

# Wine Tourism to NSW

Year ended December 2018

For the period of January 2018 to December 2018

Sources: (1) National Visitor Survey (NVS) & (2) International Visitor Survey (IVS), YE Dec 18, Tourism Research Australia (TRA) - unless otherwise specified.



## 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	2.5	15.3	\$2.4	\$1,014	\$157

NSW received nearly 2.5 million international <sup>(1)</sup> and domestic <sup>(2)</sup> visitors who had been to at least one winery in the State - up by 26.4% on YE Dec 17. They spent over 15.3 million nights in NSW - up by 7.0% on YE Dec 17.

Visitors who had been to at least one winery in NSW spent an estimated \$2.4 billion <sup>(3)</sup> (incl package expenditure by overseas visitors) in the State - up by 8.6% on YE Dec 17.

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

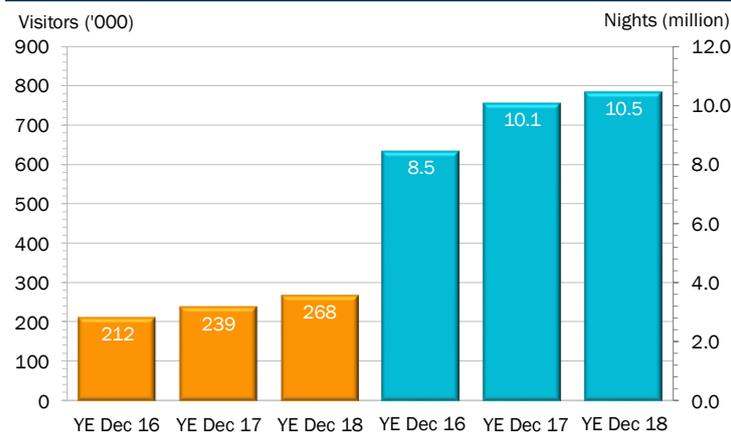
<sup>(2)</sup> Source: National Visitor Survey, YE Dec 18, Tourism Research Australia.

<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 267,600 international wine travellers - up by 12.2%\* on YE Dec 17. They spent nearly 10.5 million nights in the State - up by 3.6% on YE Dec 17.

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

International wine travellers spent an estimated \$1.2 billion in the State (incl 30% of prepaid package expenditure) - up by 3.1% on YE Dec 17. On average, they spent \$4,347 per visitor and \$111 per night.

### Market share

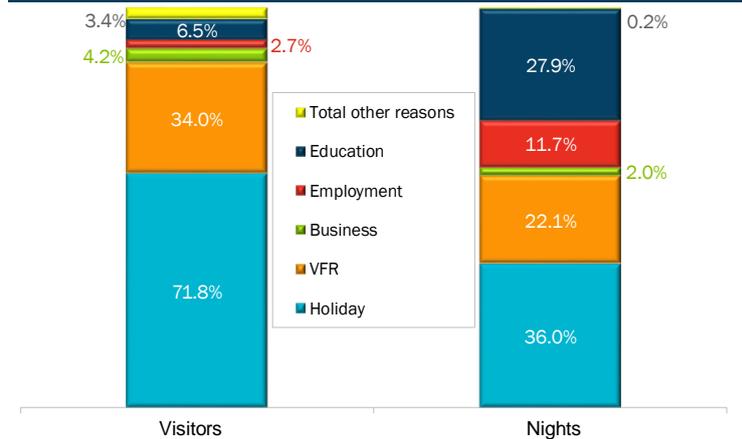
Wine travellers represented 6.1% of visitors and 10.9% of nights by all international travellers to the State. Compared with YE Dec 17, the share of visitors was up by 0.5% points and the share of nights was up by 0.1% point.

Spend by wine travellers represented 10.8% of expenditure by all international travellers to NSW. Compared with YE Dec 17, the share of expenditure was down by 0.1% point.

### First or return visitor

Nearly ½ (45.8%) of international NSW wine travellers were on a return visit to Australia. This was a lower percentage than for all visitors to the State (52.8%).

## Purpose of visit to NSW



'Holiday' (71.8%) was the largest purpose of visit to the State for international wine travellers. 'Visiting friends and relatives (VFR)' (34.0%) was the 2<sup>nd</sup> largest, followed by 'education' (6.5%).

'Holiday' (36.0%) was the largest purpose of visit in terms of nights in the State by international wine travellers. 'Education' (27.9%) was the 2<sup>nd</sup> largest, followed by 'VFR' (22.1%).

### Average length of stay in NSW

International wine travellers stayed an average of 39.1 nights in the State. This was substantially longer than the average for all international visitors in NSW (22 nights).

Japanese wine travellers (81.3 nights) had the longest average stay in the State, followed by wine travellers from India (81.2 nights) and Mainland Chinese wine travellers (42.6 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 Taiwan (64 nights) had the longest median stay in the State, followed by Indian wine travellers (63 nights) and wine travellers from Indonesia (52 nights).

### Origin

Rank	Origin market	Visitors		Nights		Average stay (nights)
		('000)	%	('000)	%	
1	South Korea	58	21.5%	1,461	14.0%	25.4
2	Mainland China	43	16.2%	1,845	17.6%	42.6
3	United Kingdom	36	13.4%	1,299	12.4%	36.3
4	USA	24	8.9%	579	5.5%	24.4
5	New Zealand	11	4.2%	np	np	np
	Other Asia (1)	53	19.7%	3,056	29.2%	58.1
	Other Europe (2)	27	10.1%	1,221	11.7%	45.1
	Other Countries	16	6.1%	754	7.2%	46.6
	Total NSW	268		10,459		39.1

np = estimate considered statistically unreliable

South Korea (21.5%) was the largest source market of international NSW wine travellers. Mainland China (16.2%) was the 2<sup>nd</sup> largest, followed by the United Kingdom (13.4%).

Mainland China (17.6%) contributed more nights in the State than any other source market of international wine travellers. South Korea (14.0%) was the 2<sup>nd</sup> largest, followed by the United Kingdom (12.4%).

(1) All Asian markets, excluding Mainland China and South Korea

(2) All European markets, excluding the United Kingdom

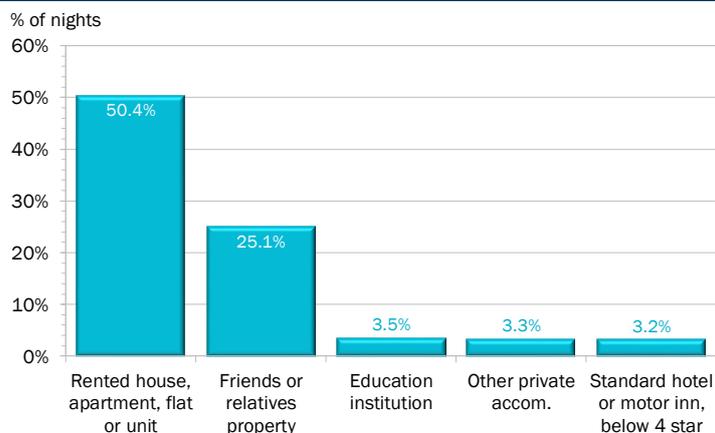
Please note: The information in this report is sourced from a sample survey, hence the results are subject to sampling variability.

\* The percentage change is statistically significant.

np = Not published due to insufficient sample.

## International Market continued

### Accommodation used in NSW



'Rented house, apartment, flat or unit' (50.4%) was the most popular accommodation type used for nights in the State by international wine travellers. 'Friends or relatives property' (25.1%) was the 2<sup>nd</sup> most popular accommodation type, followed by 'education institution' (3.5%).

### Seasonality

Over 1/3 (33.6%) of international NSW wine travellers departed Australia in the March quarter. Nearly 1/3 (32.8%) 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 3/5 (57.8%) had been to a winery in the region. International wine travellers spent over 2/3 (69.2%) of their **nights** in 'Hunter Valley'.

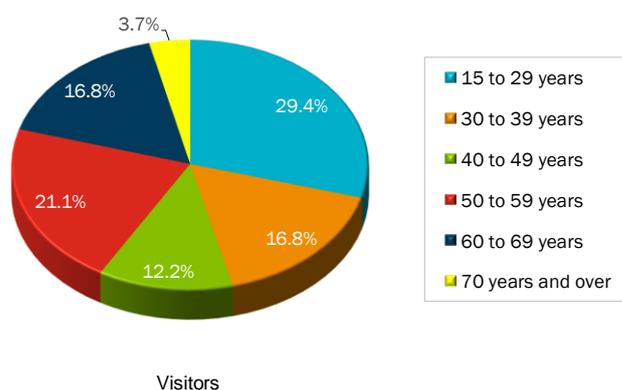
### Travel party

Over 2/5 (42.1%) 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' (15.9%).

### Gender

A larger proportion of international NSW wine travellers were female (59.7%) than male (40.3%).

### Age groups



'15 to 29 years' (29.4%) was the biggest age group of international NSW wine travellers. '50 to 59 years' (21.1%) was the 2<sup>nd</sup> biggest, followed by '30 to 39 years' (16.8%).

## Top places visited in NSW

Visitors		Nights	
Region	('000) %	Region	('000) %
Sydney	247 92.9%	Sydney	8,258 79.0%
The Hunter	59 22.3%	The Hunter	735 7.0%
North Coast NSW	37 14.0%	South Coast NSW	421 4.0%
South Coast NSW	20 7.7%	North Coast NSW	339 3.2%
Blue Mountains	15 5.6%	np	np

np = estimate considered statistically unreliable

'Sydney' (92.9%) was by far the most visited region in NSW by international wine **travellers**. 'The Hunter' (22.3%) was the 2<sup>nd</sup> most visited, followed by 'North Coast NSW' (14.0%).

International wine travellers spent more **nights** in 'Sydney' (79.0%) than any other region in the State. 'The Hunter' (7.0%) had the 2<sup>nd</sup> most nights, followed by 'South Coast NSW' (4.0%).

### Transport in NSW

'Private vehicle or company car' (34.4%) was the most common transport used in the State by international wine travellers. 'Aircraft' (27.0%) was the 2<sup>nd</sup> most common, followed by 'charter or tour bus' (17.5%).

### Travel package

Over 1/5 (21.3%) of international NSW wine travellers arrived in Australia on a travel package. This was a higher percentage than for all visitors to the State (16.2%).

'All accommodation' (90.3%) was the most popular travel arrangement included in the package by international NSW wine travellers (other than 'international airfares'), followed by 'most ground transport within Australia' (87.0%).

### Group tours

The rate of group tour travel to Australia amongst international NSW wine travellers was 18.2%. This was a higher percentage than for all visitors to the State (10.4%).

### Amount spent on wine consumed in Australia

Nearly 1/3 (31.6%) of international NSW wine travellers bought wine to consume in Australia. Of those who bought wine, '\$101 to \$500' (29.2%) was the most common expenditure range, followed by '\$51 to \$100' (20.8%). Nearly 1/3 (32.9%) spent more than \$100 on wine consumed in Australia.

### Activity at wineries

Activity at winery	Visitors to NSW	
	('000)	%
Wine tasting	238	88.9%
Purchase wine to take home	85	31.6%
Eat at a winery café or restaurant	84	31.3%
Purchase food at winery	31	11.8%
Attend a public event, concert or festivals	np	np
Cooking class	np	np
Winery tour	np	np
Sample food at the winery	np	np
Wine making class	np	np
Attend a private function	np	np

np = estimate considered statistically unreliable

'Wine tasting' (88.9%) was by far the most popular activity undertaken at a winery by international NSW wine travellers. 'Purchase wine to take home' (31.6%) was the 2<sup>nd</sup> most popular, followed by 'eat at a winery café or restaurant' (31.3%) and 'purchase food at winery' (11.8%).

## 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 over 1.4 million domestic overnight wine travellers - up by 12.6%\* on YE Dec 17. They spent nearly 4.9 million nights in the State - up by 15.0% on YE Dec 17.

### Expenditure (incl airfares and transport costs)

Domestic overnight wine travellers spent an estimated \$1.1 billion in the State - up by 5.3% on YE Dec 17. On average, they spent \$805 per visitor and \$220 per night.

### Market share

Wine travellers represented 4.1% of visitors and 4.5% of nights by all domestic overnight travellers to the State. Compared with YE Dec 17, the share of visitors was up by 0.1% point and the share of nights was up by 0.3% points.

Spend by wine travellers represented 5.1% of expenditure by all domestic overnight travellers to NSW. Compared with YE Dec 17, the share of expenditure was down by 0.4% points.

### Purpose of visit to NSW



'Holiday' (63.7%) was the largest purpose of visit to the State for domestic overnight wine travellers. 'Visiting friends and relatives (VFR)' (31.9%) was the 2<sup>nd</sup> largest, followed by 'business' (6.4%).

'Holiday' (63.9%) was the largest purpose of visit in terms of nights in the State by domestic wine travellers. 'VFR' (28.5%) was the 2<sup>nd</sup> largest, followed by 'business' (6.3%).

## Origin

Origin market	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
Regional NSW	348	24.3%	1,188	24.4%	3.4
Sydney	824	57.5%	2,253	46.4%	2.7
Intrastate	1,173	81.8%	3,441	70.8%	2.9
Victoria	95	6.6%	480	9.9%	5.1
Queensland	69	4.8%	453	9.3%	6.5
ACT	65	4.6%	np	np	np
Other interstate	np	np	np	np	np
Interstate	261	18.2%	1,420	29.2%	5.4
Total NSW	1,433		4,861		3.4

np = estimate considered statistically unreliable

Sydney (57.5%) was the largest source market of domestic overnight wine travellers to NSW. Regional NSW (24.3%) was the 2<sup>nd</sup> largest, followed by Victoria (6.6%).

Sydney (46.4%) contributed more nights in the State than any other source market of domestic wine travellers. Regional NSW (24.4%) was the 2<sup>nd</sup> largest, followed by Victoria (9.9%).

### Average length of stay in NSW

Domestic wine travellers stayed an average of 3.4 nights in the State. This was longer than the average for all domestic visitors in NSW (3.1 nights).

Queensland wine travellers (6.5 nights) had the longest average stay in the State, followed by wine travellers from Victoria (5.1 nights) and regional NSW wine travellers (3.4 nights).

### Seasonality

More domestic overnight wine travellers returned home from their visit to NSW in July (10.3%) than any other month. Nearly 1/5 (15.5%) 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' (90.5%) was the most common transport used in the State by domestic overnight wine travellers. 'Aircraft' (5.0%) was the 2<sup>nd</sup> most common, followed by 'bus or coach' (2.2%).

### Accommodation used in NSW



'Friends or relatives property' (22.3%) was the most popular accommodation type used for nights in the State by domestic wine travellers. 'Standard hotel or motor inn, below 4 star' (16.4%) was the 2<sup>nd</sup> most popular accommodation type, followed by 'rented house, apartment, flat or unit' (15.5%).

## Domestic Market continued

### Top places visited in NSW

Region	Visitors		Region	Nights	
	('000)	%		('000)	%
The Hunter	532	40.1%	The Hunter	1,376	28.3%
Central NSW	296	22.3%	Central NSW	892	18.3%
South Coast NSW	185	13.9%	South Coast NSW	825	17.0%
Capital Country	124	9.3%	North Coast NSW	655	13.5%
North Coast NSW	108	8.1%	np	np	np

np = estimate considered statistically unreliable

'The Hunter' (40.1%) was by far the most visited region in NSW by domestic overnight wine **travellers**. 'Central NSW' (22.3%) was the 2<sup>nd</sup> most visited, followed by 'South Coast NSW' (13.9%).

Domestic wine travellers spent more **nights** in 'The Hunter' (28.3%) than any other region in the State. 'Central NSW' (18.3%) had the 2<sup>nd</sup> most nights, followed by 'South Coast NSW' (17.0%).

### Activities in NSW

'Eat out, dine at a restaurant or cafe' (85.9%) was the most popular activity undertaken by domestic overnight wine travellers in NSW. 'Visit wineries' (75.0%) was the 2<sup>nd</sup> most popular activity, followed by 'sightseeing or looking around' (44.7%).

### Travel party

'Friends and relatives' (34.5%) was the most common travel party amongst domestic overnight wine travellers to NSW. 'Adult couple' (34.4%) was the 2<sup>nd</sup> most common, followed by 'alone' (14.5%).

### Gender

A larger proportion of domestic overnight wine travellers were female (56.9%) than male (43.1%).

### Age groups

'15 to 29 years' (20.5%) was the biggest age group of domestic overnight wine travellers. '50 to 59 years' (19.3%) was the 2<sup>nd</sup> biggest, followed by '30 to 39 years' (18.5%).

### Lifecycle groups

'Older non-working' (20.9%) was the most common lifecycle grouping amongst domestic overnight wine travellers to NSW. 'Parent with youngest child aged under 15' (20.4%) was the 2<sup>nd</sup> most common, followed by 'young or midlife single' (17.5%).

### Wine regions visited in NSW

Wine region	Visitors		Wine region	Nights	
	('000)	%		('000)	%
Hunter Valley	582	40.6%	Hunter Valley	1,825	37.6%
Mudgee	147	10.3%	Shoalhaven	569	11.7%
Orange	132	9.2%	Mudgee	557	11.5%
Shoalhaven	114	7.9%	Orange	475	9.8%
Southern Highlands	106	7.4%	Southern Highlands	np	np
Canberra & Surrounds	103	7.2%	Canberra & Surrounds	np	np
Riverina	np	np	Riverina	np	np
Other NSW	245	17.1%	Other NSW	1,047	21.5%

np = estimate considered statistically unreliable

'Hunter Valley' (40.6%) was by far the most visited wine region in NSW by domestic overnight wine **travellers**. 'Mudgee' (10.3%) was the 2<sup>nd</sup> most visited, followed by 'Orange' (9.2%).

Domestic wine travellers spent more **nights** in 'Hunter Valley' (37.6%) than any other wine region in the State. 'Shoalhaven' (11.7%) had the 2<sup>nd</sup> most nights, followed by 'Mudgee' (11.5%).

## Activity at wineries

Activity at winery	Visitors to NSW	
	('000)	%
Wine tasting	985	68.7%
Purchase wine to take home	887	61.9%
Eat at a winery café or restaurant	654	45.6%
Purchase food at winery	435	30.3%
Attend a public event, concert or festivals	81	5.7%
Attend a private function	np	np
Winery tour	np	np
Sample food at the winery	np	np
Cooking class	np	np
Wine making class	np	np

np = estimate considered statistically unreliable

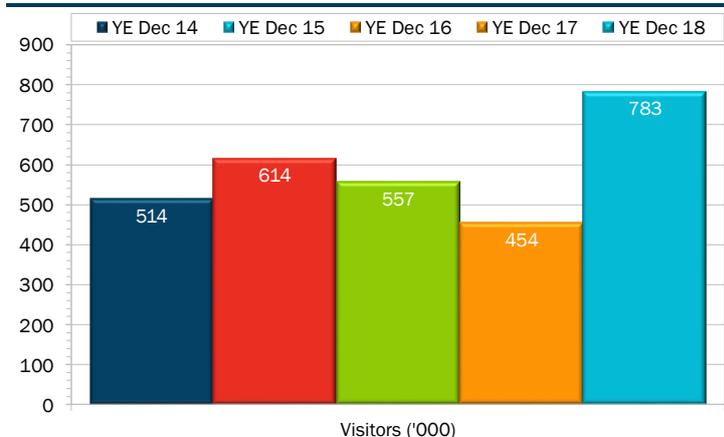
'Wine tasting' (68.7%) was the most popular activity undertaken at a NSW winery by domestic overnight wine travellers. 'Purchase wine to take home' (61.9%) was the 2<sup>nd</sup> most popular, followed by 'eat at a winery café or restaurant' (45.6%) and 'purchase food at winery' (30.3%).

### Amount spent on wine to take home from wineries

Over 3/5 (61.9%) of domestic overnight wine travellers to NSW bought wine to take home from the winery. Of those who bought wine, '\$101 to \$500' (43.0%) was the most common expenditure range, followed by '\$51 to \$100' (24.7%).

Almost 1/2 (49.8%) spent more than \$100 at the wineries.

### Domestic daytrips to NSW



NSW received 783,000 domestic daytrip wine visitors - up by 72.3%\* on YE Dec 17.

### Expenditure (incl airfares and transport costs)

Domestic daytrip wine travellers spent an estimated \$183 million in the State - up by 127%\* on YE Dec 17. On average, they spent \$234 per visit.

### Market share

Wine travellers represented 1.3% of all domestic daytrip visitors to the State. Compared with YE Dec 17, the share was up by 0.5% points.

Spend by wine travellers represented 2.6% of expenditure by all domestic daytrip travellers to NSW. Compared with YE Dec 17, the share of expenditure was up by 1.3% points.

### 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.