facilitating private sector investment.



# PRIORITY MARKETS

## INTERNATIONAL MARKETS

NSW wants to leverage the great opportunity presented by the continued recovery of international travel. This means realising the full potential of existing strongly performing markets and leaning into markets where there is great growth potential.

When compared to domestic visitor spending, international market spending will grow at a faster pace, contributing \$24 billion – 26% of total visitor expenditure – by 2035.

### Priority international markets

Star performing	Grow	Maintain	Emerging
China	India	Singapore	Canada
USA	Hong Kong	Malaysia	Vietnam
UK	New Zealand	Germany	
South Korea	Japan	France	
	Indonesia	Taiwan	

These markets will be reassessed over the life of the Strategy.

## DOMESTIC MARKETS

The domestic market is the backbone of NSW’s visitor economy, projected to generate \$68 billion in visitor expenditure by 2035 – 74% of total visitor expenditure.

In the Transition phase of the Strategy, domestic growth is forecast to slow due to weaker economic conditions and a peak in yield growth. Stronger gains are expected in the Take-off phase, followed by stable, sustainable growth in the Strategy’s final phase.

### Interstate

Growth in interstate markets is forecast to accelerate, particularly in the Take-off phase of the Strategy. Queensland and Victoria will remain priority markets, historically generating over 70% of domestic interstate visitation.

### Intrastate

The intrastate market – comprising NSW residents travelling within the state – is the largest driver of visitor expenditure. Intrastate overnight visitors are expected to continue leading in expenditure, accounting for 34% of spending, well above the combined 22% share from interstate visitors.

### Daytrip visitors

By 2035, NSW is forecast to attract over 101 million daytrip visitors, contributing \$17 billion in expenditure. Daytrip visitation plays a crucial role in regional economies, particularly within a two-hour drive of Sydney and key regional hubs.





## FORECAST 2035 VISITOR EXPENDITURE



Source: BDA 2035 Forecast, purpose of visit splits based on 2019 averages. Figures are rounded.

# FOCUS DESTINATIONS

Sydney will always be a priority destination and a significant focus for the visitor economy. This Strategy will ensure that NSW leverages Sydney's strengths as Australia's global city.

Sydney is the gateway to NSW and Australia. Sydney is also a destination in its own right, delivering much of what visitors are known to want: iconic locations and experiences that leverage Sydney's natural and cultural assets, world-class events and opportunities to enjoy exceptional food and wine.

## Western Sydney

Western Sydney is undergoing a transformation driven by major infrastructure investments. This combined with the region's diverse communities, cultural vibrancy and expanding visitor infrastructure will cement its position as a leading destination for both domestic and international travellers.

Western Sydney is also a gateway to some important international markets due to the strong cultural and family connections to these international markets in some communities. Western Sydney's significant sporting and cultural infrastructure also positions the region to continue to deliver world-class attractions and events.

## Western Sydney International Airport

Opening in late 2026, the curfew-free Western Sydney International Airport will revolutionise travel, serving millions of passengers annually and positioning the region as a global gateway. With direct access to key destinations like the South Coast, Central West and Blue Mountains, the airport will unlock new visitor flows and economic opportunities.

## Aboriginal cultural tourism

There remains a great opportunity to grow Aboriginal-led tourism in Sydney, including Western Sydney. Supporting authentic Aboriginal experiences – from storytelling and cultural tours to On Country events – will create meaningful visitor connections and preserve living traditions.

## OUR ACTIONS

- 1. Reinforce Sydney as a destination and a gateway:** Create strategies to leverage Sydney as a destination and a gateway to encourage repeat visitation.
- 2. Enhance access and connectivity:** Leverage Western Sydney International Airport and improve transport infrastructure to seamlessly connect visitors to key destinations, including in regional NSW.
- 3. Reinforce Sydney, including Western Sydney, as an experience tourism hub:** Work with stakeholders to create unique attractions, events and immersive visitor experiences.
- 4. Showcase cultural diversity:** Promote events, festivals, and Aboriginal-led experiences that celebrate Sydney's rich multicultural communities.



📍 Splendour Tailored Tours, Sydney





📍 Tamworth Country Music Festival

Regional destinations play a critical role in the visitor economy, sustaining jobs and driving economic growth. By 2035, 48% of the \$91 billion visitor expenditure stretch goal will be in regional NSW.

Continued investment in experience development, transport, accommodation, digital connectivity and regional marketing will ensure regional areas remain central to NSW's visitor economy.

Strong collaboration between the NSW Government, Destination Networks, Regional Development Australia, local councils and tourism businesses will drive investment, enhance marketing and expand NSW's appeal to both domestic and international visitors.

#### **Experience-driven travel in regional NSW**

From scenic road trips to eco-adventures in World Heritage-listed parks, regional NSW offers immersive, high-value visitor experiences that deepen connections with nature, culture and local communities, encouraging repeat visitation.

#### **Events and festivals: a catalyst for regional visitation**

Events such as sporting world cups, Tamworth Country Music Festival, State of Origin, Deni Ute Muster, Parkes Elvis Festival and Bathurst 1000 will boost local economies and attract off-peak visitation.

#### **Improving access and connectivity**

Strategic investment in transport, event and digital infrastructure is key to unlocking regional tourism's

full potential. Upgrades to roads, rail and regional airports, alongside Western Sydney International Airport's future connectivity will enhance access.

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#### **OUR ACTIONS**

5. **Deliver immersive experiences:** Work with stakeholders to create authentic, high-value offerings that connect visitors with nature, culture and communities.
  6. **Enhance regional access and infrastructure:** Identify transport network upgrade needs, including road, rail, regional airports and regional event infrastructure.
  7. **Grow regional events and festivals:** Strengthen and showcase events that highlight priority experiences, to drive year-round visitation and economic benefits.
  8. **Strengthen stakeholder collaboration:** Work with Destination Networks, local councils and tourism businesses to drive investment, enhance regional marketing, build resilience and attract a diverse visitor base.
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# IMPORTANT SEGMENTS

International education is a key pillar of NSW’s visitor economy. As Australia’s top study destination, international students strengthen the NSW workforce, spurring innovation and fostering global connections.

## INTERNATIONAL EDUCATION

International students spend more than any other international visitor segment. Their presence fuels demand for accommodation, retail and hospitality, while visits from friends and family create additional economic benefits, particularly in regional NSW.

Maintaining competitive visa conditions and post-study work rights will be key to sustaining growth and attracting the next generation of international students to further cement NSW’s position as a premier study destination. This will underpin a strong, globally connected visitor economy.

## EXPERIENCE SEEKERS

Experience seekers are reshaping tourism. They seek authentic, immersive connections with the places they visit.

These visitors go beyond sightseeing and icons. They prioritise cultural engagement, discovery and sustainability. Attracting these travellers is central to leveraging the state’s rich heritage, diverse landscapes and distinctive experiences to drive long-term growth.

### What are Experience Seekers?

- **Culturally immersive:** Seek local connections and the chance to live like a local.
- **Adventurous and curious:** Prefer off-the-beaten-path experiences and discovery.
- **Growth-oriented:** Value travel that fosters learning, transformation and enrichment.
- **Sustainability-focused:** Choose eco-friendly, ethical tourism aligned with their values.
- **Experience-driven:** Engage in cultural festivals, culinary trails, nature-based adventures, sport and entertainment events and creative precincts.
- **High-value travellers:** Typically younger, tech-savvy and willing to invest in exclusive, quality experiences.



📍 Olympian Rock Lookout, Blue Mountains National Park





# STRATEGIC PILLAR ONE: MAKE IT EASY FOR MORE PEOPLE TO VISIT

Objective: Drive growth in the visitor economy by fostering strong partnerships, attracting investment and building a skilled workforce.

## AIR ACCESS: CONNECTING NSW TO THE WORLD

Aviation is a critical component of the supply chain for driving both domestic and international visitation, supporting regional dispersal and fuelling economic growth.

### Meeting future demand

By 2035, NSW will need an additional 8.5 million airline seats – 3.7 million international and 4.8 million interstate – to meet the visitor expenditure stretch goal. The opening of Western Sydney International Airport, along with expansions at Newcastle and Gold Coast airports, will provide critical capacity. NSW's future-ready aviation network will improve accessibility and solidify its position as Australia's primary air gateway.

### Expanding global connections

Direct flights from key markets, including Asia, North America and Europe, will broaden NSW's visitor base and support year-round visitation. Strategic airline partnerships will position Sydney as the gateway to NSW, connecting international visitors to the state's regional offerings.

### Investing in aviation infrastructure

Sydney Kingsford Smith Airport is a vital gateway and the opening of Western Sydney International Airport will increase capacity and streamline passenger flow into NSW. Investments in regional airports will improve access to remote areas, providing more opportunities for visitors to experience NSW's diverse regions and boost local economies.

## OUR ACTIONS

9. **Develop a Statewide Aviation Strategy:** Create a unified plan to drive investment in route development, connectivity, infrastructure, and sustainability, with clear goals for expanding international and domestic aviation capacity into NSW.
10. **Aviation and marketing support:** Focus on high-value regions with strong aviation links, including North and Southeast Asia and India while continuing to nurture high-yield western markets.
11. **Invest in partnerships:** Strengthen partnerships with airlines and stakeholder networks to boost conversion and dispersal.







♥ Love Cabins, Blue Mountains

## BUILDING A FUTURE-READY ACCOMMODATION SECTOR

Achieving the \$91 billion stretch goal will be dependent on satisfying the need for diverse, high-quality accommodation. By 2035, NSW will need an additional 40,400 rooms, with 75% of the demand concentrated in Greater Sydney. Regional NSW must also enhance its accommodation offering to support statewide visitor economy growth.

NSW must diversify its accommodation offerings, including family-friendly and boutique hotels, luxury resorts, eco-lodges, heritage stays, caravan parks and camping sites. Short-term rentals will further ensure inclusivity, offering options for all visitor segments.

### A focus on supply in Greater Sydney

Sydney will remain the focal point of accommodation supply through to 2035. This reflects Sydney's critical role as a destination and the gateway to NSW and Australia.

Focus will be given to what types of accommodation are needed and where, to ensure that accommodation growth in Sydney leverages its appealing destinations and relative accessibility.

### A focus on quality in Regional NSW

Regional NSW, with its significant untapped potential, requires upgraded, diverse accommodation to attract more visitors. Investments in eco-resorts, wellness lodges and premium retreats will promote regional dispersal, stimulate local economies and spread the benefits of the visitor economy across the state.

### A pro-investment strategy

The NSW Government is committed to accelerating growth in the accommodation sector by streamlining planning and simplifying approvals. These measures will attract private sector investment and ensure NSW is equipped with a diverse and high-quality accommodation portfolio to meet future demand and evolving visitor preferences.

## OUR ACTIONS

12. **Drive accommodation investment:** Attract private sector investment with a focus on Greater Sydney through streamlined planning and approvals and investigate the opportunity for targeted funding for accommodation upgrades in regional locations.
13. **Align with regional and infrastructure growth:** Collaborate with local governments to align accommodation projects with major infrastructure developments, like Western Sydney International Airport.





📍 Outback Geo Adventures, Balranald

## DEVELOPING A FUTURE-READY WORKFORCE

The tourism workforce is the backbone of the state's visitor economy, driving growth and exceptional experiences. To reach the \$91 billion visitor expenditure goal by 2035, the workforce must expand from 300,000 to 450,000. Addressing skill shortages, improving retention and adapting to visitor expectations are crucial for maintaining competitiveness.

### Addressing workforce challenges

The sector faces key challenges:

- Skills shortages in hospitality, transport and tourism services.
- Retention issues, particularly in regional areas.
- Need for upskilling to meet rising visitor expectations and emerging technologies.

Addressing these challenges will lessen the risk of reduced operating hours, particularly in regional locations.

### Equipping the workforce for the future

The NSW Government, through Destination NSW, TAFE NSW and industry leaders, is collaborating to:

- Close skill gaps in tourism and hospitality.
- Develop training in high-growth areas such as digital marketing and sustainability.
- Align credentials with industry needs.

These initiatives will ensure the workforce is adaptable and capable of meeting future demands while creating sustainable career pathways.

### Fostering diversity and inclusion

A diverse workforce reflects NSW's multicultural visitor base. Expanding opportunities for culturally diverse groups, Aboriginal Australians and people with disabilities is a priority.

### OUR ACTIONS

14. **Build sector talent and capability:** Develop targeted training and foster inclusivity to grow a skilled, diverse visitor economy workforce.
15. **Promote careers in the visitor economy:** Inspire new talent with campaigns highlighting rewarding career opportunities across the sector, targeting school leavers, career changers and underemployed workers.
16. **Support seasonal and mobile workforce strategies:** Create adaptable workforce programs to meet year-round demand in the visitor economy.





📍 Sylvan Grove Native Garden, Picnic Point

Sustainability and resilience are integral to the future of NSW's visitor economy, driving global demand for responsible travel and preserving NSW's natural and cultural heritage.

## SUSTAINABILITY: A RESILIENT FUTURE

In collaboration with stakeholders, the NSW Government is advancing initiatives to protect the environment, strengthen local economies and support communities, all while working towards the state's net-zero target by 2050.

### Reducing carbon footprints

The NSW Government is committed to reducing the visitor economy's carbon footprint. Actions include promoting renewable energy, energy-efficient technologies, waste reduction and carbon-neutral certifications, all designed to attract eco-conscious visitors and position businesses for a low-carbon future.

### Protecting natural assets

NSW's natural landscapes – coastlines, outback and ecosystems – are vital to its international and domestic appeal as a tourism destination. Continuing to align conservation and tourism by allowing visitors careful access across these landscapes, including in national parks and progressing investment in sustainable infrastructure and low-impact transport, will reduce environmental impacts and preserve biodiversity. These efforts will deepen visitor engagement with NSW's unique environments.

### Supporting regenerative and sustainable tourism

Regenerative tourism encourages visitors to actively contribute to preserving NSW's natural and cultural assets. Initiatives like reforestation, wildlife protection and cultural restoration will leave a positive, lasting impact. Meanwhile, the NSW Government's focus on Sustainable Aviation Fuel (SAF) will help decarbonise air travel, to support the state's positioning as a leader in green tourism.

### Embracing smart technology

Smart technology will help balance visitor growth with conservation efforts in sensitive environments like national parks. Tools such as near-time monitoring and visitor-flow management will enhance sustainability while improving the overall visitor experience

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## OUR ACTIONS

17. **Promote green aviation:** Drive Sustainable Aviation Fuel (SAF) adoption by incentivising local production, expanding SAF infrastructure and partnerships with airlines to reduce aviation emissions.
  18. **Accelerate carbon neutrality:** Support visitor economy businesses with renewable energy adoption, carbon-neutral certification and waste reduction practices.
  19. **Foster regenerative tourism:** Develop conservation projects and eco-tourism experiences in partnership with visitor economy stakeholders and Aboriginal communities.
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Chinatown, Burwood

## STRATEGIC PILLAR TWO: FOCUS ON ATTRACTING VISITORS

Objective: Position Sydney and NSW as must-visit destinations by connecting visitors with compelling locations and experiences and igniting demand through rich storytelling.

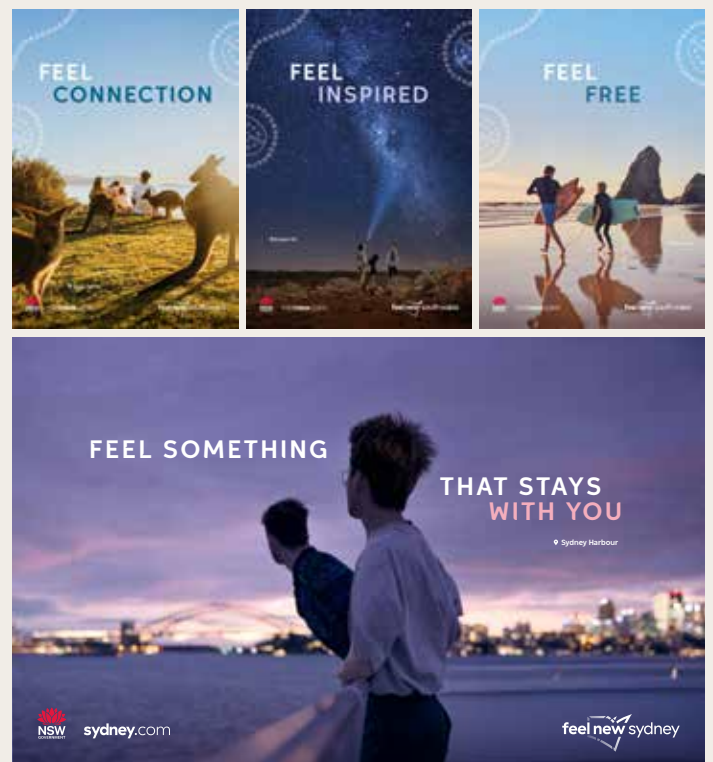
### THE POWER OF BRAND SYDNEY AND BRAND NSW

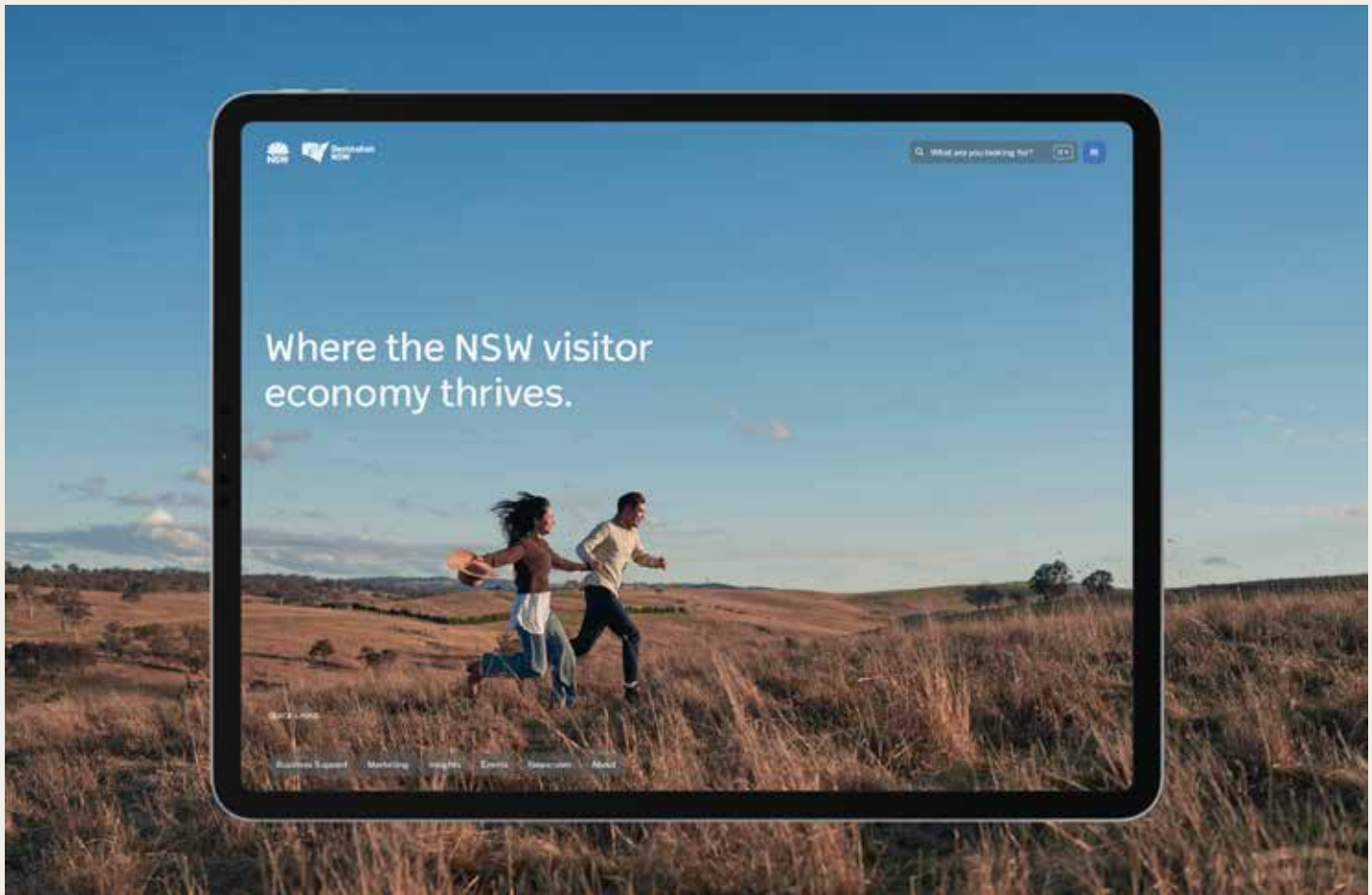
The growth of the visitor economy requires the supply of incredible locations, experiences, aviation capacity and accommodation to be met with demand from international and domestic visitors.

Demand should be deep and sustained. Visitors should stay longer, tell their family and friends and then plan to come back.

Sydney and NSW's visitor brands are the foundation of the state's visitor economy, shaping perceptions and cutting through a competitive landscape. Together, they offer two distinct yet connected visitor experiences:

- **Brand Sydney:** Set against the backdrop of our iconic harbour, beaches and surrounded by national parks, Sydney is a global city of culture, business and 24-hour energy, delivering urban sophistication, dynamic events, culture and culinary diversity.
- **Brand NSW:** With Sydney as the natural gateway, a showcase of diverse landscapes and cultural heritage, inviting visitors to explore the state's natural beauty and rich history.



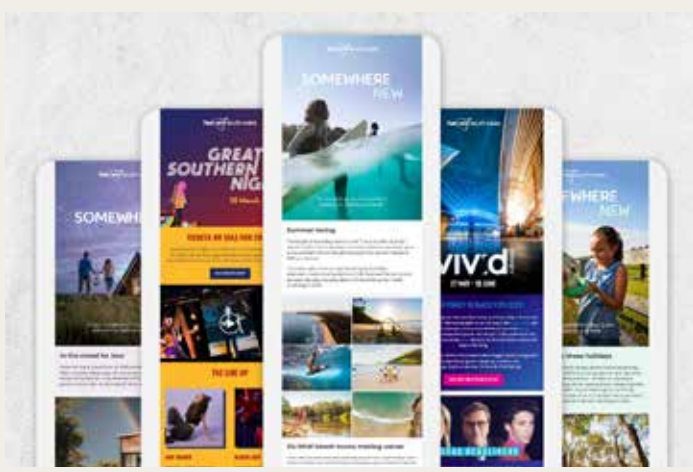


# CUTTING THROUGH THE COMPETITIVE LANDSCAPE

## Storytelling that resonates

The strength of a destination brand lies in the distinct, compelling stories it tells that reflect the unique identity of a place. The NSW Government’s strategy crafts authentic, high-impact narratives that connect emotionally with audiences, including international audiences, inspiring them to explore Sydney’s vibrant cityscape and NSW’s immersive regional experiences.

This approach balances the role of Sydney’s must visit icons and locations as a critical hook for travel across NSW, with a showcase of the depth of opportunities visitors can enjoy, whether that be events, cultural and heritage opportunities and nature-based experiences.



## Data-led marketing and digital innovation

AI and near-time data will enhance NSW’s marketing impact, delivering more effective, targeted and optimised campaigns that increase visitor spend, extend stays and drive repeat visitation. A digital-first strategy will help NSW remain a globally competitive destination by enhancing visitor experiences and engagement.

## OUR ACTIONS

20. **Deliver seasonal and targeted campaigns:** Partner with event owners, sporting codes, cultural institutions, regional tourism bodies and industry stakeholders to deliver campaigns that showcase distinctive experiences across NSW.
21. **Enhance the experience-driven brand narrative:** Position Sydney as a vibrant global city and NSW as a diverse, experience-rich destination, highlighting Aboriginal heritage, sustainability and immersive tourism.
22. **Engage global and local storytellers:** Work with media, influencers and Aboriginal communities to craft compelling stories that amplify Sydney and NSW’s unique appeal.
23. **Leverage innovation in marketing:** Integrate AI and data and leverage Destination NSW’s existing consumer channels to create compelling campaigns that enhance visitor engagement and increase NSW’s global reach.



# STRATEGIC PILLAR THREE: DRIVE GROWTH THROUGH EVENTS

Objective: Leverage and attract world-class entertainment, sport, cultural and business events to drive visitation, deliver economic, social and cultural benefits, stimulate regional growth and foster innovation in the knowledge economy.

## LEISURE EVENTS: CATALYSTS FOR GROWTH

Leisure events attract visitors, stimulate local economies, support jobs, reflect the state's identity and enhance NSW's global reputation as a tourism and major events destination by delivering compelling cultural, sporting, entertainment and lifestyle experiences that encourage repeat visitation.

### Balancing year-round visitation

Seasonal events – from winter festivals to summer celebrations – in addition to annual marquee events such as Vivid Sydney, the New Year's Test Match, Sydney Marathon and State of Origin, mitigate fluctuations in visitation across the year and provide continuous economic, social and cultural benefits. A year-round events calendar supports local businesses and strengthens the resilience of the visitor economy.

### Unlocking regional potential

Regional events drive economic growth by attracting visitors to experience the unique culture and heritage of towns and communities. Festivals, sporting and cultural events promote regional dispersal and foster local pride, contributing to sustainable growth across the state.

## A unified approach

Success in the global events sector requires a cohesive, statewide approach. By addressing challenges like rising costs, regulatory complexity and infrastructure gaps, along with a focus on ensuring event investment considers economic as well as social and cultural benefits, the NSW Government will reinforce its thriving events landscape.

## OUR ACTIONS

24. **Deliver a year-round events calendar:** Curate a statewide calendar of events to boost visitation year-round, by continuing to attract world class and well-suited international events and identifying and leveraging growth opportunities from new aviation services in Sydney and Newcastle.
25. **Refresh event assessment and investment processes:** Ensure event investment attracts visitors and delivers economic benefits to Sydney and NSW.
26. **Strengthen event promotion and visitor engagement:** Leverage events, including as part of marketing campaigns, to increase destination and event awareness, drive visitation and ensure strong visitor engagement.







📍 Australian Tourism Exchange, Sydney



📍 Savvy Fitness, North Wollongong



📍 Australian Tourism Exchange, Sydney



📍 Carmen, Opera on the Harbour

## BUSINESS EVENTS: DRIVING INNOVATION AND OPPORTUNITY

NSW is positioned to dominate Australia's business events sector, securing high-value conferences, exhibitions and corporate incentives. Through investment in world-class venues, regional promotion and a commitment to sustainability and innovation, the NSW Government is positioning the state as a global business events hub. This will drive economic growth, support regional development and foster knowledge sharing across key sectors.

Business events enhance the knowledge economy by attracting global experts, driving innovation and promoting opportunities for delegates to extend their stays for leisure, further boosting the visitor economy.

### Positioning NSW as a global leader

Hosting major international business events positions NSW as a leader in high-growth sectors such as fintech, agtech, healthcare, education and advanced manufacturing. These events elevate Sydney and NSW's global profile while positioning the state as a hub for collaboration and innovation.

## Building infrastructure for growth

The opening of Western Sydney International Airport in 2026 will redefine NSW's business events landscape, creating a new opportunity for conferences and exhibitions. Regional infrastructure upgrades will extend the economic and social benefits of business events, promoting visitation and strengthening communities beyond metropolitan areas.

### OUR ACTIONS

27. **Reinforce partnerships:** In partnership with Business Events Sydney, refresh the business event strategy to ensure that key sectors are identified and prioritised.
28. **Promote a focus on Western Sydney and regional NSW:** Encourage Business Events Sydney to look for opportunities in Western Sydney and continue to promote business event opportunities in regional NSW.
29. **Prioritise opportunities for existing and new infrastructure in key destinations:** Investigate the supply of business event venues and infrastructure in Western Sydney and other key locations outside of Sydney, such as Newcastle and Wollongong, and identify infrastructure needs to meet potential future demand.





📍 Stockton Sand Dunes, Port Stephens

## STRATEGIC PILLAR FOUR: FOCUS ON EXPERIENCES

**Objective:** Position NSW as a global leader, attracting high-value travellers and driving repeat visitation through the growth and development of immersive, authentic travel and a strong events calendar.

### UNLOCKING GROWTH THROUGH EXPERIENCES

Global tourism is shifting toward deeper, more meaningful experiences, where visitors seek genuine connections with destinations. Using Sydney and NSW's icons and inherent strengths, like its incredible coastline and quality food and wine as a catalyst, NSW is well-positioned to lead this evolution, offering immersive experiences that resonate with today's travellers.

For visitors to NSW, this could mean:

- Exploring national parks and culturally significant sites with Aboriginal guides, learning ancient traditions.

- Savouring farm-to-table dining, connecting with local producers.
- Discovering hidden coastal treasures and untouched landscapes.
- Immersing in sporting and cultural events and festivals in vibrant metropolitan and regional settings.

Visitor economy businesses across the state should continue to be supported to develop high-quality, competitive tourism offerings. By building industry capability, a more diverse and experience-rich visitor economy will grow.



📍 Thredbo, Snowy Mountains

### A WELCOMING NSW: OPEN TO ALL, ACCESSIBLE FOR ALL

NSW is a place where everyone – regardless of ability, identity, or background – should feel welcome. By embedding inclusion, accessibility and cultural diversity across the visitor economy, we will strengthen social cohesion and unlock new opportunities for growth.

With rising demand for accessible and LGBTQIA+ tourism, NSW is uniquely positioned to lead in inclusive travel. By fostering universal access, multicultural representation and welcoming experiences, NSW endeavours to ensure that every visitor feels a sense of belonging and is inspired to return.

With a focus on the known experience drivers, NSW will capitalise on its inherent strengths and prioritise a range of key experience categories.

## LEVERAGING NSW'S STRENGTHS

- Nature: Highlighting coastal treasures – Bondi Beach through to our national parks and regenerative travel opportunities.
- Culinary: Featuring world-class dining, immersive farm-to-table opportunities, wine trails and local produce experiences.
- Agritourism: Connecting visitors with rural life through hands-on farm experiences, produce tastings and seasonal events.
- Culture: Showcasing Aboriginal experiences, artistic vibrancy, multicultural heritage and significant historical sites.

- Journeys: Celebrating iconic road trips and experience-led travel routes, including cruising.
- Wellness: Promoting rejuvenation through natural retreats, spas and serene environments.

By championing these experience opportunities, NSW will differentiate itself globally, attract high-value travellers and drive growth across both regional and metropolitan visitor economies.







📍 Chiswick Restaurant, Woollahra

## NATURE-BASED TOURISM

Anchored by Sydney's iconic harbour and beaches, NSW has more than 870 national parks and marine reserves, more than 2,000km of coastline and an intricate network of rivers and lakes. From camping and bushwalking, to surfing world-class beaches and snorkelling marine reserves, these experiences attract high-value visitors, support regional businesses and economies and strengthen NSW's position as a leader in nature-based tourism.

Targeted investment in infrastructure, marketing and visitor experiences will ensure nature-based tourism continues to drive economic growth year-round.

### First-light tourism

Sunrise reveals NSW at its most tranquil and transformative, offering visitors a unique way to connect with the state's landscapes and culture. From ocean sunrises and misty mountain peaks to rolling rural vistas, first-light tourism blends nature, wellness and Aboriginal storytelling into immersive, high-value experiences.

### Sustainability

NSW is a leader in biodiversity conservation and sustainable tourism. Eco-certification programs, habitat restoration initiatives and renewable energy-powered infrastructure are reinforcing the state's ability to attract high-value, eco-conscious visitors.

## CULINARY TOURISM

NSW's diverse food culture, fresh local produce and world-class dining create exceptional culinary experiences.

Food and drink connect visitors with landscapes, heritage and local communities. Visitors can explore farm-to-table dining, cellar doors, distilleries, breweries and artisanal markets; enjoy diverse food precincts, events, night markets and international cuisines; and discover native ingredients through tasting tours and cooking classes.

## AGRITOURISM

Agritourism immerses visitors in NSW's diverse rural landscapes, offering hands-on farm experiences, artisanal food trails and seasonal harvests. As one of the most seasonally diverse agricultural regions in Australia, NSW provides visitors with year-round opportunities to connect with food, producers and rural communities. Farm-gate trails, local markets and eco-tourism experiences support producers while attracting high-value visitors to rural communities.



📍 Sydney Oyster Farm Tours, Mooney Mooney





📍 Sea Cliff Bridge, Clifton

## CULTURE

NSW's arts and cultural experiences, including Aboriginal experiences, offer a dynamic fusion of history and heritage, creativity and storytelling. From world-class festivals and live performances to state-owned cultural institutions, local galleries and vibrant precincts, these experiences strengthen NSW's identity, foster community pride and drive economic growth.

### History and heritage

NSW's history is woven into its landscapes, towns and communities. From ancient Aboriginal traditions to colonial and industrial heritage, the state offers rich, immersive experiences that connect visitors with the past.



📍 Stockton Sand Dunes, Port Stephens

### Aboriginal tourism

Aboriginal tourism offers a profound connection to the world's oldest continuous culture, enriching NSW's visitor experience through storytelling, traditional practices and immersive exchanges. By sharing their deep relationships with land, waters and skies, Aboriginal communities bring an unmatched cultural depth to NSW, inviting visitors to engage with living history.

Storytelling is central to Aboriginal culture as a means of passing down knowledge through generations. Visitors can engage with Dreamtime narratives, guided cultural walks, art workshops and performances that bring these stories to life. Dawn experiences, including sunrise tours and Smoking Ceremonies, provide a deeper understanding of Aboriginal perspectives on renewal and connection to Country.

## JOURNEYS

### Road trips

Road trips are a key driver of NSW's visitor economy, offering flexible, immersive and sustainable travel experiences. The NSW Government is investing in scenic driving routes, upgraded rest stops and enhanced wayfinding to encourage longer stays and increased regional spending. The caravan and camping sector plays a vital role in this network. Investing in modern facilities, eco-friendly campgrounds and improved connectivity will enhance the experience for road trippers and camping enthusiasts alike.

### Powering the future with electric vehicles (EVs)

With EV adoption accelerating, the NSW Government is expanding its EV charging network, ensuring ultra-fast chargers every 100km along major routes and at key road trip destinations, including caravan parks and eco-campsites. This commitment aligns with NSW's net-zero goals and strengthens its position as a leading destination for sustainable road travel.



📍 Glenworth Valley

### Cruise

The cruise sector is an important element of NSW's visitor economy, supporting jobs, regional dispersal and local businesses. Expanding cruise tourism beyond Sydney to regional ports creates new economic opportunities while enhancing passenger experiences. These efforts will broaden economic benefits, support local businesses and ensure more passengers experience NSW's diverse landscapes, heritage and culture.





📍 Koonyum Range Retreat, Mullumbimby

## WELLNESS TOURISM

NSW is set to lead the future of wellness tourism in Australia, offering diverse landscapes, deep cultural connections and sustainable experiences that promote relaxation, renewal and reconnection with nature.

By fostering strategic partnerships, sustainable investment and innovative experiences, NSW can cement its reputation as a premier wellness destination, driving both regional and metropolitan visitor economy growth.

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### OUR ACTIONS

- 30. **Support for experience development:** Support tourism operators across Sydney and regional NSW to develop, promote and sell their experiences.
  - 31. **Partnerships across government:** Work across NSW Government to identify opportunities for experience development and assets in all priority categories.
  - 32. **Clear points of support:** Review available funding and support, including for Aboriginal businesses, to underpin experience development; ensure it is appropriately targeted and prioritised; and investigate additional experience development funding where needed.
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📍 Sierra Escape, Piambong

# STRATEGIC PILLAR FIVE: LEVERAGE DATA AND INSIGHTS

Objective: Build a data-driven, insight-led visitor economy that enables agile decision-making, delivers enhanced experiences and fosters growth.

## EMPOWERING NSW'S VISITOR ECONOMY WITH HIGH-QUALITY DATA

Destination NSW is leading the development of a statewide data platform that will transform how stakeholders access and use visitor data and insights. While traditional data sources remain valuable, they often lack the immediacy and precision needed for agile decision-making.

This platform will integrate multiple data sources as far as possible to provide a comprehensive view of visitor behaviour. Depending on availability, this may include:

- **Visitation data:** From Commonwealth and State Government agencies.
- **Visitor spending data:** Identifying visitor spending patterns to highlight key economic drivers.
- **Telecommunications data:** Analysing visitor movements, hotspots and regional dispersal trends.
- **Visitor feedback:** Gathering insights from visitor reviews, surveys and sentiment analysis.
- **Cultural and night-time economy data:** Incorporating information from cultural institutions and initiatives like the 24-Hour Economy Commissioner's Data After Dark.



- **Booking, aviation and accommodation data:** Supply-side data across state infrastructure.
- **Brand Engagement Monitor:** Analysis of consumer intention and consideration to visit NSW.
- **Consumer insights:** Gathering insights from Destination NSW channels to understand consumer search behaviour.
- **Ad hoc data:** Sourced periodically to augment and refine the platform's insights over time.

This dynamic approach will provide actionable insights that will assist to improve visitor experiences, guide investment and enable NSW to meet modern traveller expectations.

### Driving growth and equity through data

Making data accessible across NSW will empower stakeholders to make informed decisions that drive growth. Ensuring equitable access will unlock opportunities for both metropolitan and regional areas, fostering economic resilience and supporting sustainable, inclusive growth.

### Accessible, collaborative and cost-effective solutions

Destination NSW will collaborate with various NSW Government and Federal Government stakeholders,

relevant third parties and commercial data providers to deliver a simple platform that consolidates fragmented systems into one cohesive solution where possible.

This platform will:

- Provide Destination Networks, regional tourism organisations, visitor economy businesses and local governments with data to drive insights.
- Broaden data access while reducing costs through a collaborative model.
- Encourage innovation and strengthen partnerships across the visitor economy.

This unified approach will create a responsive, future-ready visitor economy that meets the needs of stakeholders statewide.

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### OUR ACTIONS

33. **Develop a statewide visitor data platform:** Create an integrated system to provide a wide range of data via Destination NSW's corporate channels, including its website, equipping stakeholders with cost-effective tools to enhance planning and decision making.
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# REDEFINING SUCCESS MEASURES

The NSW Government will transform how success in the visitor economy is measured. A new framework will reinforce the primacy of the economic contribution of the visitor economy, and give consideration to its important social, environmental and cultural role.

## Economic impact

Indicators will highlight key indicators of economic activity, including number of jobs supported and local business support. This data will demonstrate the sector's critical role in building shared prosperity across NSW and the willingness of NSW communities to embrace visitation into their regions and towns.

## Cultural preservation

New metrics will assess how the visitor economy embraces our Aboriginal heritage, ensuring the preservation of traditional knowledge, supporting local artisans and integrating cultural elements into authentic visitor experiences. These measures will celebrate and sustain NSW's rich cultural heritage.

## Environmental sustainability

Sustainability measures will track progress in reducing emissions, minimising waste and adopting eco-friendly

practices. These metrics will reflect NSW's commitment to achieving net-zero by 2050 and advancing responsible tourism.

## A balanced approach to success

This framework, along with supply-side information, will provide a comprehensive, holistic view of NSW's visitor economy, aligning with stakeholder priorities, community values and environmental goals. By redefining success, the NSW Government is reinforcing its commitment to long-term sustainability, inclusivity and shared prosperity across the state.

## OUR ACTIONS

34. **A new approach to measuring success:** Create unified metrics and tools to reinforce the primacy of the economic contribution of the visitor economy, along with social, cultural and environmental impacts and benefits.



# REVIEW AND REPORTING

To ensure the NSW Visitor Economy Strategy 2035 remains relevant and effective, a robust framework for review and reporting will guide its implementation.

Destination NSW, in collaboration with key government agencies, will oversee the review and reporting framework, ensuring accountability.

Key elements of the review and reporting framework include:

- **Mid-Strategy review:** A comprehensive review will be conducted in 2030 to evaluate the Strategy's impact, recalibrate priorities, and incorporate emerging trends and opportunities.
- **Stakeholder engagement:** Regular feedback will be sought from industry, community and government

stakeholders to ensure the Strategy remains aligned with the evolving needs of the visitor economy. This will include regular engagement with local councils.

- **Data-driven insights:** Leveraging near-time data and analytics, Destination NSW will adapt initiatives as needed to respond to dynamic market conditions.

This process will ensure the Strategy stays flexible and responsive, identifying emerging opportunities and addressing challenges as they arise. Ongoing collaboration with stakeholders will be central to refining initiatives, ensuring that the voices of industry, communities and visitors continue to shape the direction of the Strategy.





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