

Definition

Food tourism to NSW is defined as visitors who have had a food experience in NSW (also referred to as **NSW food travellers**).

Overview

	Visitors to (million)	Nights in (million)	Total spend (\$ billion)	Spend per visitor (\$)	Spend per night (\$)
Australia	16.3	209.4	\$33.0	\$2,021	\$157
NSW	4.9	56.0	\$8.6	\$1,794	\$154

There were over 16.3 million international ⁽¹⁾ and domestic ⁽²⁾ overnight visitors who have had a food experience on their trip – down by 0.2% on YE Dec 17. They spent over 209.4 million nights in Australia - down by 2.7% on YE Dec 17.

Visitors who have had a food experience on their trip spent an estimated \$33.0 billion ⁽³⁾ (incl package expenditure by overseas visitors) in Australia - up by 9.8% on YE Dec 17.

NSW received nearly 4.9 million food travellers who stayed for almost 56.0 million nights in the State – down by 2.2% and 5.5% respectively on YE Dec 17. Food travellers spent an estimated \$8.6 billion in the State - up by 1.9% on YE Dec 17.

⁽¹⁾ Source: International Visitor Survey, YE Dec 18, Tourism Research Australia.

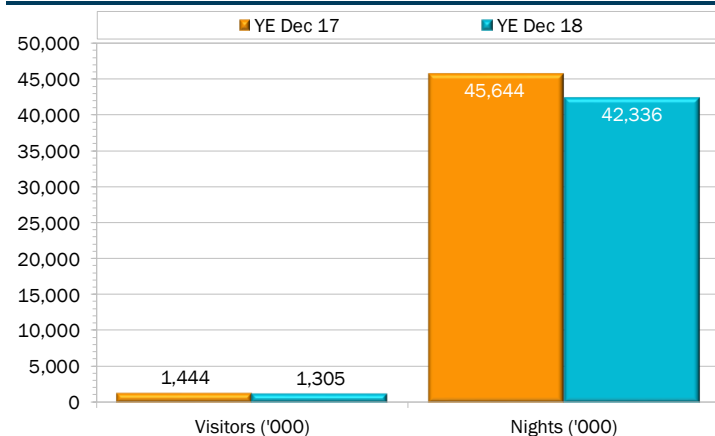
⁽²⁾ Source: National Visitor Survey, YE Dec 18, Tourism Research Australia.

⁽³⁾ Total expenditure on the trip.

International Market¹

The information in this section relates to international overnight visitors who have had a food experience in NSW.

Visitors and nights in NSW



NSW received over 1.3 million international food travellers – down by 9.6%* on YE Dec 17. They spent over 42.3 million nights in the State – down by 7.2%* on YE Dec 17.

Expenditure (incl 30% prepaid package expenditure)

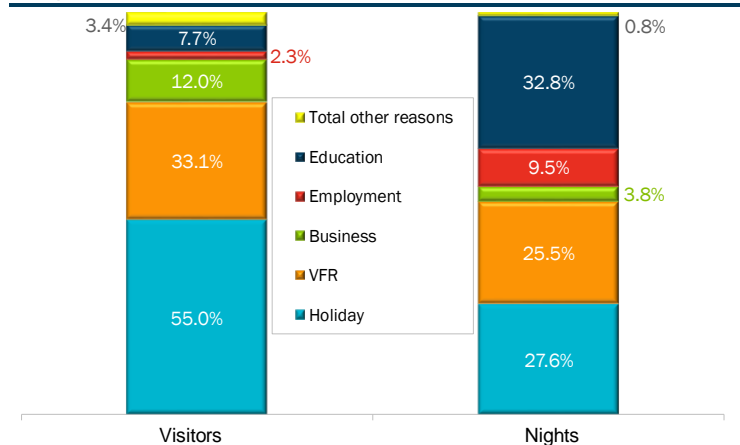
International food travellers spent an estimated \$5.1 billion in the State (incl 30% of prepaid package expenditure) – down by 4.8% on YE Dec 17. On average, they spent \$3,919 per visitor and \$120 per night.

Market share

Food travellers represented 29.9% of visitors and 44.0% of nights by all international travellers to NSW. The State received 37.7% of visitors and 28.9% of nights in Australia by international food travellers.

Spend by food travellers represented 47.4% of expenditure by all international travellers to NSW. The State received 30.0% of all expenditure by international food travellers to Australia.

Purpose of visit to NSW



'Holiday' (55.0%) was the largest purpose of visit to the State for international food **travellers**. 'Visiting friends and relatives (VFR)' (33.1%) was the 2nd largest, followed by 'business' (12.0%).

'Education' (32.8%) was the largest purpose of visit in terms of **nights** in the State by international food travellers. 'Holiday' (27.6%) was the 2nd largest, followed by 'VFR' (25.5%).

Average length of stay in NSW

International food travellers stayed an average of 32.4 nights in the State. This was substantially longer than the average for all international visitors in NSW (22 nights).

Indian food travellers (62.9 nights) had the longest average stay in the State, followed by food travellers from Thailand (53.5 nights) and South Korean food travellers (49.8 nights).

Median stay in NSW

International food travellers had a median stay of 7 nights in the State. This was longer than the median stay for all international visitors in NSW (5 nights).

Food travellers from India (27 nights) had the longest median stay in the State, followed by Irish food travellers (17 nights) and food travellers from Germany (14 nights).

Origin

Rank	Origin market	Visitors		Nights		Average stay (nights)
		('000)	%	('000)	%	
1	Mainland China	211	16.2%	8,345	19.7%	39.5
2	USA	167	12.8%	2,203	5.2%	13.2
3	New Zealand	114	8.8%	1,280	3.0%	11.2
4	United Kingdom	107	8.2%	2,887	6.8%	27.1
5	Japan	52	4.0%	1,902	4.5%	36.4
	Other Asia (1)	374	28.6%	14,761	34.9%	39.5
	Other Europe (2)	164	12.6%	5,841	13.8%	35.5
	Other Countries	116	8.9%	5,117	12.1%	44.1
	Total NSW	1,305		42,336		32.4

np = estimate considered statistically unreliable

Mainland China (16.2%) was the largest source market of international NSW food **travellers**. The USA (12.8%) was the 2nd largest, followed by New Zealand (8.8%).

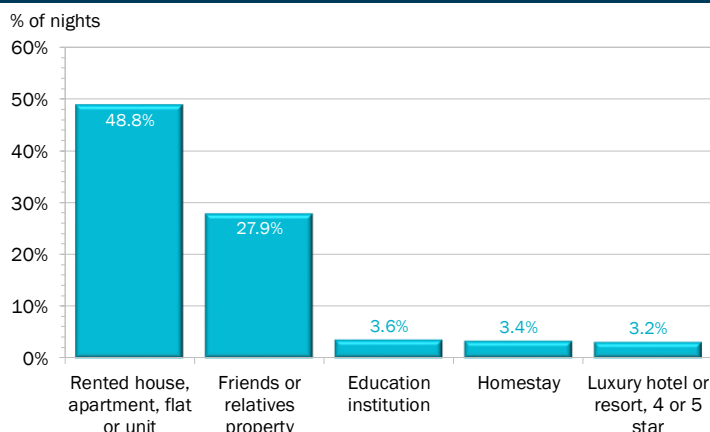
Mainland China (19.7%) contributed more **nights** in the State than any other source market of international food travellers. India (7.4%) was the 2nd largest, followed by the United Kingdom (6.8%).

(1) All Asian markets, excluding Mainland China and Japan

(2) All European markets, excluding the United Kingdom

International Market continued

Accommodation used in NSW



'Rented house, apartment, flat or unit' (48.8%) was the most popular accommodation type used for nights in the State by international food travellers. 'Friends or relatives property' (27.9%) was the 2nd most popular accommodation type, followed by 'educational institution' (3.6%).

Seasonality

Nearly 3/10 (28.4%) of international NSW food travellers departed Australia in the December quarter. Three tenth (30.0%) of nights by international food travellers were spent by those who departed Australia in the March quarter.

Travel party

Over 1/2 (52.5%) of international NSW food travellers arrived in Australia 'alone'. Their 2nd most common travel party description was 'adult couple' (20.9%), followed by 'family group' (11.6%).

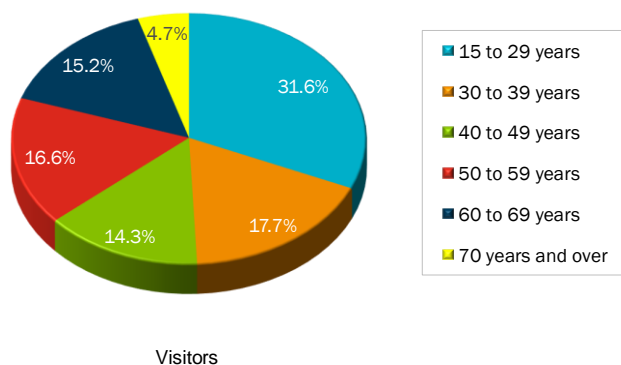
Lifecycle

'Young or midlife single' (34.8%) was the most common lifecycle grouping amongst international food travellers to NSW. 'Older working' (14.0%) was the 2nd most common, followed, by 'older non-working' (13.7%).

Gender

A larger proportion of international NSW food travellers were female (53.0%) than male (47.0%).

Age groups



'15 to 29 years' (31.6%) was the biggest age group of international NSW food travellers. '30 to 39 years' (17.7%) was the 2nd biggest, followed by '50 to 59 years' (16.6%).

Top places visited in NSW

Visitors			Nights		
Region	('000)	%	Region	('000)	%
Sydney	1,233	94.9%	Sydney	36,716	86.7%
North Coast NSW	89	6.9%	North Coast NSW	1,274	3.0%
South Coast NSW	69	5.3%	South Coast NSW	1,250	3.0%
The Hunter	67	5.2%	The Hunter	1,087	2.6%
Blue Mountains	37	2.8%	Central Coast	453	1.1%

np = estimate considered statistically unreliable

'Sydney' (94.9%) was by far the most visited region in the State by international food travellers. 'North Coast NSW' (6.9%) was the 2nd most visited, followed by 'South Coast NSW' (5.3%).

International food travellers spent more nights in 'Sydney' (86.7%) than any other region in the State. 'North Coast NSW' (3.0%) had the 2nd most nights, followed by 'South Coast NSW' (3.0%).

Transport in NSW

'Private vehicle or company car' (29.7%) was the most common transport used in the State by international food travellers, followed by 'aircraft' (27.2%) and 'local public transport' (22.0%).

First or return visitor

Nearly 3/5 (55.8%) of international NSW food travellers were on a return visit to Australia. This was a higher percentage than for all visitors to the State (52.8%).

Travel package

Over 1/8 (12.7%) of international NSW food travellers arrived in Australia on a travel package. This was a lower percentage than for all visitors to the State (16.2%). 'All accommodation' (85.6%) was the most popular travel arrangement included in the package by international NSW food travellers (other than 'international airfares').

Group tours

The rate of group tour travel to Australia amongst international NSW food travellers was 7.8%. This was a lower percentage than for all visitors to the State (10.4%).

Top activities in Australia

'Eat out, dine at a restaurant or cafe' (95.9%) was the most popular activity undertaken during the trip to Australia by international NSW food travellers. 'Go shopping for pleasure' (82.4%) was the 2nd most popular, followed by 'sightseeing or looking around' (81.3%).

Type of food experience in NSW

Food experience	Visitors to NSW		Visitors to Sydney		Visitors to regional NSW	
	('000)	%	('000)	%	('000)	%
Fine dining restaurants	730	56.2%	690	58.3%	75	47.1%
Local food markets	692	53.3%	634	53.6%	80	50.7%
Food festivals	148	11.4%	135	11.4%	22	14.1%
Farm tour	43	3.3%	30	2.5%	20	12.9%
Food tour	39	3.0%	24	2.1%	21	13.0%
Pick your own fruit	np	np	np	np	np	np
Cooking class	np	np	np	np	np	np

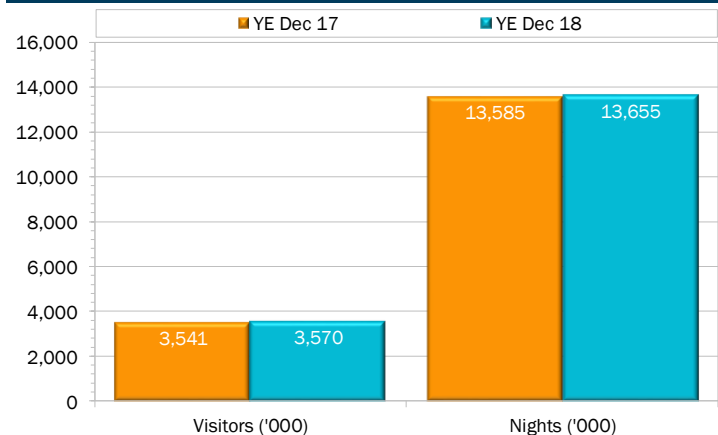
np = estimate considered statistically unreliable

'Fine dining restaurants' (56.2%) was the most popular food experience by international NSW food travellers. 'Fine dining restaurants' was also the most popular food experience in Sydney (58.3%), while 'local food markets' (50.7%) was the most popular in regional NSW.

Domestic Market¹

The information in this section relates to domestic overnight visitors who have had a food experience in NSW. Corresponding data for domestic daytrips is not available.

Visitors and nights in NSW



NSW received nearly 3.6 million domestic overnight food travellers - up by 0.8% on YE Dec 17. They spent nearly 13.7 million nights in the State - up by 0.5% on YE Dec 17.

Expenditure (incl airfares and transport costs)

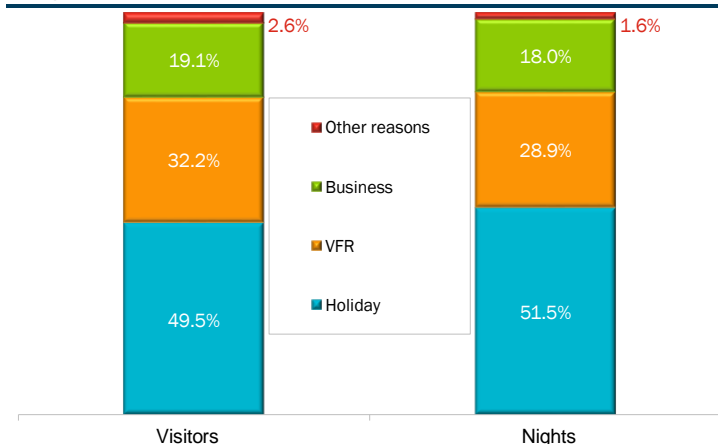
Domestic overnight food travellers spent an estimated \$3.5 billion in the State - up by 13.4%* on YE Dec 17. On average, they spent \$1,005 per visitor and \$258 per night.

Market share

Food travellers represented 10.3% of visitors and 12.7% of nights by all domestic overnight travellers to NSW. The State received 27.8% of visitors and 21.7% of nights by all domestic overnight food travellers.

Spend by food travellers represented 16.7% of expenditure by all domestic overnight travellers to NSW. The State received 22.1% of all expenditure by all domestic overnight food travellers.

Purpose of visit to NSW



'Holiday' (49.5%) was the largest purpose of visit to the State for domestic overnight food travellers. 'Visiting friends and relatives (VFR)' (32.2%) was the 2nd largest, followed by 'business' (19.1%).

'Holiday' (51.5%) was the largest purpose of visit in terms of nights in the State by domestic food travellers. 'VFR' (28.9%) was the 2nd largest, followed by 'business' (18.0%).

Origin

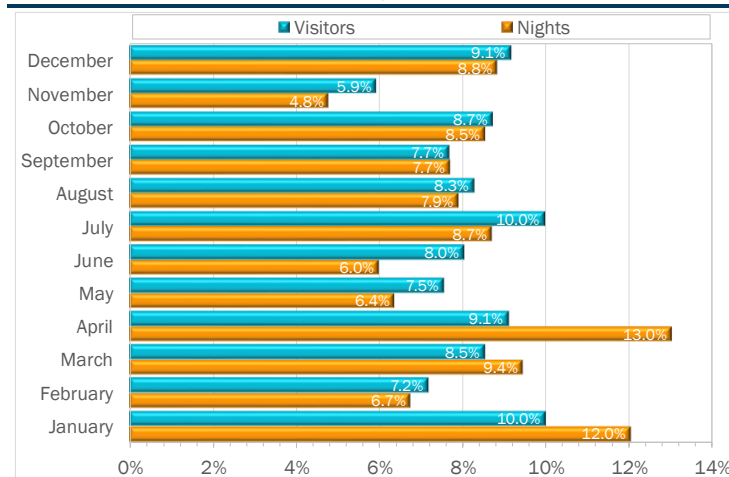
Origin market	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
Regional NSW	1,033	28.9%	3,653	26.8%	3.5
Sydney	1,177	33.0%	3,869	28.3%	3.3
Intrastate	2,209	61.9%	7,522	55.1%	3.4
Queensland	500	14.0%	2,417	17.7%	4.8
Victoria	443	12.4%	1,994	14.6%	4.5
ACT	200	5.6%	689	5.0%	3.4
Other interstate	218	6.1%	1,032	7.6%	4.7
Interstate	1,360	38.1%	6,133	44.9%	4.5
Total NSW	3,570		13,655		3.8

np = estimate considered statistically unreliable

Sydney (33.0%) was the largest source market of domestic overnight food travellers to NSW. Regional NSW (28.9%) was the 2nd largest, followed by Queensland (14.0%).

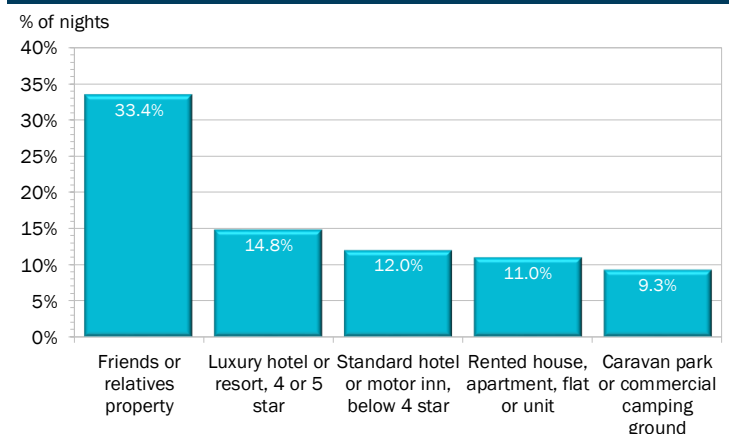
Sydney (28.3%) contributed more nights in the State than any other source market of domestic food travellers. Regional NSW (26.8%) was the 2nd largest, followed by Queensland (17.7%).

Month returned home from trip to NSW



More domestic overnight food travellers returned home from their visit to NSW in January (10.0%) than any other month. Over 1/8 (13.0%) of nights in the State by domestic food travellers were spent by those who returned home from the trip in April.

Accommodation used in NSW



'Friends or relatives property' (33.4%) was the most popular accommodation type used for nights in the State by domestic food travellers. 'Luxury hotel or resort, 4 or 5 star' (14.8%) was the 2nd most popular accommodation type, followed by 'standard hotel or motor inn, below 4 star' (12.0%) and 'rented house, apartment, flat or unit' (11.0%).

Domestic Market continued

Top places visited in NSW

Visitors		Nights			
Region	('000)	%	Region	('000)	%
Sydney	1,328	37.9%	Sydney	3,934	28.8%
North Coast NSW	637	18.2%	North Coast NSW	3,221	23.6%
South Coast NSW	429	12.2%	South Coast NSW	1,918	14.0%
The Hunter	350	10.0%	Central NSW	1,401	10.3%
Central NSW	314	9.0%	The Hunter	914	6.7%

np = estimate considered statistically unreliable

'Sydney (37.9%) was by far the most visited region in the State by domestic overnight food travellers. 'North Coast NSW' (18.2%) was the 2nd most visited, followed by 'South Coast NSW' (12.2%).

Domestic food travellers spent more **nights** in 'Sydney' (28.8%) than any other region in the State. 'North Coast NSW' (23.6%) had the 2nd most nights, followed by 'South Coast NSW' (14.0%).

Average length of stay in NSW

Domestic food travellers stayed an average of 3.8 nights in the State. This was longer than the average for all domestic visitors in NSW (3.1 nights).

Interstate food travellers spent an average of 1.1 nights longer in NSW than intrastate food travellers (4.5 nights vs 3.4 nights).

Queensland food travellers (4.8 nights) had the longest average stay in the State, followed by food travellers from South Australia (4.5 nights) and Victorian food travellers (4.5 nights).

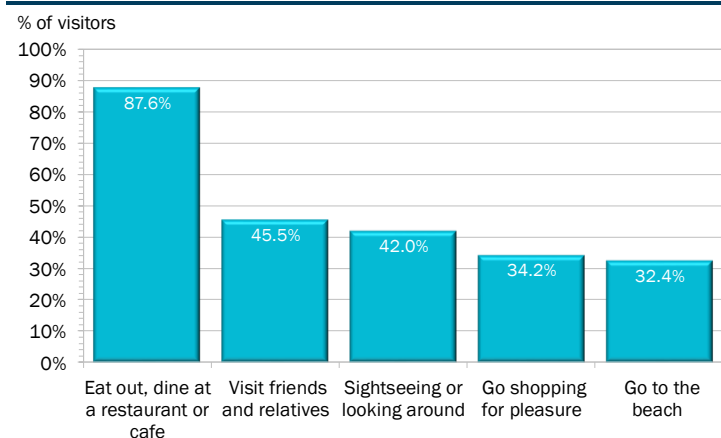
Transport in NSW

'Private vehicle or company car' (70.7%) was the most common transport used in the State by domestic overnight food travellers. 'Aircraft' (24.3%) was the 2nd most common, followed by 'railway' (4.0%).

Travel party

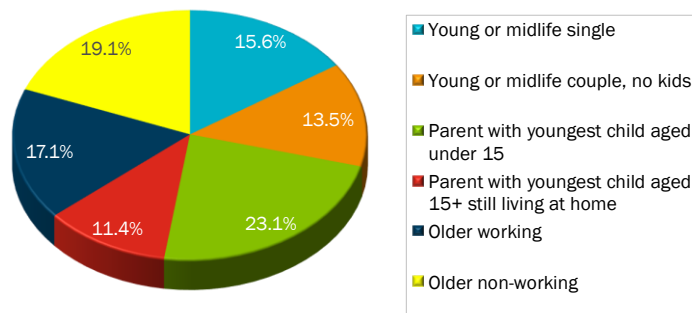
'Adult couple' (33.0%) was the most common travel party amongst domestic overnight food travellers to NSW. 'Alone' (24.9%) was the 2nd most common, followed by 'friends and relatives' (23.2%).

Activities in NSW



'Eat out, dine at a restaurant or cafe' (87.6%) was the most popular activity undertaken by domestic overnight food travellers in NSW. 'Visit friends and relatives' (45.5%) was the 2nd most popular activity, followed by 'sightseeing or looking around' (42.0%).

Lifecycle groups



Visitors

'Parent with youngest child aged under 15' (23.1%) was the most common lifecycle grouping amongst domestic overnight food travellers to NSW. 'Older non-working' (19.1%) was the 2nd most common, followed by 'older working' (17.1%).

Gender

A larger proportion of domestic overnight food travellers were female (50.4%) than male (49.6%).

Age groups

'50 to 59 years' (21.0%) was the biggest age group of domestic overnight food travellers. '40 to 49 years' (18.6%) was the 2nd biggest, followed by '15 to 29 years' (18.1%).

Marital status

Nearly ¾ (70.6%) of domestic overnight food travellers to NSW were 'part of a couple', while (29.2%) were 'single'.

Employment status

'Working full time' (57.0%) was the most common employment status amongst domestic overnight food travellers to NSW. 'Retired or on a pension' (19.3%) was the 2nd most common, followed by 'working part time' (15.1%).

Type of food experience in NSW

Food experience	Visitors to NSW		Visitors to Sydney		Visitors to regional NSW	
	('000)	%	('000)	%	('000)	%
Fine dining restaurants	2,122	59.4%	961	72.9%	1,178	51.8%
Local food markets	1,296	36.3%	339	25.7%	970	42.6%
Food festivals	192	5.4%	75	5.7%	117	5.1%
Pick your own fruit	118	3.3%	np	np	118	5.2%
Farm tour	82	2.3%	np	np	81	3.6%
Food tour	54	1.5%	np	np	48	2.1%
Cooking class	np	np	np	np	np	np

np = estimate considered statistically unreliable

'Fine dining restaurants' (59.4%) was the most popular food experience by domestic overnight NSW food travellers. 'Local food markets' (36.3%) was the 2nd most popular.

'Fine dining restaurants' was also the most popular food experience in Sydney (72.9%) and regional NSW (51.8%).

Further information

Please see www.destinationnsw.com.au for profiles on travel to each region in NSW and information on international and domestic travel to the State.