

Destination NSW Westpac Tourism Expenditure Monitor



RESULTS FOR PERIOD
September 2020



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 April 2020 to September 2020 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
TOURISM EXPENDITURE MONITOR

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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	40.8	94.4	\$4,096.9	37%
Capital Country	86.8	212.8	\$9,440.9	49%
Central Coast	75.1	203.8	\$8,329.0	23%
Central NSW	82.8	313.9	\$15,889.7	58%
Hunter	180.2	490.7	\$21,785.3	31%
New England North West	43.0	160.7	\$7,789.8	59%
North Coast	185.3	695.1	\$32,055.8	45%
Outback NSW	14.6	58.6	\$2,907.0	74%
Riverina	44.6	172.0	\$8,350.6	56%
Snow y Mountains	32.2	111.8	\$4,781.1	76%
South Coast	148.8	455.7	\$20,058.1	36%
Sydney	431.7	1,211.4	\$49,957.5	7%
The Murray	23.9	88.8	\$4,547.0	45%

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

Results period: September 2020

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	93%	1%	2%	1%	0%	0%	0%	2%
Capital Country	86%	2%	3%	1%	0%	1%	0%	6%
Central Coast	87%	2%	5%	1%	3%	0%	0%	2%
Central NSW	89%	2%	3%	1%	1%	0%	0%	3%
Hunter	85%	4%	5%	1%	3%	0%	0%	2%
New England North West	88%	3%	7%	1%	0%	0%	0%	1%
North Coast	80%	5%	7%	1%	1%	0%	0%	4%
Outback NSW	81%	5%	4%	5%	1%	0%	0%	3%
Riverina	86%	5%	4%	1%	1%	0%	0%	4%
Snowy Mountains	84%	3%	4%	1%	2%	0%	0%	7%
South Coast	80%	4%	2%	1%	1%	0%	0%	12%
Sydney	60%	9%	15%	3%	4%	1%	0%	8%
The Murray	48%	44%	3%	1%	1%	0%	0%	2%

Percentages are rounded to whole numbers

Results period: September 2020

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

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	\$2.47	\$5.93
Air passenger transport and transport services	\$0.04	\$0.00
Cultural services and activities	\$0.11	\$0.52
Food and beverage serving services and activities	\$18.47	\$20.83
Groceries and off premise alcohol	\$16.09	\$22.56
Other (non-tourism related)*	\$34.44	\$25.47
Public transport	\$0.43	\$0.06
Retail and country specific tourism characteristic goods	\$11.58	\$7.60
Road passenger transport and transport services	\$13.96	\$13.85
Sports and recreational and activities	\$1.57	\$2.72
Transport equipment rental and rental services	\$0.68	\$0.23
Travel agencies and other reservation services and service activities	\$0.04	\$0.09
Water passenger transport and transport services	\$0.10	\$0.16

Values are rounded to 2 significant figures

Results period: September 2020

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

APR - SEP
2020

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

NSW Tourism Region	Apr-20	May-20	Jun-20	Q2-2020 Average	Jul-20	Aug-20	Sep-20	Q3-2020 Average
Blue Mountains	12	25	45	27	51	44	41	45
Capital Country	31	57	92	60	104	82	87	91
Central Coast	24	44	63	43	77	67	75	73
Central NSW	27	44	68	47	85	71	83	79
Hunter	59	100	159	106	197	156	180	178
New England North West	17	26	37	27	52	40	43	45
North Coast	61	100	168	109	234	161	185	193
Outback NSW	3	5	9	6	14	11	15	13
Riverina	26	36	46	36	47	40	45	44
Snowy Mountains	11	15	23	16	38	40	32	37
South Coast	46	86	153	95	162	121	149	144
Sydney	212	317	414	314	479	396	432	436
The Murray	15	23	36	25	27	20	24	24

Values are rounded to whole numbers.

Results period: April to September 2020

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

Value Spend By Tourism Region Over Time

APR - SEP
2020

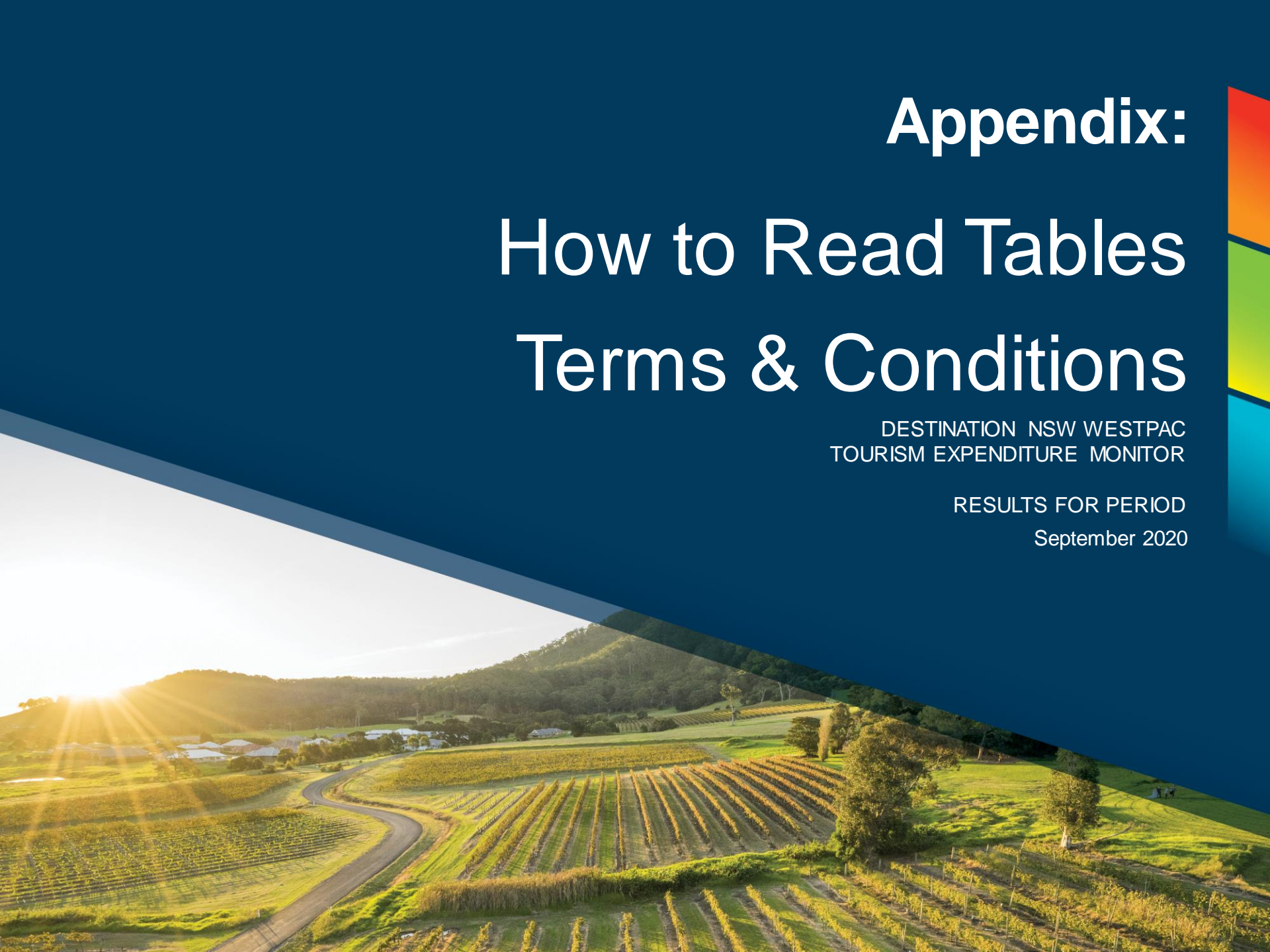
6 month review on the total Value Spend (\$'000)

NSW Tourism Region	Apr-20	May-20	Jun-20	Q2-2020 Average	Jul-20	Aug-20	Sep-20	Q3-2020 Average
Blue Mountains	\$1,529	\$2,368	\$3,938	\$2,612	\$5,086	\$4,106	\$4,097	\$4,430
Capital Country	\$4,908	\$6,745	\$9,247	\$6,967	\$10,585	\$8,958	\$9,441	\$9,661
Central Coast	\$3,596	\$5,671	\$6,968	\$5,412	\$8,499	\$7,418	\$8,329	\$8,082
Central NSW	\$6,553	\$9,448	\$12,385	\$9,462	\$15,783	\$13,708	\$15,890	\$15,127
Hunter	\$8,153	\$12,200	\$18,184	\$12,846	\$23,265	\$18,743	\$21,785	\$21,265
New England North West	\$4,064	\$5,486	\$6,599	\$5,383	\$8,930	\$7,292	\$7,790	\$8,004
North Coast	\$11,654	\$16,217	\$23,923	\$17,265	\$34,261	\$26,509	\$32,056	\$30,942
Outback NSW	\$891	\$1,192	\$1,802	\$1,295	\$2,863	\$2,284	\$2,907	\$2,685
Riverina	\$5,090	\$6,904	\$7,827	\$6,607	\$8,881	\$7,872	\$8,351	\$8,368
Snowy Mountains	\$1,523	\$1,937	\$3,091	\$2,184	\$6,654	\$7,118	\$4,781	\$6,184
South Coast	\$8,108	\$12,381	\$18,807	\$13,099	\$21,221	\$15,689	\$20,058	\$18,989
Sydney	\$24,597	\$38,074	\$48,586	\$37,086	\$56,716	\$45,620	\$49,957	\$50,764
The Murray	\$2,901	\$3,917	\$5,306	\$4,041	\$4,550	\$3,860	\$4,547	\$4,319

Values are rounded to whole numbers.

Results period: April to September 2020

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



Appendix: How to Read Tables Terms & Conditions

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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 TourismRegion 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 breakdown 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 TourismRegion 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 TourismRegion A for January 2019 and the average number of Visitors for the first Quarter in TourismRegion 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 ABN 33 007 457 141 ('Westpac').

This information is current as at September 2020

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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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