

Destination NSW Westpac Tourism Expenditure Monitor



RESULTS FOR PERIOD
NOVEMBER 2019



Report Overview

This Monitor has been developed in a collaborative partnership between Destination NSW and Westpac. It will ultimately boost our State's ability to attract more visitors by improving our understanding of how people spend money when they travel throughout NSW. This Monitor should prove particularly beneficial for tourism bodies and operators in rural and remote areas of our State, and assist in ensuring we remain Australia's number one tourist destination.

This Monitor is designed to complement the National Visitor Survey, which is published quarterly by Tourism Research Australia. The Monitor data is reported by Tourism Region (geographical areas managed by the Commonwealth Government for research and reporting purposes) and provides top-level monthly reporting on tourism expenditure in NSW, including:

- The number of visitors to a region – defined as, those who reside greater than 50km from the region;
- The number of transactions undertaken by visitors; and
- The value of visitor spending.

In providing greater understanding of tourism expenditure throughout NSW, this Monitor will be pivotal in benchmarking performance, identifying trends and highlighting opportunities for tourism growth.

This report includes information for the period July 2019 to November 2019 including monthly data and quarterly time-series data. All data is de-identified and aggregated and it is managed securely and responsibly in order to deliver this Monitor. The appendices in this report includes guidance on how to interpret information in this report.

Section 1: Regional Summary

DESTINATION NSW WESTPAC
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Visitation Metrics By Tourism Region

Visitation count and share, volume transactions and value spend by tourism region

NSW Tourism Region	Visitation Count ('000)	Volume Transactions ('000)	Value Spend (\$'000)	Share of visitation from visitors (%)
Blue Mountains	33.6	72.8	\$3,250.9	34%
Capital Country	97.6	218.7	\$9,889.8	53%
Central Coast	73.6	189.8	\$8,076.5	22%
Central NSW	67.1	229.9	\$12,087.5	53%
Hunter	182.2	456.4	\$20,210.0	31%
New England North West	40.8	137.8	\$7,085.0	57%
North Coast	199.0	671.6	\$29,121.5	47%
Outback NSW	8.1	30.6	\$1,427.4	61%
Riverina	53.6	179.1	\$8,733.3	61%
Snowy Mountains	22.1	58.5	\$2,604.2	68%
South Coast	154.6	428.8	\$19,171.3	37%
Sydney	795.5	2,043.3	\$84,063.3	11%
The Murray	48.1	128.6	\$6,659.8	61%

Values are rounded to 1 significant figure, with percentages rounded to whole numbers.

Results period: November 2019.

Please refer to the appendix for how to interpret this table.

Interstate Visitation By Tourism Region

% Value spend within NSW tourism region by state of visitor origin

NSW Tourism Region	New South Wales	Victoria	Queensland	South Australia	Western Australia	Tasmania	Northern Territory	Australian Capital Territory
Blue Mountains	84%	5%	5%	1%	2%	0%	0%	2%
Capital Country	79%	5%	5%	1%	1%	0%	1%	7%
Central Coast	84%	4%	7%	0%	2%	0%	0%	2%
Central NSW	83%	4%	6%	1%	1%	0%	0%	3%
Hunter	79%	6%	8%	1%	3%	0%	0%	2%
New England North West	78%	4%	14%	1%	1%	0%	0%	1%
North Coast	62%	12%	20%	1%	2%	0%	0%	2%
Outback NSW	56%	12%	13%	11%	5%	0%	1%	1%
Riverina	77%	8%	6%	2%	1%	0%	0%	4%
Snowy Mountains	71%	9%	5%	1%	2%	0%	0%	11%
South Coast	73%	8%	4%	1%	2%	0%	0%	11%
Sydney	49%	17%	16%	4%	5%	1%	1%	7%
The Murray	37%	50%	5%	3%	1%	0%	1%	2%

Percentages are rounded to whole numbers.

Results period: November 2019.

Please refer to the appendix for how to interpret this table.

Section 2: For Every \$100 Spent Analysis

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Tourism Satellite Account Expenditure

NOV 2019

For every \$100 spent by visitors, what is it spent on?

Tourism Satellite Account	Sydney Value Spend	Regional NSW Average Value Spend
Accommodation and accommodation services for visitors	\$6.17	\$7.10
Air passenger transport and transport services	\$0.18	\$0.01
Cultural services and activities	\$0.67	\$0.51
Food and beverage serving services and activities	\$21.86	\$18.92
Groceries and off premise alcohol	\$11.86	\$21.46
Other (non-tourism related)*	\$29.29	\$24.71
Public transport	\$1.07	\$0.06
Retail and country specific tourism characteristic goods	\$13.70	\$7.49
Road passenger transport and transport services	\$12.32	\$16.25
Sports and recreational and activities	\$1.55	\$2.66
Transport equipment rental and rental services	\$0.52	\$0.26
Travel agencies and other reservation services and service activities	\$0.46	\$0.43
Water passenger transport and transport services	\$0.35	\$0.14

Values rounded to two significant figures.

Results period: November 2019.

Please refer to the appendix for how to interpret this table.

*This Tourism Satellite Account reflects goods and services provided across a variety of industries (e.g. building and construction, healthcare, banking etc.).

Section 3: Quarterly Trends

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Visitors By Tourism Region Over Time

JUL – NOV
2019

6 month review on the number of *Visitors ('000)*

NSW Tourism Region	Jul-19	Aug-19	Sep-19	Q3-2019 Average	Oct-19	Nov-19	Dec-19	Q4-2019 Average
Blue Mountains	43	38	37	40	43	34	-	38
Capital Country	99	94	93	95	108	98	-	103
Central Coast	71	75	72	72	84	74	-	79
Central NSW	79	71	74	75	87	67	-	77
Hunter	172	163	165	167	186	182	-	184
New England North West	52	51	51	51	49	41	-	45
North Coast	231	182	195	203	236	199	-	218
Outback NSW	15	13	12	13	11	8	-	9
Riverina	53	50	53	52	61	54	-	57
Snowy Mountains	50	54	37	47	21	22	-	21
South Coast	117	109	122	116	157	155	-	156
Sydney	780	782	772	778	800	795	-	798
The Murray	35	33	38	35	48	48	-	48

Values are rounded to whole numbers.

Results period: January to November 2019.

Please refer to the appendix for how to interpret this table.

Value Spend By Tourism Region Over Time

JUL – NOV
2019

6 month review on the total *Value Spend* (\$'000)

NSW Tourism Region	Jul-19	Aug-19	Sep-19	Q3-2019 Average	Oct-19	Nov-19	Dec-19	Q4-2019 Average
Blue Mountains	\$4,277	\$3,499	\$3,521	\$3,765	\$4,108	\$3,251	-	\$3,679
Capital Country	\$9,226	\$9,002	\$8,865	\$9,031	\$10,300	\$9,890	-	\$10,095
Central Coast	\$7,529	\$7,373	\$7,312	\$7,405	\$8,794	\$8,076	-	\$8,435
Central NSW	\$13,075	\$12,075	\$12,154	\$12,435	\$14,165	\$12,087	-	\$13,126
Hunter	\$18,256	\$17,975	\$17,503	\$17,911	\$20,235	\$20,210	-	\$20,222
New England North West	\$7,848	\$7,854	\$7,610	\$7,771	\$7,484	\$7,085	-	\$7,285
North Coast	\$30,646	\$25,575	\$27,311	\$27,844	\$31,873	\$29,122	-	\$30,497
Outback NSW	\$2,631	\$2,268	\$2,180	\$2,360	\$1,928	\$1,427	-	\$1,678
Riverina	\$8,554	\$8,453	\$8,574	\$8,527	\$9,152	\$8,733	-	\$8,943
Snowy Mountains	\$9,395	\$9,526	\$5,290	\$8,070	\$2,727	\$2,604	-	\$2,666
South Coast	\$14,897	\$14,248	\$15,186	\$14,777	\$20,206	\$19,171	-	\$19,689
Sydney	\$78,861	\$79,918	\$77,243	\$78,674	\$81,733	\$84,063	-	\$82,898
The Murray	\$4,927	\$4,818	\$5,325	\$5,023	\$6,811	\$6,660	-	\$6,736

Values are rounded to whole numbers.
Results period: January to November 2019.
Please refer to the appendix for how to interpret this table.

Appendix: How to Read Tables Terms & Conditions

DESTINATION NSW WESTPAC
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How to interpret tables

The tables below are to be used for explanatory purposes only.

Section 1: Regional Summary

Visitation Metrics By Tourism Region - A high level look at visitor expenditure and relative metrics for the Tourism Region.

NSW Tourism Region	Visitation Count ('000)	Volume Transactions ('000)	Value Spend (\$'000)	Share of visitation from visitors (%)
Tourism Region A (e.g. North Coast)	210	522	\$25,418	50%

In the Tourism Region A, approximately 210 ('000) Visitors undertook Westpac domestic card transactions in the month (e.g. June 2019). Visitors accounted for 50% of the card transactions spend in the Tourism Region in the month. These Visitors made over 522 ('000) transactions, with a total value of over \$25m worth of expenditure for the month.

Definitions

- Visitation Count: the total number of de-identified Westpac domestic cardholders who transacted at least once in the region across the reporting period.
- Visitors: the number of de-identified Westpac domestic cardholders who reside greater than 50km from the region.
- Volume Transactions: the total number of transactions made by de-identified Westpac domestic cardholders in the region across the reporting period.
- Value Spend: the total value of transactions made by de-identified Westpac domestic cardholders in the region across the reporting period.
- De-identified means that the information does not identify an individual.

How to interpret tables

The tables below are to be used for explanatory purposes only.

Section 1: Regional Summary Continued...

Interstate Visitation Spend By Tourism Region - A breakdown of expenditure for each NSW tourism region based on the domestic visitors state of origin.

NSW Tourism Region	New South Wales	Victoria	Queensland	South Australia	Western Australia	Tasmania	Northern Territory	Australian Capital Territory
Tourism Region A	81%	5%	6%	1%	4%	0%	0%	2%
Tourism Region B	71%	7%	6%	3%	1%	0%	0%	10%

81% of expenditure by Visitors to Tourism Region A was made by NSW residents during the month.

Definitions

- Value Spend: the total value of transactions made by de-identified Westpac domestic cardholders in the region across the reporting period.
- Visitors: the number of de-identified Westpac domestic cardholder(s) who reside greater than 50km from the region.
- De-identified means that the information does not identify an individual.

How to interpret tables

The tables below are to be used for explanatory purposes only.

Section 2: For Every \$100 Spent

Tourism Satellite Account Expenditure - A break down for every \$100 spent by visitors by service type

Tourism Satellite Account	Sydney Value Spend	Regional NSW Average Value Spend
Accommodation and accommodation services for visitors	\$2.10	\$6.25
Air passenger transport and transport services	\$0.03	\$0.01
Cultural services and activities	\$0.05	\$0.46

\$6.25 for every \$100 of Visitor spend is spent on accommodation or accommodation services within regional NSW Tourism Regions. This is the average for all Tourism Regions except Sydney.

Definitions

- Value Spend: the dollar amount per category for every \$100 spent by de-identified Westpac domestic cardholders in the region across the reporting period.
- Visitors: the number of de-identified Westpac domestic cardholders who reside greater than 50km from the region.
- Tourism Satellite Accounts: a grouping of tourism related expenditure by tourism service type.
- Sydney Value Spend: the dollar amount per service type for every \$100 spent in the Sydney region by de-identified Westpac domestic cardholders across the reporting period.
- Regional NSW Average Value Spend: the dollar amount per service type for every \$100 spent in the regions by de-identified Westpac domestic cardholders across the reporting period (averaged across all non-Sydney regions).
- De-identified means that the information does not identify an individual.

How to interpret tables

The tables below are to be used for explanatory purposes only.

Section 4: Quarterly Trend

Visitors By Tourism Region Over Time - A look at the number of visitors per tourism region for the previous 6 months

NSW Tourism Region	Jan-19	Feb-19	Mar-19	Q1-2019 Average	Apr-19	May-19	Jun-19	Q2-2019 Average
Tourism Region A	38	29	35	34	52	36	41	43

The table in this section shows the month on month number of Visitors for each region in thousands as well as the average for the quarter. In this example we see the values for Tourism Region A for the months of January to June 2019 including the two quarterly averages for first and second Quarters of 2019. For the example shown there were over 38 ('000) Visitors to Tourism Region A for January 2019 and the average number of Visitors for the first Quarter in Tourism Region A is around 34 ('000) visitors per month.

Definitions

- Visitation count: the total number of de-identified Westpac domestic cardholders who spent at least once in the region across the reporting period.
- Visitors: the number of de-identified Westpac domestic cardholder(s) who reside greater than 50km from the region.
- De-identified means that the information does not identify an individual.

How to interpret tables

The tables below are to be used for explanatory purposes only.

Section 4: Quarterly Trend Continued...

Value Spend By Tourism Region Over Time - A look at spend per tourism region for the previous 6 months

NSW Tourism Region	Jan-19	Feb-19	Mar-19	Q1-2019 Average	Apr-19	May-19	Jun-19	Q2-2019 Average
Tourism Region A	\$4,192	\$2,817	\$3,507	\$3,505	\$5,043	\$3,726	\$3,793	\$4,187

The table in this section shows the month on month spend for each region in thousands as well as the average for the quarter. In this example we see the values for Tourism Region A for the months of January to June 2019 including the two quarterly averages for first and second Quarters of 2019. For the example shown the spend was over \$4.2m to Tourism Region A for January 2019 and the average number of spend for the first Quarter in Tourism Region A is around \$3.5m .

Definitions:

- Value Spend: the total value of transactions made by de-identified Westpac domestic cardholders in the region across the reporting period.
- Visitors: the number of de-identified Westpac domestic cardholder(s) who reside greater than 50km from the region.
- De-identified means that the information does not identify an individual.

General Terms and Conditions / Important Disclaimers

Things you should know

Westpac Institutional Bank is a division of Westpac Banking Corporation
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This information is current as at July 2019.

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The data in this document represents an unbiased sample of de-identified and aggregated Westpac cardholders who have made purchases in NSW in the reporting period. The data should only be considered as indicative. Some of the limitations associated with the data include the following:

- The data does not represent everyone who made a transaction in NSW.
- The data does not contain cash transactions and it is restricted to Australian residents only.
- The data does not differentiate between single purchases and

purchases made on behalf of a group so cannot be used to calculate the total number of visitors in an area.

- The data has been weighted against Australian Bureau of Statistics population estimates, but there may be differences in how Westpac classifies demographics. Similarly, Westpac may classify tourism related spend differently to the tourism satellite accounts.

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