

## Definition

Wine tourism to NSW is defined as visitors who have been to at least one winery in NSW (also referred to as **NSW wine travellers**).

## Overview

	Visitors to (million)	Nights in (million)	Total spend (\$ billion)	Spend per visitor (\$)	Spend per night (\$)
NSW	2.0	14.4	\$2.2	\$1,166	\$155

NSW received nearly 2.0 million international <sup>(1)</sup> and domestic <sup>(2)</sup> visitors who had been to at least one winery in the State. They spent nearly 14.4 million nights in the NSW - up by 4.0% on YE Dec 16.

Visitors who had been to at least one winery in NSW spent an estimated \$2.2 billion <sup>(3)</sup> (incl package expenditure by overseas visitors) in the State - up by 9.5% on YE Dec 16.

<sup>(1)</sup> Source: International Visitor Survey, YE Dec 17, Tourism Research Australia.

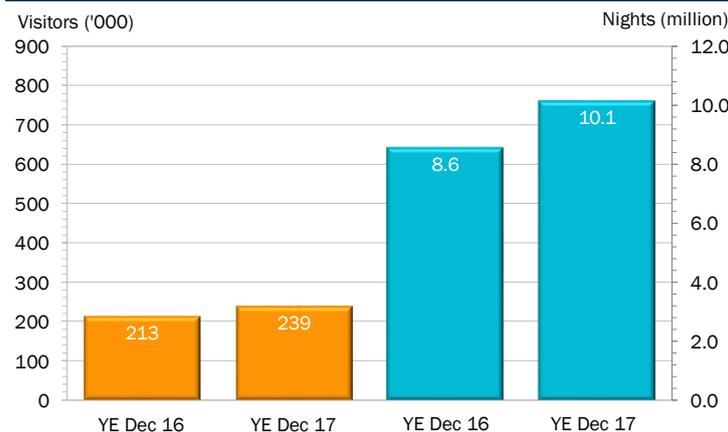
<sup>(2)</sup> Source: National Visitor Survey, YE Dec 17, Tourism Research Australia.

<sup>(3)</sup> Total expenditure on the trip.

## International Market<sup>1</sup>

The information in this section relates to international overnight visitors who have been to at least one winery in NSW.

### Visitors and nights in NSW



NSW received 238,700 international wine travellers - up by 12.1%\* on YE Dec 16. They spent over 10.1 million nights in the State - up by 18.5%\* on YE Dec 16.

### Expenditure (incl 30% prepaid package expenditure)

International wine travellers spent an estimated \$1.1 billion in the State (incl 30% of prepaid package expenditure) - up by 20.8%\* on YE Dec 16. On average, they spent \$4,763 per visitor and \$111 per night.

### Market share

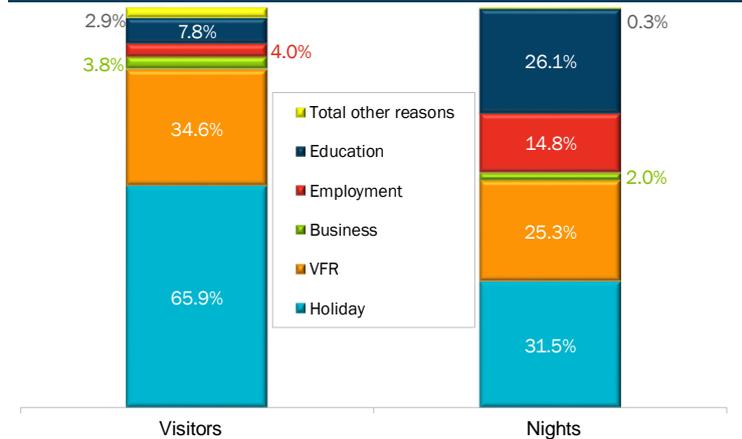
Wine travellers represented 5.7% of visitors and 10.7% of nights by all international travellers to the State. Compared with YE Dec 16, the share of visitors was up by 0.2% points and the share of nights was up by 1.0% point.

Spend by wine travellers represented 10.8% of expenditure by all international travellers to NSW. Compared with YE Dec 16, the share of expenditure was up by 1.0% point.

### First or return visitor

Nearly ½ (46.5%) of international NSW wine travellers were on a return visit to Australia. This was a lower percentage than for all visitors to the State (50.3%).

## Purpose of visit to NSW



'Holiday' (65.9%) was the largest purpose of visit to the State for international wine travellers. 'Visiting friends and relatives (VFR)' (34.6%) was the 2<sup>nd</sup> largest, followed by 'education' (7.8%).

'Holiday' (31.5%) was the largest purpose of visit in terms of nights in the State by international wine travellers. 'Education' (26.1%) was the 2<sup>nd</sup> largest, followed by 'VFR' (25.3%).

### Average length of stay in NSW

International wine travellers stayed an average of 42.5 nights in the State. This was substantially longer than the average for all international visitors in NSW (22.7 nights).

French wine travellers (78.1 nights) had the longest average stay in the State, followed by wine travellers from Mainland China (69.1 nights) and Japanese wine travellers (62.4 nights).

### Median stay in NSW

International wine travellers had a median stay of 10 nights in the State. This was substantially longer than the median stay for all international visitors in NSW (5 nights).

Wine travellers from Philippines (54 nights) had the longest median stay in the State, followed by Irish wine travellers (34 nights) and wine travellers from Mainland China (33 nights).

### Origin

Rank	Origin market	Visitors		Nights		Average stay (nights)
		('000)	%	('000)	%	
1	South Korea	46	19.3%	1,013	10.0%	21.9
2	Mainland China	36	15.0%	2,474	24.4%	69.1
3	United Kingdom	30	12.4%	1,304	12.9%	44.1
4	USA	27	11.4%	719	7.1%	26.5
5	Canada	9	3.9%	344	3.4%	37.2
	Other Asia (1)	49	20.4%	2,417	23.8%	49.7
	Other Europe (2)	30	12.5%	1,428	14.1%	48.0
	Other Countries	12	5.2%	441	4.3%	35.6
	Total NSW	239		10,140		42.5

np = estimate considered statistically unreliable

South Korea (19.3%) was the largest source market of international NSW wine travellers. Mainland China (15.0%) was the 2<sup>nd</sup> largest, followed by the United Kingdom (12.4%).

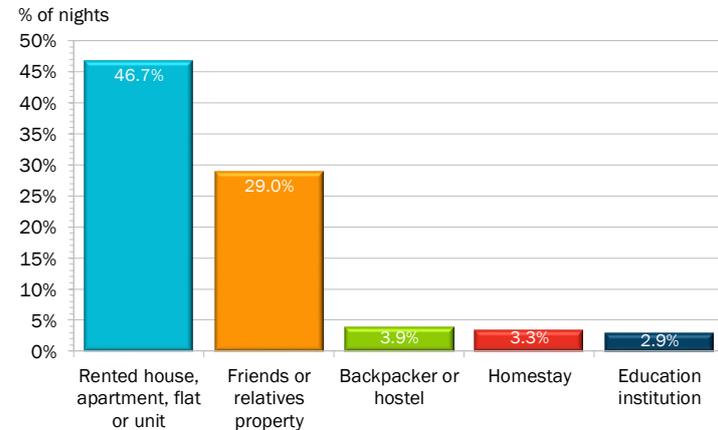
Mainland China (24.4%) contributed more nights in the State than any other source market of international wine travellers. The United Kingdom (12.9%) was the 2<sup>nd</sup> largest, followed by South Korea (10.0%).

<sup>(1)</sup> All Asian markets, excluding Mainland China and South Korea

<sup>(2)</sup> All European markets, excluding the United Kingdom

## International Market continued

### Accommodation used in NSW



'Rented house, apartment, flat or unit' (46.7%) was the most popular accommodation type used for nights in the State by international wine travellers. 'Friends or relatives property' (29.0%) was the 2<sup>nd</sup> most popular accommodation type, followed by 'backpacker or hostel' (3.9%).

### Seasonality

Over 3/10 (31.2%) of international NSW wine travellers departed Australia in the December quarter. Over 3/10 (30.2%) of nights by international wine travellers were spent by those who departed Australia in the March quarter.

### Wine regions visited in NSW

'Hunter Valley' was by far the most visited wine region in NSW by international wine travellers. Nearly 2/3 (65.7%) had been to a winery in the region. International wine travellers spent almost 4/5 (79.5%) of their nights in 'Hunter Valley'.

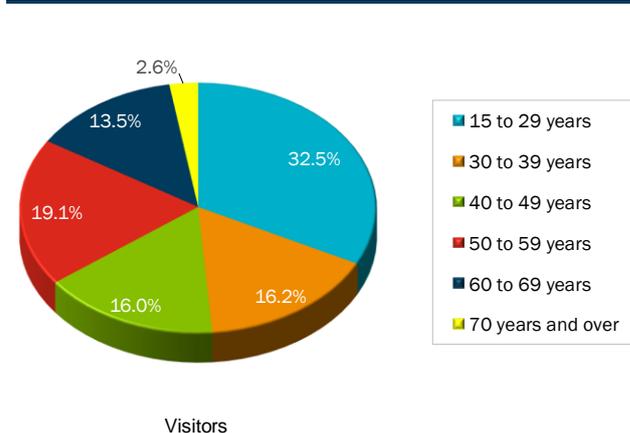
### Travel party

Nearly 1/2 (45.3%) of international NSW wine travellers arrived in Australia 'alone'. Their 2<sup>nd</sup> most common travel party description was 'adult couple' (23.2%), followed by 'family group' (14.5%).

### Gender

A larger proportion of international NSW wine travellers were female (59.6%) than male (40.4%).

### Age groups



'15 to 29 years' (32.5%) was the biggest age group of international NSW wine travellers. '50 to 59 years' (19.1%) was the 2<sup>nd</sup> biggest, followed by '30 to 39 years' (16.2%).

## Top places visited in NSW

Visitors			Nights		
Region	('000)	%	Region	('000)	%
Sydney	217	91.5%	Sydney	8,244	81.3%
The Hunter	52	21.8%	The Hunter	834	8.2%
North Coast NSW	30	12.5%	North Coast NSW	337	3.3%
South Coast NSW	15	6.4%	np	np	np
Blue Mountains	15	6.3%	np	np	np

np = estimate considered statistically unreliable

'Sydney' (91.5%) was by far the most visited region in NSW by international wine travellers. 'The Hunter' (21.8%) was the 2<sup>nd</sup> most visited, followed by 'North Coast NSW' (12.5%).

International wine travellers spent more nights in 'Sydney' (81.3%) than any other region in the State. 'The Hunter' (8.2%) had the 2<sup>nd</sup> most nights, followed by 'North Coast NSW' (3.3%).

### Transport in NSW

'Private vehicle or company car' (33.4%) was the most common transport used in the State by international wine travellers. 'Aircraft' (29.4%) was the 2<sup>nd</sup> most common, followed by 'local public transport' (17.8%).

### Travel package

Almost 1/5 (19.5%) of international NSW wine travellers arrived in Australia on a travel package. This was a higher percentage than for all visitors to the State (18.5%).

'Most ground transport within Australia' (84.2%) was the most popular travel arrangement included in the package by international NSW wine travellers (other than 'international airfares'), followed by 'all accommodation' (83.3%).

### Group tours

The rate of group tour travel to Australia amongst international NSW wine travellers was 15.0%. This was a higher percentage than for all visitors to the State (12.2%).

### Amount spent at wineries

Almost 1/3 (33.1%) of international NSW wine travellers bought wine to take away from the winery. Of those who bought wine, '\$51 to \$100' (28.4%) was the most common expenditure range, followed by '\$101 to \$500' (15.5%).

Almost 1/5 (19.5%) spent more than \$100 at the wineries.

### Activity at wineries

Activity at winery	Visitors to NSW	
	('000)	%
Wine tasting	207	86.8%
Purchase wine to take home	79	33.1%
Eat at a winery café or restaurant	60	25.1%
Purchase food at winery	23	9.8%
Winery tour	16	6.7%
Sample food at the winery	11	4.7%
Attend a public event, concert or festivals	3	1.4%
Attend a private function	np	np
Other	np	np
Cooking class	np	np

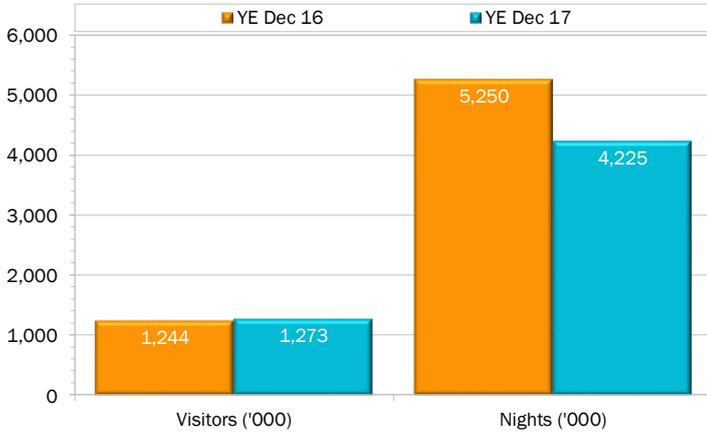
np = estimate considered statistically unreliable

'Wine tasting' (86.8%) was by far the most popular activity undertaken at a winery by international NSW wine travellers. 'Purchase wine to take home' (33.1%) was the 2<sup>nd</sup> most popular, followed by 'eat at a winery café or restaurant' (25.1%) and 'purchase food at winery' (9.8%).

## Domestic Market<sup>1</sup>

The information in this section relates to domestic visitors who have been to at least one winery in NSW. Domestic overnight visitors and domestic daytrips are shown separately.

### Visitors and nights in NSW



NSW received nearly 1.3 million domestic overnight wine travellers - up by 2.3% on YE Dec 16. They spent over 4.2 million nights in the State.

### Expenditure (incl airfares and transport costs)

Domestic overnight wine travellers spent an estimated \$1.0 billion in the State - up by 6.2% on YE Dec 16. On average, they spent \$834 per visitor and \$240 per night.

### Market share

Wine travellers represented 4.0% of visitors and 4.2% of nights by all domestic overnight travellers to the State. Compared with YE Dec 16, the share of visitors was down by 0.2% points and the share of nights was down by 1.3% points.

Spend by wine travellers represented 5.4% of expenditure by all domestic overnight travellers to NSW. Compared with YE Dec 16, the share of expenditure was down by 0.3% points.

### Purpose of visit to NSW



'Holiday' (67.9%) was the largest purpose of visit to the State for domestic overnight wine travellers. 'Visiting friends and relatives (VFR)' (26.0%) was the 2<sup>nd</sup> largest, followed by 'business' (6.4%).

'Holiday' (62.1%) was the largest purpose of visit in terms of nights in the State by domestic wine travellers. 'VFR' (26.2%) was the 2<sup>nd</sup> largest, followed by 'business' (7.5%).

## Origin

Origin market	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
Regional NSW	333	26.1%	1,098	26.0%	3.3
Sydney	711	55.8%	1,881	44.5%	2.6
Intrastate	1,043	82.0%	2,979	70.5%	2.9
Victoria	100	7.9%	567	13.4%	5.7
Queensland	83	6.5%	np	np	np
ACT	np	np	np	np	np
Other interstate	np	np	np	np	np
Interstate	230	18.0%	1,247	29.5%	5.4
Total NSW	1,273		4,225		3.3

np = estimate considered statistically unreliable

Sydney (55.8%) was the largest source market of domestic overnight wine travellers to NSW. Regional NSW (26.1%) was the 2<sup>nd</sup> largest, followed by Victoria (7.9%).

Sydney (44.5%) contributed more nights in the State than any other source market of domestic wine travellers. Regional NSW (26.0%) was the 2<sup>nd</sup> largest, followed by Victoria (13.4%).

### Average length of stay in NSW

Domestic wine travellers stayed an average of 3.3 nights in the State. This was longer than the average for all domestic visitors in NSW (3.2 nights).

Victorian wine travellers (5.7 nights) had the longest average stay in the State, followed by wine travellers from regional NSW (3.3 nights) and Sydney wine travellers (2.6 nights).

### Seasonality

More domestic overnight wine travellers returned home from their visit to NSW in April (10.9%) than any other month. Nearly 1/5 (15.1%) of nights in the State by domestic wine travellers were spent by those who returned home from the trip in January.

### Transport in NSW

'Private vehicle or company car' (89.3%) was the most common transport used in the State by domestic overnight wine travellers. 'Aircraft' (6.7%) was the 2<sup>nd</sup> most common, followed by 'rental car' (2.2%).

### Accommodation used in NSW



'Friends or relatives property' (24.7%) was the most popular accommodation type used for nights in the State by domestic wine travellers. 'Standard hotel or motor inn, below 4 star' (19.0%) was the 2<sup>nd</sup> most popular accommodation type, followed by 'luxury hotel or resort, 4 or 5 star' (14.5%).

# Wine Tourism to NSW

Year ended December 2017

For the period of January 2017 to December 2017

Sources: (1) NVS & (2) IVS, YE Dec 17, TRA - unless otherwise specified.



## Domestic Market continued

### Top places visited in NSW

Region	Visitors		Region	Nights	
	('000)	%		('000)	%
The Hunter	569	46.7%	The Hunter	1,314	31.1%
Central NSW	269	22.1%	Central NSW	924	21.9%
South Coast NSW	124	10.2%	South Coast NSW	491	11.6%
North Coast NSW	101	8.3%	North Coast NSW	422	10.0%
Capital Country	90	7.4%	np	np	np

np = estimate considered statistically unreliable

'The Hunter' (46.7%) was by far the most visited region in NSW by domestic overnight wine **travellers**. 'Central NSW' (22.1%) was the 2<sup>nd</sup> most visited, followed by 'South Coast NSW' (10.2%).

Domestic wine travellers spent more **nights** in 'The Hunter' (31.1%) than any other region in the State. 'Central NSW' (21.9%) had the 2<sup>nd</sup> most nights, followed by 'South Coast NSW' (11.6%).

### Activities in NSW

'Eat out, dine at a restaurant or cafe' (83.6%) was the most popular activity undertaken by domestic overnight wine travellers in NSW. 'Visit wineries' (76.2%) was the 2<sup>nd</sup> most popular activity, followed by 'sightseeing or looking around' (37.5%).

### Travel party

'Adult couple' (38.0%) was the most common travel party amongst domestic overnight wine travellers to NSW. 'Friends and relatives' (33.4%) was the 2<sup>nd</sup> most common, followed by 'family group' (14.1%).

### Gender

A larger proportion of domestic overnight wine travellers were female (52.4%) than male (47.6%).

### Age groups

'50 to 59 years' (22.6%) was the biggest age group of domestic overnight wine travellers. '40 to 49 years' (17.9%) was the 2<sup>nd</sup> biggest, followed by '30 to 39 years' (17.3%).

### Lifecycle groups

'Parent with youngest child aged under 15' (23.0%) was the most common lifecycle grouping amongst domestic overnight wine travellers to NSW. 'Older working' (21.2%) was the 2<sup>nd</sup> most common, followed by 'older non-working' (18.5%).

### Wine regions visited in NSW

Wine region	Visitors		Wine region	Nights	
	('000)	%		('000)	%
Hunter Valley	599	47.1%	Hunter Valley	1,721	40.7%
Mudgee	127	10.0%	Mudgee	528	12.5%
Orange	110	8.6%	Orange	442	10.5%
Southern Highlands	74	5.8%	Shoalhaven	np	np
Shoalhaven	63	4.9%	Southern Highlands	np	np
Riverina	np	np	Snowy Mountains	np	np
Snowy Mountains	np	np	Riverina	np	np
Other NSW	261	20.5%	Other NSW	958	22.7%

np = estimate considered statistically unreliable

'Hunter Valley' (46.7%) was by far the most visited wine region in NSW by domestic overnight wine **travellers**. 'Mudgee' (10.0%) was the 2<sup>nd</sup> most visited, followed by 'Orange' (8.6%).

Domestic wine travellers spent more **nights** in 'Hunter Valley' (40.7%) than any other wine region in the State. 'Mudgee' (12.5%) had the 2<sup>nd</sup> most nights, followed by 'Orange' (10.5%).

## Activity at wineries

Activity at winery	Visitors to NSW	
	('000)	%
Wine tasting	899	70.6%
Purchase wine to take home	787	61.9%
Eat at a winery café or restaurant	594	46.7%
Purchase food at winery	428	33.6%
Attend a public event, concert or festivals	142	11.1%
Sample food at the winery	74	5.8%
Winery tour	np	np
Attend a private function	np	np
Cooking class	np	np
Wine making class	np	np

np = estimate considered statistically unreliable

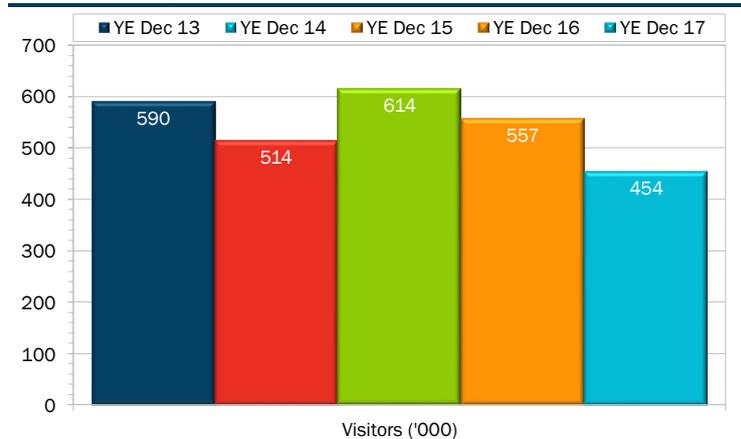
'Wine tasting' (70.6%) was by far the most popular activity undertaken at a NSW winery by domestic overnight wine travellers. 'Purchase wine to take home' (61.9%) was the 2<sup>nd</sup> most popular, followed by 'ate at a winery café or restaurant' (46.7%) and 'purchase food at winery' (33.6%).

### Amount spent at wineries

Over 3/5 (61.9%) of domestic overnight wine travellers to NSW bought wine to take away from the winery. Of those who bought wine, '\$101 to \$500' (40.1%) was the most common expenditure range, followed by '\$51 to \$100' (26.8%).

Nearly 1/2 (48.5%) spent more than \$100 at the wineries.

### Domestic daytrips to NSW



NSW received 454,000 domestic daytrip wine visitors - down by 18.4% on YE Dec 16.

### Expenditure (incl airfares and transport costs)

Domestic daytrip wine travellers spent an estimated 81 million in the State - down by 42.7%\* on YE Dec 16. On average, they spent \$178 per visit.

### Market share

Wine travellers represented 0.8% of all domestic daytrip visitors to the State. Compared with YE Dec 16, the share was down by 0.2% points.

Spend by wine travellers represented 1.3% of expenditure by all domestic daytrip travellers to NSW. Compared with YE Dec 16, the share of expenditure was down by 1.0% point.

### Further information

Please see [www.destinationnsw.com.au](http://www.destinationnsw.com.au) for profiles on travel to each region in NSW and information on international and domestic travel to the State.

Please note: The information in this report is sourced from a sample survey, hence the results are subject to sampling variability.

\* The percentage change is statistically significant.

np = Not published due to insufficient sample.