Are we there yet?

The current and future value of tourism to
New South Wales

Discovery series

Images coutesy of: Front cover: Getty Images/@leelakajonkij **Page 2:** Tourism Australia/Andrew Smith

About the NRMA

Better road and transport infrastructure has been a core focus of the NRMA since 1920 when our founders lobbied for improvements to the condition of Parramatta Road in Sydney. Independent advocacy was the foundation activity of the organisation and remains critical to who we are as we approach our first centenary.

From humble beginnings, the NRMA has grown to one of the largest tourism and travel companies in Australia, representing over 2.6 million Australians. As our business has grown and diversified, so too has our national footprint and customer base, providing motoring, mobility and tourism services to 4.9 million customers across the country.

Today, the NRMA works with policy makers and industry leaders to advocate for increased investment in transport solutions to make mobility safer and easier, provide access to affordable travel options and experiences, and ensure communities remain connected to business and employment opportunities.
The NRMA is passionate about facilitating tourism and travel across Australia, recognising the vital role travel plays in how Australians connect and recharge, and discover the country.

By working together with all levels of government to deliver integrated tourism and travel options we can give the community a real choice about how they get around and explore the country. The NRMA believes that integrated transport networks, high-quality public transport and improved visitor facilities are essential to solve the challenge of growing congestion and provide for the future growth of our communities.

Discovery series

The NRMA is passionate about travel. We aim to inspire people to connect, explore and discover this great country through quality tourism and transport services.

As the backbone of many regional communities and an employer of over half a million Australians, we need to ensure the tourism industry continues to grow. The NRMA will champion investment in transport and visitor infrastructure, partnerships to profile our regions and technology to link visitors with the most iconic and best kept secrets this country has to offer.

Introduction

New South Wales has a strong and vibrant visitor economy. From the pristine mountain tops of the snowy mountains to the iconic beaches on the north and south coast, NSW has a lot to offer visitors and locals alike.

Tourism contributes $34.2 billion to Gross State Product. It employs 171,100 people and supports 95,000 tourism businesses in regional and metropolitan NSW.

The NRMA is committed to the tourism industry and the communities it supports. The NRMA's NSW *Are We There Yet?* paper highlights the importance of tourism to NSW and its regions, trends in visitation and expenditure, and the value of drive tourism and caravan and camping to many of the state's iconic regional destinations.

NSW welcomed 90.7 million visitors in 2016-17, who spent $33.2 billion in local communities. The state has experienced strong growth in visitor expenditure to 2016-17, with an average annual growth rate of 6 per cent since 2011-12.

Forty six per cent of total visitor expenditure occurs in regional NSW, with 70 per cent of total visitor expenditure generated by domestic visitors. This highlights the importance of fostering Australia's love affair with the great Aussie holiday.

NSWs' tourism regions have performed strongly over the five years to 2016-17. The Blue Mountains and South Coast experienced an average annual increase of 13 per cent in international visitation to 112,000 and 174,000 respectively. Outback NSW saw the largest average annual increase in domestic overnight visitation of 9 per cent to 490,000 visitors to 2016-17. The Snowy Mountains also saw the largest average increase in international expenditure at 36 per cent per annum to $25 million.

Encouraging visitors to discover our regions and stay longer is a core focus of the NRMA. It's important to note that 83 per cent of visitors to NSW undertake travel by car, with this number increasing to 93 per cent of visitors to regional NSW.

The Blue Mountains experienced the largest average annual growth in international self-drive visitors of 14 per cent to 72,000 visitors, while both the Riverina and Snowy Mountains saw the largest growth in international visitor nights to 2016-17. Outback NSW saw the largest average annual growth in domestic overnight visitation, nights and expenditure over the same period.

Further, caravan and camping generated $1.4 billion in visitor expenditure, of which 92 per cent occurs in regional NSW.

The industry has achieved much through the Visitor Economy Taskforce and the mid-term review of the Visitor Economy Industry Action Plan provides the perfect opportunity to discuss the states progress and future priorities to support the growth of this sector beyond 2020.

The NRMA believes with the right level of investment, planning and industry partnerships, that visitor nights could increase to 280 million by 2026-27, contributing $40.1 billion in overnight visitor expenditure to the NSW economy.

Of this visitor expenditure $15 billion could be spent in regional NSW. With the industry approaching the cusp of the 2020 Tourism Industry potential target, now is the time to review our performance and plan for the future.

New South Wales tourism regions

Headlines figures

171,100
people employed in the sector

59 million visitors to
regional NSW –
65 per cent of total visitation

$33.2
billion in visitor expenditure

Domestic overnight expenditure totalled
$17.2
billion, representing 52 per cent of total spend

International visitor expenditure totalled
$10.1 **billion in 2016-17 - an average annual growth rate of 13 per cent**

90.7 million visitors – 96 per cent are domestic

Industry potential

Visitor nights could grow to
280
million by 2026-27 – 110 million in regional NSW

$15 billion in overnight visitor expenditure could be spent directly in regional NSW

Direct overnight
visitor expenditure
could increase to $40.1 billion in 2026-27

Self-drive visitor nights could increase to
152
million by 2026-27

Caravan and camping

Visitors who stayed in a caravan or camping ground spent
$1.4 billion in 2016-17

92% **of caravan and camping expenditure occurs in regional NSW**

In the regions

The North Coast of NSW received the largest number of international visitors to regional NSW at 345,000, with an average annual growth rate of

9%

The North Coast and Hunter received the largest number of day trip visitors at

7 million and 6.7 million

respectively

The Blue Mountains has seen an average annual increase in international visitor nights of 20 per cent to

684,000

in 2016-17

The Blue Mountains

and South Coast experienced the largest average annual increase of 13 per cent in international visitation to 112,000 and 174,000 respectively

Outback NSW saw the largest average annual increase in domestic visitor nights of 15 per cent to

1.9 million

The Snowy Mountains also saw the largest average increase in international expenditure at 36 per cent per annum to $25 million.

Caravan and camping

The North Coast and South Coast remain **the most popular destinations for caravan and camping visitors**, with 61% of all caravan and camping visitors visiting these regions.

Self-drive

75 million visitors

took a self-drive trip in 2016-17

98% of self-drive trips were by domestic visitors.

Self-drive trips by international visitors have grown on average 7 per cent each year compared to 5 per cent for domestic overnight visitors.

Self-drive tourism expenditure totalled

$18.6 billion in 2016-17

68 per cent of self-drive tourism expenditure occurs in regional NSW

The Blue Mountains and Outback NSW have seen the largest average annual growth in

self-drive trips

The North Coast and South Coast combined represent

42%

of regional self-drive expenditure

Economic contribution of tourism

		Total tourism visitation				Total tourism nights		
		Visitors (000)				Nights (000)		
Stopover region	**Financial year**	**Int'l**	**Dom. overnight**	**Dom. daytrips**	**Total**	**Int'l**	**Dom. overnight**	**Total**
Sydney	2011/12	2,568	7,697	19,431	29,696	55,812	22,044	77,856
	2016/17	3,747	9,456	19,685	32,888	77,707	26,215	103,922
	Av. Annual change	9%	5%	0%	2%	8%	4%	7%
Blue Mountains	2011/12	67	723	2,222	3,012	345	1,672	2,017
	2016/17	112	962	2,926	4,000	684	2,266	2,950
	Av. Annual change	13%	7%	6%	7%	20%	7%	9%
Capital Country	2011/12	22	1,064	2,626	3,712	351	2,447	2,798
	2016/17	35	1,181	2,762	3,978	582	2,721	3,303
	Av. Annual change	11%	2%	1%	1%	13%	2%	4%
Central Coast	2011/12	38	1,135	3,254	4,427	701	3,363	4,064
	2016/17	50	1,385	3,402	4,837	912	3,879	4,791
	Av. Annual change	6%	4%	1%	2%	6%	3%	4%
Central NSW	2011/12	40	1,952	2,535	4,528	885	5,465	6,350
	2016/17	38	2,332	3,088	5,458	440	6,358	6,798
	Av. Annual change	-1%	4%	4%	4%	-10%	3%	1%
Hunter	2011/12	128	2,688	6,198	9,014	2,570	7,638	10,209
	2016/17	186	3,346	6,658	10,191	3,039	8,648	11,687
	Av. Annual change	9%	5%	1%	3%	4%	3%	3%
New England North West	2011/12	38	1,325	1,860	3,223	646	3,783	4,430
	2016/17	41	1,548	1,722	3,311	1,061	4,190	5,251
	Av. Annual change	2%	3%	-1%	1%	13%	2%	4%
North Coast NSW	2011/12	241	4,084	6,318	10,643	2,287	16,992	19,280
	2016/17	345	5,099	7,036	12,480	3,645	19,906	23,551
	Av. Annual change	9%	5%	2%	3%	12%	3%	4%
Outback NSW	2011/12	13	332	149*	494	229	1,060	1,290
	2016/17	12	490	219*	721	90	1,857	1,947
	Av. Annual change	-1%	9%	9%	9%	-12%	15%	10%
Riverina	2011/12	20	837	1,473	2,330	564	1,898	2,463
	2016/17	29	1,033	1,496	2,558	847	2,847	3,694
	Av. Annual change	9%	5%	0%	2%	10%	10%	10%
Snowy Mountains	2011/12	16	708	650	1,374	244	3,043	3,287
	2016/17	18	883	608	1,509	431	3,091	3,522
	Av. Annual change	3%	5%	-1%	2%	15%	0%	1%
South Coast	2011/12	105	3,089	6,003	9,196	1,817	10,727	12,544
	2016/17	174	3,735	5,911	9,820	2,752	11,419	14,172
	Av. Annual change	13%	4%	0%	1%	10%	1%	3%
The Murray	2011/12	21	891	1,109	2,020	290	2,565	2,855
	2016/17	27	1,108	1,194	2,329	324	2,898	3,222
	Av. Annual change	6%	5%	2%	3%	2%	3%	3%
Regional NSW	2011/12	570	17,178	34,397	52,145	10,931	60,655	71,585
	2016/17	812	21,179	37,022	59,013	14,806	70,081	84,887
	Av. Annual change	9%	5%	2%	3%	7%	3%	4%
NSW	**2011/12**	**2,753**	**24,251**	**53,828**	**80,832**	**66,743**	**82,698**	**149,441**
	2016/17	**4,008**	**29,981**	**56,707**	**90,696**	**92,512**	**96,296**	**188,808**
	Av. Annual change	**9%**	**5%**	**1%**	**2%**	**8%**	**3%**	**5%**

Source: Tourism Research Australia

Total tourism expenditure

		Regional expenditure ($M)				Employment
Stopover region	**Financial year**	**Int'l**	**Dom. overnight**	**Dom. daytrips**	**Total**	**Total**
Sydney	2011/12	5,458	5,488	2,172	13,118	80,700
	2016/17	9,034	6,684	2,156	17,874	
	Av. Annual change	13%	4%	0%	7%	
Blue Mountains	2011/12	33	245	215	493	3,600
	2016/17	66	386	214	666	
	Av. Annual change	20%	12%	0%	7%	
Capital Country	2011/12	21	338	238	597	3,700
	2016/17	33	347	264	644	
	Av. Annual change	11%	1%	2%	2%	
Central Coast	2011/12	29	371	229	629	6,200
	2016/17	64	511	256	831	
	Av. Annual change	24%	8%	2%	6%	
Central NSW	2011/12	39	797	271	1,108	7,400
	2016/17	25	900	378	1,302	
	Av. Annual change	-7%	3%	8%	4%	
Hunter	2011/12	173	1,231	615	2,019	14,600
	2016/17	221	1,563	736	2,520	
	Av. Annual change	6%	5%	4%	5%	
New England North West	2011/12	31	427	276	734	4,800
	2016/17	66	532	195	793	
	Av. Annual change	23%	5%	-6%	2%	
North Coast NSW	2011/12	146	2,330	670	3,146	21,700
	2016/17	226	2,810	666	3,702	
	Av. Annual change	11%	4%	0%	4%	
Outback NSW	2011/12	11	162	np*	186	1,900
	2016/17	6	343	np*	369	
	Av. Annual change	-9%	22%	np	20%	
Riverina	2011/12	20	355	180	555	3,700
	2016/17	42	367	252	661	
	Av. Annual change	22%	1%	8%	4%	
Snowy Mountains	2011/12	9	385	78	472	4,700
	2016/17	25	577	49	651	
	Av. Annual change	36%	10%	-7%	8%	
South Coast	2011/12	133	1,312	504	1,949	14,800
	2016/17	272	1,774	595	2,641	
	Av. Annual change	21%	7%	4%	7%	
The Murray	2011/12	20	319	125	463	3,100
	2016/17	19	364	141	524	
	Av. Annual change	-1%	3%	3%	3%	
Regional NSW	2011/12	665	8,272	3,415	12,351	90,400
	2016/17	1,065	10,474	3,766	15,304	
	Av. Annual change	12%	5%	2%	5%	
NSW	**2011/12**	**6,123**	**13,760**	**5,587**	**25,469**	**171,100**
	2016/17	**10,099**	**17,158**	**5,922**	**33,178**	
	Av. Annual change	**13%**	**5%**	**1%**	**6%**	

*one or more of the estimates is subject to high sampling variability. In these instances, the estimates and growth rates reported should be treated with caution.

Self-drive tourism

		Drive tourism				Drive tourism nights		
		Visitors (000)				Nights (000)		
Stopover region	**Financial year**	**Int'l**	**Dom. overnight**	**Dom. daytrips**	**Total**	**Int'l**	**Dom. overnight**	**Total**
Sydney	2011/12	798	4,023	15,377	20,198	21,446	9,967	31,413
	2016/17	1,087	4,849	15,556	21,493	29,421	12,581	42,001
	Av. Annual change	7%	4%	0%	1%	7%	5%	7%
Blue Mountains	2011/12	42	594	2,064	2,701	195	1,396	1,591
	2016/17	72	875	2,584	3,531	274	2,013	2,287
	Av. Annual change	14%	9%	5%	6%	8%	9%	9%
Capital Country	2011/12	16	947	2,553	3,516	188	2,040	2,229
	2016/17	25	1,067	2,612	3,703	210	2,387	2,597
	Av. Annual change	11%	3%	0%	1%	2%	3%	3%
Central Coast	2011/12	26	1,044	3,028	4,098	426	3,086	3,512
	2016/17	33	1,224	3,210	4,467	413	3,277	3,690
	Av. Annual change	5%	3%	1%	2%	-1%	1%	1%
Central NSW	2011/12	25	1,762	2,487	4,273	307	4,651	4,958
	2016/17	26	2,098	3,029	5,153	191	5,266	5,456
	Av. Annual change	1%	4%	4%	4%	-8%	3%	2%
Hunter	2011/12	85	2,386	5,898	8,369	903	6,459	7,362
	2016/17	123	2,919	6,391	9,432	1,561	7,138	8,698
	Av. Annual change	9%	4%	2%	3%	15%	2%	4%
New England North West	2011/12	22	1,209	1,810	3,041	229	3,374	3,603
	2016/17	27	1,352	1,695	3,074	553	3,561	4,114
	Av. Annual change	4%	2%	-1%	0%	28%	1%	3%
North Coast NSW	2011/12	135	3,591	6,110	9,836	971	14,516	15,487
	2016/17	213	4,451	6,851	11,515	1,944	16,991	18,935
	Av. Annual change	12%	5%	2%	3%	20%	3%	4%
Outback NSW	2011/12	9	270	135*	414	43	818	861
	2016/17	9	403	204*	617	53	1,540	1,592
	Av. Annual change	2%	10%	10%	10%	5%	18%	17%
Riverina	2011/12	12	750	1,427	2,189	126	1,625	1,752
	2016/17	18	911	1,450	2,379	339	2,386	2,725
	Av. Annual change	10%	4%	0%	2%	34%	9%	11%
Snowy Mountains	2011/12	12	639	641	1,292	116	2,141	2,257
	2016/17	15	794	600	1,409	387	2,550	2,937
	Av. Annual change	6%	5%	-1%	2%	47%	4%	6%
South Coast	2011/12	84	2,877	5,631	8,592	1,122	9,829	10,951
	2016/17	126	3,459	5,560	9,145	1,256	10,511	11,767
	Av. Annual change	10%	4%	0%	1%	2%	1%	1%
The Murray	2011/12	16	771	1,069	1,856	168	1,968	2,136
	2016/17	20	983	1,156	2,159	124	2,482	2,606
	Av. Annual change	5%	5%	2%	3%	-5%	5%	4%
Regional NSW	2011/12	345	15,359	32,854	48,558	4,795	51,903	56,698
	2016/17	498	18,826	35,343	54,667	7,304	60,101	67,405
	Av. Annual change	9%	5%	2%	3%	10%	3%	4%
NSW	**2011/12**	**984**	**18,943**	**48,231**	**68,158**	**26,241**	**61,871**	**88,112**
	2016/17	**1,340**	**23,213**	**50,900**	**75,453**	**36,725**	**72,681**	**109,406**
	Av. Annual change	**7%**	**5%**	**1%**	**2%**	**8%**	**3%**	**5%**

Source: Tourism Research Australia

Drive tourism expenditure

		Regional Expenditure ($m)			
Stopover region	**Financial year**	**Int'l**	**Dom. overnight**	**Dom. daytrips**	**Total**
Sydney	2011/12	1,567	1,611	1,592	4,770
	2016/17	2,384	2,041	1,557	5,983
	Av. Annual change	10%	5%	0%	5%
Blue Mountains	2011/12	22	195	207	424
	2016/17	30	355	198	582
	Av. Annual change	7%	16%	-1%	7%
Capital Country	2011/12	15	268	235	519
	2016/17	12	294	256	562
	Av. Annual change	-4%	2%	2%	2%
Central Coast	2011/12	18	314	220	552
	2016/17	22	438	246	706
	Av. Annual change	4%	8%	2%	6%
Central NSW	2011/12	15	641	260	916
	2016/17	12	711	362	1,085
	Av. Annual change	-4%	2%	8%	4%
Hunter	2011/12	58	951	580	1,588
	2016/17	96	1,212	707	2,015
	Av. Annual change	13%	5%	4%	5%
New England North West	2011/12	12	317	269	598
	2016/17	38	374	194	607
	Av. Annual change	43%	4%	-6%	0%
North Coast NSW	2011/12	65	1,745	644	2,454
	2016/17	119	2,193	649	2,961
	Av. Annual change	17%	5%	0%	4%
Outback NSW	2011/12	3	108	np*	122
	2016/17	4	261	np*	284
	Av. Annual change	7%	28%	np	27%
Riverina	2011/12	5	274	173	453
	2016/17	11	273	241	524
	Av. Annual change	24%	0%	8%	3%
Snowy Mountains	2011/12	5	323	78	407
	2016/17	20	512	48	580
	Av. Annual change	60%	12%	-8%	9%
South Coast	2011/12	77	1,137	478	1,692
	2016/17	125	1,591	576	2,292
	Av. Annual change	12%	8%	4%	7%
The Murray	2011/12	12	248	123	383
	2016/17	7	280	140	426
	Av. Annual change	-8%	3%	3%	2%
Regional NSW	2011/12	307	6,521	3,278	10,108
	2016/17	496	8,494	3,636	12,624
	Av. Annual change	12%	6%	2%	5%
NSW	**2011/12**	**1,874**	**8,132**	**4,870**	**14,878**
	2016/17	**2,880**	**10,535**	**5,193**	**18,607**
	Av. Annual change	**11%**	**6%**	**1%**	**5%**

*one or more of the estimates is subject to high sampling variability. In these instances, the estimates and growth rates reported should be treated with caution.

Caravan and camping

Caravan and camping visitation							
		Visitors (000)			Nights (000)		
Stopover region	**Financial year**	**Int'l**	**Dom. overnight**	**Total**	**Int'l**	**Dom. overnight**	**Total**
Sydney	2011/12	15	83*	98	120	343*	463
	2016/17	25	127	152	96	582	678
	Av. Annual change	13%	11%	11%	-4%	14%	9%
Blue Mountains	2011/12	11	38*	49	27	112*	139
	2016/17	17	32*	48	38	120*	158
	Av. Annual change	10%	-3%	0%	8%	2%	3%
Capital Country	2011/12	2*	62*	63	21*	165*	186
	2016/17	4*	78*	82	7*	146*	153
	Av. Annual change	26%	5%	6%	-13%	-2%	-4%
Central Coast	2011/12	2*	69*	71	3*	259*	262
	2016/17	4*	105	109	8*	372	379
	Av. Annual change	29%	10%	11%	25%	9%	9%
Central NSW	2011/12	5*	152	156	21*	456	477
	2016/17	5*	184	189	31*	502	533
	Av. Annual change	2%	4%	4%	9%	2%	2%
Hunter	2011/12	12	195	206	26	629	655
	2016/17	19	215	234	51	646	697
	Av. Annual change	12%	2%	3%	19%	1%	1%
New England North West	2011/12	6	140	146	34	576	610
	2016/17	4*	150	153	39*	451	490
	Av. Annual change	-7%	1%	1%	3%	-4%	-4%
North Coast NSW	2011/12	36	675	711	157	3,876	4,034
	2016/17	56	782	837	291	4,055	4,346
	Av. Annual change	11%	3%	4%	17%	1%	2%
Outback NSW	2011/12	3*	63*	66	12*	207*	219
	2016/17	3*	102	105	15*	398	412
	Av. Annual change	5%	12%	12%	4%	18%	18%
Riverina	2011/12	3*	72	74	14*	182	196
	2016/17	3*	97	100	13*	206	219
	Av. Annual change	5%	7%	7%	-2%	3%	2%
Snowy Mountains	2011/12	3*	73*	75	11*	883*	894
	2016/17	2*	98*	100	6*	391*	397
	Av. Annual change	-1%	7%	7%	-8%	-11%	-11%
South Coast	2011/12	18	530	548	52	2,325	2,377
	2016/17	25	641	666	74	2,295	2,369
	Av. Annual change	8%	4%	4%	8%	0%	0%
The Murray	2011/12	3*	157	160	4*	484	488
	2016/17	3*	122	125	7*	390	397
	Av. Annual change	-1%	-5%	-4%	13%	-4%	-4%
Regional NSW	2011/12	62	1,974	2,036	384	10,154	10,538
	2016/17	90	2,259	2,349	580	9,972	10,552
	Av. Annual change	9%	3%	3%	10%	0%	0%
NSW	**2011/12**	**65**	**2,050**	**2,115**	**504**	**10,497**	**11,001**
	2016/17	**96**	**2,359**	**2,455**	**675**	**10,554**	**11,230**
	Av. Annual change	**9%**	**3%**	**3%**	**7%**	**0%**	**0%**

Source: Tourism Research Australia

Caravan and camping expenditure				
		Regional Expenditure ($m)		
Stopover region	**Financial year**	**Int'l**	**Dom. Overnight**	**Total**
Sydney	2011/12	10	59*	69
	2016/17	11	102	113
	Av. Annual change	2%	15%	13%
Blue Mountains	2011/12	4	14*	18
	2016/17	4	18*	22
	Av. Annual change	0%	6%	4%
Capital Country	2011/12	1	18*	19
	2016/17	1	16*	17
	Av. Annual change	0%	-2%	-2%
Central Coast	2011/12	0*	30*	30
	2016/17	0*	35	35
	Av. Annual change	np	3%	3%
Central NSW	2011/12	2*	58	60
	2016/17	2*	47	49
	Av. Annual change	0%	-4%	-4%
Hunter	2011/12	2	77	79
	2016/17	3	92	95
	Av. Annual change	10%	4%	4%
New England North West	2011/12	2	45	47
	2016/17	2*	42	44
	Av. Annual change	0%	-1%	-1%
North Coast NSW	2011/12	10	389	399
	2016/17	16	471	487
	Av. Annual change	12%	4%	4%
Outback NSW	2011/12	1*	32*	33
	2016/17	1*	51	52
	Av. Annual change	0%	12%	12%
Riverina	2011/12	1*	21	22
	2016/17	1*	24	25
	Av. Annual change	0%	3%	3%
Snowy Mountains	2011/12	0*	23*	23
	2016/17	1*	60*	61
	Av. Annual change	np	32%	33%
South Coast	2011/12	5	247	252
	2016/17	8	370	378
	Av. Annual change	12%	10%	10%
The Murray	2011/12	1*	62	63
	2016/17	1*	41	42
	Av. Annual change	0%	-7%	-7%
Regional NSW	2011/12	28	1,016	1,044
	2016/17	39	1,267	1,306
	Av. Annual change	8%	5%	5%
NSW	**2011/12**	**38**	**1,075**	**1,113**
	2016/17	**50**	**1,369**	**1,419**
	Av. Annual change	**6%**	**5%**	**5%**

*one or more of the estimates is subject to high sampling variability. In these instances, the estimates and growth rates reported should be treated with caution.

2026-27 projections

Visitor nights and self-drive visitation

NSW	All tourism nights (000)				
	Sydney		Regional NSW		
	International	Domestic overnight	International	Domestic overnight	Total
2017-18	83,000	26,949	15,783	71,832	197,565
2018-19	88,472	27,750	16,693	73,636	206,551
2019-20	93,923	28,464	17,572	75,200	215,159
2020-21	99,318	29,165	18,411	76,725	223,619
2021-22	104,971	29,865	19,301	78,213	232,351
2022-23	110,796	30,564	20,212	79,664	241,236
2023-24	116,943	31,268	21,155	81,116	250,482
2024-25	123,374	31,977	22,141	82,567	260,059
2025-26	130,159	32,692	23,165	84,019	270,034
2026-27	137,331	33,411	24,232	85,470	280,443

NSW	Self drive tourism nights (000)				
	Sydney		Regional NSW		
	International	Domestic overnight	International	Domestic overnight	Total
2017-18	31,805	12,479	7,347	61,443	113,073
2018-19	33,901	12,849	7,771	62,985	117,506
2019-20	35,990	13,180	8,180	64,323	121,673
2020-21	38,057	13,505	8,570	65,627	125,760
2021-22	40,224	13,829	8,984	66,901	129,938
2022-23	42,456	14,152	9,409	68,141	134,158
2023-24	44,811	14,478	9,847	69,383	138,520
2024-25	47,275	14,807	10,306	70,625	143,013
2025-26	49,875	15,138	10,783	71,866	147,662
2026-27	52,624	15,471	11,280	73,107	152,481

2026-27 projections

Expenditure – capital city and regional NSW

NSW	Overnight visitor expenditure ($m)		
	Sydney	Regional NSW	Total
2017-18	16,190	11,942	28,131
2018-19	17,113	12,312	29,425
2019-20	18,021	12,645	30,666
2020-21	18,919	12,967	31,885
2021-22	19,854	13,291	33,145
2022-23	20,815	13,613	34,428
2023-24	21,823	13,939	35,763
2024-25	22,875	14,272	37,146
2025-26	23,979	14,609	38,588
2026-27	25,141	14,952	40,093

Data notes:

Source

- Tourism Research Australia (TRA).

Employment

- Estimates for each tourism region have been sourced from TRA's 2016-17 Regional Tourism Satellite Accounts.

Visitor Estimates

- Components may not add to totals as visitors may visit more than one tourism region on a trip.

Expenditure Estimates

- Expenditure excludes all motor vehicle, capital and major equipment purchases and for international visitors any pre-purchased international airfares and 70 per cent of pre-purchased packages assumed to be spent outside Australia.
- For self-drive, expenditure for each tourism region refers to total expenditure in that region by visitors who arrived by self-drive vehicle.
- For caravan and camping, expenditure for each tourism region refers to total expenditure in that region by visitors who stayed in a commercial caravan park or camping ground during their visit.

Tourism Region Estimates

- Tourism regions estimates for nearly all metrics are based on the region boundaries which applied in 2017. The caravan and camping expenditure estimates are based on 2018 region boundaries. The differences between 2017 and 2018 region boundaries are negligible.
- Where a tourism region is asterisked (*) one or more of the estimates is subject to high sampling variability. In these instances, the estimates and growth rates reported should be treated with caution.
- The Gold Coast tourism region is included in Regional Queensland estimates.

Inclusions and Exclusions

- Regional, State and National totals include relevant estimates from tourism regions where data has been confidentialised and not published (i.e. np cells).
- Regional, State and National totals exclude stopovers by visitors to unspecified, offshore and/or transit locations.

Projections

- Visitor overnight forecasts derived from TRA data. The NRMA has used these forecasts as the basis of its own independent projections.
- Self-drive visits and visitor nights have been calculated using a five-year average of the percentage self-drive represents of all tourism.
- Expenditure forecasts have been calculated using visitor nights as a pro rata proxy.
- Care should be used when using forecasted numbers. Domestic and international geopolitical and economic events outside the scope of this report can impact both domestic and international visitor numbers, travel patterns and expenditure.

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