Food tourism to NSW is defined as visitors who have had a food experience in NSW such as 'food festivals', 'food markets', 'farm tours', 'food tours', 'pick your own fruit', 'cooking classes' and 'fine dining restaurants'.

This report provides a snapshot for the year ended (YE) December 2019, as well as visitation trend. It will serve as benchmark for assessing impact of Australia’s bushfire 2019-20 and COVID-19 pandemic on this segment.

NSW is the top destination for food visitors in Australia. Eating at fine dining restaurants is the most popular food experience followed by visiting local food markets.

### How big is the market?

#### TOTAL DOMESTIC & INTERNATIONAL FOOD VISITATION

<table>
<thead>
<tr>
<th></th>
<th>Visitors</th>
<th>Nights</th>
<th>Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>International travel</td>
<td>1.3m</td>
<td>42.5m</td>
<td>$5.2bn</td>
</tr>
<tr>
<td></td>
<td>-3.4% YoY</td>
<td>0.4%</td>
<td>+2.2% YoY</td>
</tr>
<tr>
<td>Domestic Overnight</td>
<td>4.0m</td>
<td>14.9m</td>
<td>$3.8bn</td>
</tr>
<tr>
<td></td>
<td>+10.6% YoY</td>
<td>+9.0%</td>
<td>+7.7% YoY</td>
</tr>
</tbody>
</table>

*YoY = change on previous year

Spend per night of food visitors to NSW was $198 compared to $157 for all overnight visitors to NSW, 26% higher.

#### Ranking in Australia

**Total International and Domestic Overnight travel**

- **Visitors**
  - #1 for visitors
  - #1 for nights
  - #1 for expenditure

**Domestic Overnight travel**

- **Visitors**
  - 4.0m (+10.6% YoY)

**Expenditure (YE Dec 2019)**

- **Visitors**
  - 1.3m

- **Nights**
  - 13.7m

- **Expenditure**
  - $5.2bn (+2.2% YoY)

ALOS = average length of stay

#### Market share

**Visitors (YE Dec 2019)**

- International: 24%
- Domestic Overnight: 76%

**Nights (YE Dec 2019)**

- International: 74%
- Domestic Overnight: 26%

**Expenditure (YE Dec 2019)**

- International: 58%
- Domestic Overnight: 42%

**YE = year ended**

#### Time series

**Visitors**

- YE Dec 2017: 3.6m
- YE Dec 2018: 3.6m
- YE Dec 2019: 4.0m

**Nights**

- YE Dec 2017: 13.7m
- YE Dec 2018: 13.7m
- YE Dec 2019: 14.9m

**Expenditure**

- YE Dec 2017: $3.1bn
- YE Dec 2018: $3.5bn
- YE Dec 2019: $3.8bn

#### Food experiences in NSW

<table>
<thead>
<tr>
<th></th>
<th>International</th>
<th>Domestic Overnight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fine dining restaurants</td>
<td>54%</td>
<td>37%</td>
</tr>
<tr>
<td>Local food markets</td>
<td>54%</td>
<td>12%</td>
</tr>
<tr>
<td>Food festivals</td>
<td>12%</td>
<td>7%</td>
</tr>
<tr>
<td>Farm tour</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Pick your own fruit</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Food tour</td>
<td>1%</td>
<td>n/p</td>
</tr>
<tr>
<td>Cooking class</td>
<td>0.4%</td>
<td>n/p</td>
</tr>
</tbody>
</table>

Note: Number of visitors by visitor type may not add up to total due to rounding; percentages may not add up to 100% due to rounding; n/p indicates data not publishable.
A Taste of NSW - Food Tourism
Year ended December 2019
Source: National and International Visitor Surveys, Tourism Research Australia.

Location of food experiences

<table>
<thead>
<tr>
<th></th>
<th>International</th>
<th>Domestic Overnight</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Visitors to NSW</td>
<td>Visitors to Sydney</td>
</tr>
<tr>
<td></td>
<td>('000)</td>
<td>%</td>
</tr>
<tr>
<td>Local food markets</td>
<td>668</td>
<td>54%</td>
</tr>
<tr>
<td>Fine dining restaurants</td>
<td>679</td>
<td>54%</td>
</tr>
<tr>
<td>Food festivals</td>
<td>154</td>
<td>12%</td>
</tr>
<tr>
<td>Farm tour</td>
<td>40</td>
<td>3%</td>
</tr>
<tr>
<td>Pick your own fruit</td>
<td>33</td>
<td>3%</td>
</tr>
<tr>
<td>Food tour</td>
<td>18</td>
<td>1%</td>
</tr>
<tr>
<td>Cooking class</td>
<td>5</td>
<td>0.4%</td>
</tr>
</tbody>
</table>

Note: Some data are not publishable. Visitors may have participated in more than one food experience and hence the percent will not add to 100%. Food experiences are sorted in decreasing order of popularity.

Top activities

<table>
<thead>
<tr>
<th></th>
<th>International</th>
<th>Domestic Overnight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eat out / dine at a restaurant and/or cafe</td>
<td>94%</td>
<td>89%</td>
</tr>
<tr>
<td>Go shopping for pleasure</td>
<td>82%</td>
<td>44%</td>
</tr>
<tr>
<td>Sightseeing/looking around</td>
<td>80%</td>
<td>39%</td>
</tr>
<tr>
<td>Go to the beach</td>
<td>74%</td>
<td>29%</td>
</tr>
<tr>
<td>Go to markets</td>
<td>57%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Note: Activities engaged by International visitors in Australia, not necessarily NSW.

About food visitors to NSW

Age

<table>
<thead>
<tr>
<th></th>
<th>International</th>
<th>Domestic Overnight</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>('000)</td>
<td>%</td>
</tr>
<tr>
<td>Young or midlife single</td>
<td>32%</td>
<td>20%</td>
</tr>
<tr>
<td>Young/midlife couple, no kids</td>
<td>20%</td>
<td>17%</td>
</tr>
<tr>
<td>Parent with youngest child aged under 15</td>
<td>20%</td>
<td>17%</td>
</tr>
<tr>
<td>Parent with youngest child aged 15+</td>
<td>20%</td>
<td>17%</td>
</tr>
<tr>
<td>Older working</td>
<td>20%</td>
<td>17%</td>
</tr>
<tr>
<td>Older non-working</td>
<td>20%</td>
<td>17%</td>
</tr>
</tbody>
</table>

|                      | ('000) | % | ('000) | % | ('000) | % |
|                      | 15-29 | 32% | 30-39 | 20% | 40-49 | 15% | 50-59 | 17% | 60-69 | 12% | 70+ | 4% |

|                      | ('000) | % | ('000) | % | ('000) | % |
|                      | 15-29 | 20% | 30-39 | 17% | 40-49 | 16% | 50-59 | 20% | 60-69 | 17% | 70+ | 9% |

Origin

<table>
<thead>
<tr>
<th></th>
<th>('000)</th>
<th>%</th>
<th>('000)</th>
<th>%</th>
<th>('000)</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>International</td>
<td>China</td>
<td>15%</td>
<td>United States of America</td>
<td>13%</td>
<td>New Zealand</td>
<td>8%</td>
</tr>
<tr>
<td>Domestic Overnight</td>
<td>Sydney</td>
<td>32%</td>
<td>Regional NSW</td>
<td>30%</td>
<td>Victoria</td>
<td>14%</td>
</tr>
</tbody>
</table>

Gender

<table>
<thead>
<tr>
<th></th>
<th>('000)</th>
<th>%</th>
<th>('000)</th>
<th>%</th>
<th>('000)</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>International</td>
<td>Male</td>
<td>47%</td>
<td>Female</td>
<td>53%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domestic Overnight</td>
<td>Male</td>
<td>46%</td>
<td>Female</td>
<td>54%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: Number of visitors by visitor type may not add up to total due to rounding; percentages may not add up to 100% due to rounding; n/p indicates data not publishable.
A Taste of NSW - Food Tourism

Year ended December 2019

Source: National and International Visitor Surveys, Tourism Research Australia.

Icons sourced from www.easil.ly and www.flaticon.com

About their trip to NSW

Purpose of visit

Note: Visitors may visit for more than one purpose; VFR indicates Visiting Friends and/or Relatives; some data are not publishable.

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Visitors</th>
<th>Nights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>60%</td>
<td>53%</td>
</tr>
<tr>
<td>VFR</td>
<td>37%</td>
<td>30%</td>
</tr>
<tr>
<td>Business</td>
<td>12%</td>
<td>27%</td>
</tr>
<tr>
<td>Education</td>
<td>32%</td>
<td>13%</td>
</tr>
<tr>
<td>Employment</td>
<td>3%</td>
<td>12%</td>
</tr>
</tbody>
</table>

International

Travel party

- Traveling alone: 50%
- Adult couple: 22%
- Family group - parents and children: 14%
- Friends and/or relatives travelling together: 10%
- Business associates travelling together with or without spouses: 3%

Domestic Overnight

Traveling alone: 25%

Top regions visited

<table>
<thead>
<tr>
<th>Region</th>
<th>International</th>
<th>Domestic Overnight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sydney</td>
<td>95%</td>
<td>38%</td>
</tr>
<tr>
<td>Regional NSW</td>
<td>20%</td>
<td>25%</td>
</tr>
<tr>
<td>North Coast NSW</td>
<td>8%</td>
<td>19%</td>
</tr>
<tr>
<td>Hunter</td>
<td>5%</td>
<td>13%</td>
</tr>
<tr>
<td>South Coast</td>
<td>5%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Source of destination information

<table>
<thead>
<tr>
<th>Source</th>
<th>International</th>
<th>Domestic Overnight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet search (in general or Google)</td>
<td>56%</td>
<td>41%</td>
</tr>
<tr>
<td>Recommendation from friends/relatives</td>
<td>15%</td>
<td>46%</td>
</tr>
<tr>
<td>Talked to locals for advice</td>
<td>22%</td>
<td>4%</td>
</tr>
<tr>
<td>Online travel sites</td>
<td>21%</td>
<td>4%</td>
</tr>
<tr>
<td>Travel book, guide, brochure (not online)</td>
<td>17%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Package and Group tours

<table>
<thead>
<tr>
<th>Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Package tour</td>
<td>11%</td>
</tr>
<tr>
<td>Group tour</td>
<td>6%</td>
</tr>
</tbody>
</table>

FIT# international visitor

First visit to Australia: 45%

First vs return visitor

Return visit to Australia: 55%

Note: Number of visitors by visitor type may not add up to total due to rounding; percentages may not add up to 100% due to rounding; n/p indicates data not publishable.