



Destination
Riverina Murray NSW

The Value of Tourism to Riverina Murray 2022



**Every minute of every day, Tourism
delivers \$3,833 of domestic visitor spend
into Riverina Murray**

**That is \$5.5 million per day!
A value that has grown by 71.7%
in the last year alone.**

*International visitation to the Riverina Murray Destination Network (DN) for the year ended (YE)
December 2022 cannot be shown in this booklet due to small sample size
(which means that data is not statistically reliable).*

**This year the number of domestic visitors to the Riverina Murray DN is 5.7 million or 6 per cent below
the pre-Covid period (year 2019), but 37 per cent above the 2021 visitation level.**

Tourism delivers **5.6%** of our jobs, supports **3,414** businesses and directly delivers **2.3%** of our region's Gross Value Add (GVA) which has declined every year since 2010/11 at an average **0.7%** pa.

NSW's Visitor Economy

In 2020-2021, NSW's visitor economy (3.1% share of state GVA) was worth more than Agriculture, Forestry & Fishing and Mining (1.8% share of state GVA). It scored just below Education & Training (5.3% share of state GVA). The total filled jobs were about 4.0% of the state's total filled jobs and 66.6% of the 10-year (2010-2020) average filled jobs in the visitor economy.

In 2021-2022, NSW's visitor economy (2.7% share of state GVA) is worth more than Agriculture, Forestry & Fishing (2.6% share of state GVA). It scored just below Mining (4.5% share of state GVA). The total filled jobs were about 3.8% of the state's total filled jobs and 66.7% of the 10-year (2011-2021) average filled jobs in the visitor economy.

Source: TRA, STSA, 2020-21 & 2021-22.

NSW's TOURISM INVESTMENT

NSW held nearly 32% of 2021-22 Tourism Investment Pipeline being the largest among all states and territories, with 59 projects valued at \$14.1bn.

1. Aviation (\$5.4bn)
2. Accommodation (\$4.7bn)
3. Arts, recreation & business services (\$4.0bn)
4. Regional investment (\$1.1bn)

Source: TRA, Tourism Investment Monitor 2021-22.

REGIONAL EMPLOYMENT DUE TO TOURISM

Tourism's DIRECT Contribution to Employment

FULL TIME 4,036
PART TIME 4,249

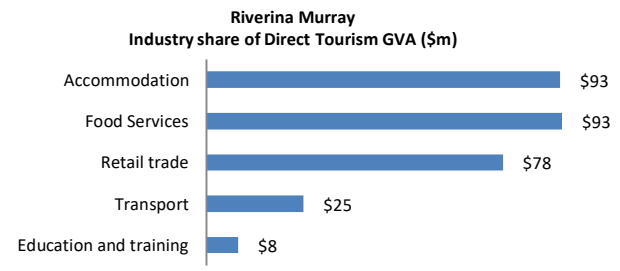


Supporting our local economy, Tourism supplies 5.6% of the region's employment including 8,285 persons who are directly employed and a further 2,149 who are indirectly employed.

There are 3,414 tourism related businesses in Riverina Murray DN, around 9% of all Regional NSW Tourism businesses.

Source: TRA, STSA, 2020-21; TRA, Tourism Businesses in Australia, June 2022.

REGIONAL BUSINESSES RELYING ON TOURISM



Economically, tourism businesses directly deliver \$361 million (2.3%) of the region's GVA – over 80% of which is delivered by our Accommodation, Food Service, Retail, Transport and Education establishments.

Source: TRA, STSA, 2020-21.

TOURISM SUPPLY

Establishments with 10 rooms or more

Year ended	SUPPLY			DEMAND		REVENUE		
	Establishments	Rooms	Room nights available (000)	Room nights occupied (000)	Room occupancy rate	Takings from accommodation	Average daily rate	Revenue per available room
	no.	no.	no.	no.	%	\$ millions	\$	\$
Riverina Murray	206	6,504	2,447	1,667	68.1%	266	159	109
%Ch on 2021	-1.9%	-3.4	-0.4%	36.2%	18.3 ppts*	56.6%	15.0%	57.2%

*percentage point change

Source: STR Tourist Accommodation, 2022

Riverina Murray DN has 206 accommodation establishments with a room stock of over 6,504 (for establishments with ten rooms or more).



Domestic direct inbound seats and flights have increased in 2022 with a total of 9,114 flights (+100.5%yoy) delivering 422,766 seats (+98.1% yoy).

Source: Official Airline Guide OAG

Notes:

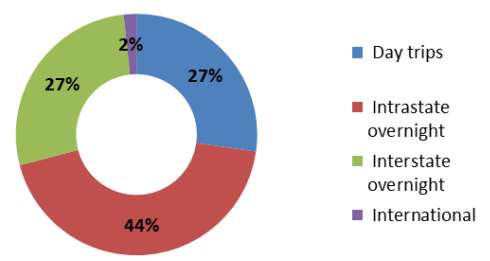
- Visitor Economy includes money spent directly in the tourism industry and other related expenditure by the flow-on effect of the tourism industry.
- Gross Value Added (GVA), Tourism Jobs and Businesses data p.a. are only available by tourism regions (TR) in official statistics. For each DN, GVA was estimated based on its visitor expenditure share of the TR's 2016-19 average, Tourism Jobs and Businesses were estimated based on visitor number share of the TR's 2016-19 average.
- Tourism Investment Pipeline represents all known major tourism-related projects in fixed assets having an est. financial value of \$20m or more in 3 main tourism segments (aviation; arts, recreation & business services; accommodation).

Riverina Murray DN is the **2nd ranked** DN in NSW for spend per visitor of daytrip visitors!

ECONOMIC VALUE OF TOURISM

In terms of what is consumed by Tourism, Riverina Murray DN represents about 5% of the state's Total Tourism Consumption. This is mostly delivered by Intrastate tourism to the Region. Riverina Murray has a substantial Domestic tourism market.

Riverina Murray \$1.3 b* Share of DN consumption



*FY 2020-2021 tourism consumption data

Riverina Murray DN total domestic visitation has grown 57% since 2016 in terms of visitor expenditure value.

RIVERINA MURRAY DN TOTAL DOMESTIC

5,708

VISITORS
(000)



7,223

NIGHTS
(000)



\$2,015

EXPENDITURE
(\$M)

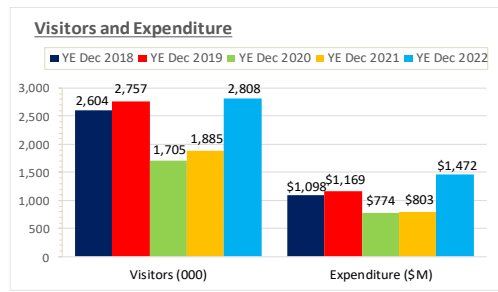
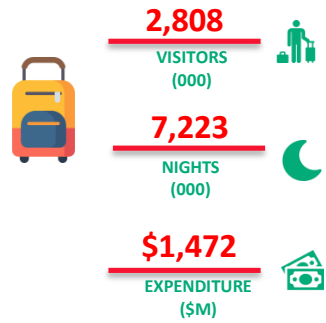


TRAVEL TYPE

ORIGIN

Domestic Overnight

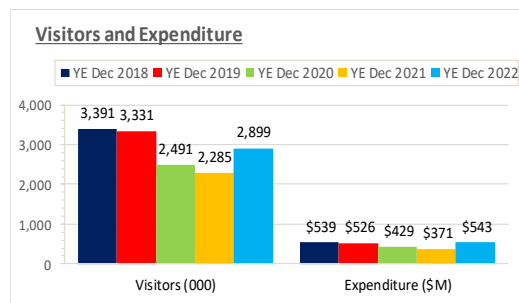
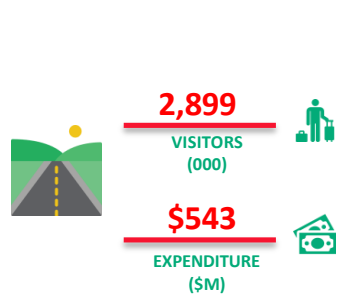
Source: Tourism Research Australia, National Visitor Survey.



Origin	Share of Visitors		Share of Expenditure	
	YE Dec 21	YE Dec 22	YE Dec 21	YE Dec 22
Regional NSW	35.5%	31.3%	33.7%	32.0%
Sydney	15.6%	16.1%	16.9%	15.6%
Total Intrastate	51.1%	47.4%	50.5%	47.7%
Victoria	38.1%	38.4%	36.5%	36.3%
Australian Capital Territory	3.8%	4.6%	3.5%	3.2%
Queensland	*	4.1%	*	6.6%
Other Interstate	4.6%	5.5%	5.8%	6.2%
Total Interstate	48.9%	52.6%	49.5%	52.3%

Domestic Daytrip

Source: Tourism Research Australia, National Visitor Survey.



Origin	Share of Visitors		Share of Expenditure	
	YE Dec 2021	YE Dec 2022	YE Dec 2021	YE Dec 2022
Intrastate	72.3%	69.9%	73.0%	81.2%
Interstate	27.7%	30.1%	27.0%	18.8%

Note:

☐ Items with * are available but not statistically reliable.

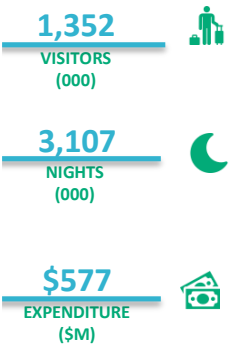
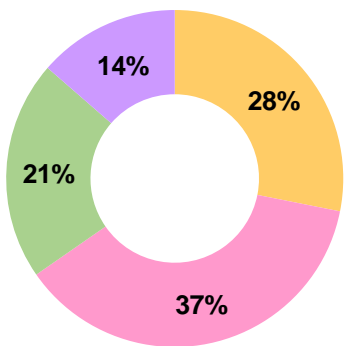
RIVERINA

MURRAY

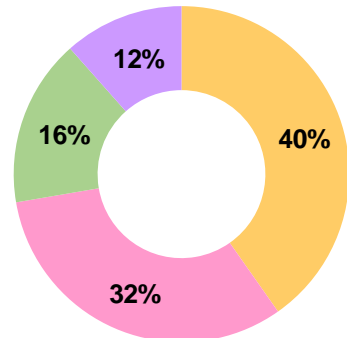


Note: Purpose of visit shares provided only when statistically reliable

TRAVEL TYPE

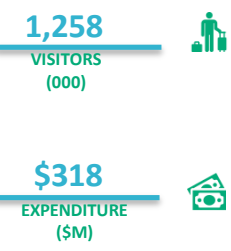
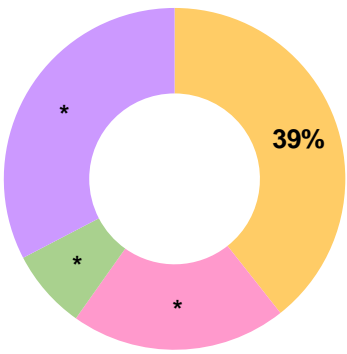


Domestic Overnight

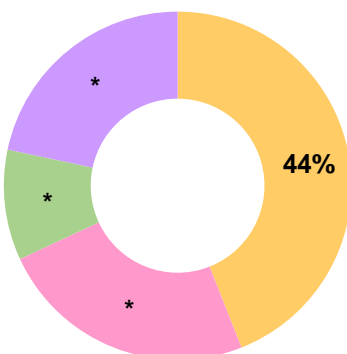


- Holiday
- Visiting friends and relatives
- Business
- Other

- Holiday
- Visiting friends and relatives
- Business
- Other



Domestic Daytrip



- Holiday
- Visiting friends and relatives
- Business
- Other

- Holiday
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- Other

Source: Tourism Research Australia, National Visitor Survey.

Note:
 □ Items with * are available but not statistically reliable.

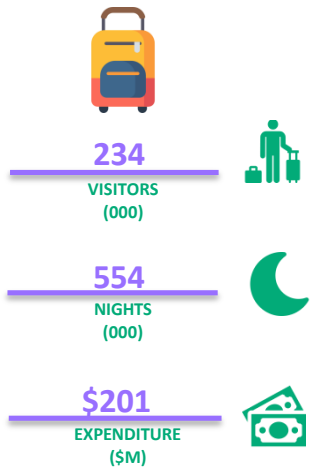
Events deliver visitors, visitor nights and visitor spend into Riverina Murray DN

In 2022, Riverina Murray DN has secured events that have delivered \$243 million worth of domestic visitor expenditure into the state.



RIVERINA MURRAY DN EVENTS DELIVERED...

Domestic Overnight



Source: Tourism Research Australia, National Visitor Survey

SAMPLE OF RIVERINA MURRAY DN EVENTS

- | | |
|---|---|
| <p>Play On The Plains</p> <p>Gears and Beers Festival</p> <p>Blood, Sweat and Beers</p> <p>Tumbarumba to Rosewood Rail Trail</p> <p>Marathon</p> <p>Southern 80</p> <p>Winter Bites Festival</p> <p>Festival of W (A Very Wagga Christmas)</p> <p>Australian Art Deco Festival Leeton</p> <p>Moama Lights</p> | <p>Winter Bites Festival</p> <p>Write Around the Murray Festival</p> <p>Spring Jam</p> <p>Deni Ute Muster</p> <p>Gears + Beers Festival</p> <p>Harden Kite Festival</p> <p>Griffith Spring Festival</p> <p>Perricoota Pop & Pour Festival</p> |
|---|---|



Photo Credit: Destination NSW

Note:
 Daytrip event visitor data in Riverina Murray DN are available but not statistically reliable.

What **experiences** drive visitors to come to your destination?

More than 75%
 of the group
 participate

50% - 75%
 of the group
 participate

25% - 50%
 of the group
 participate



Domestic
 Overnight



Domestic
 Daytrip

	Domestic Overnight	Domestic Daytrip
Bushwalking / rainforest walks	9%	*
Eat out / dine at a restaurant and/or cafe	53%	41%
Exercise, gym or swimming	4%	*
Fishing	5%	*
Go on a daytrip to another place	4%	n/a
Go shopping for pleasure	15%	25%
Pubs, clubs, discos etc	28%	*
Sightseeing/looking around	20%	*
Visit friends & relatives	31%	20%
Visit history / heritage buildings, sites or monument	5%	*
Visit museums or art galleries	5%	*
Visit national parks / state parks	7%	*

Source: Tourism Research Australia, National Visitor Survey.

Notes:

- Items with * are available but not statistically reliable
- Items with n/a means data are not available.

Is your region getting its **share** of the **Visitor/Tourism economy**?

RIVERINA MURRAY DN TOTAL DOMESTIC

5,708

VISITORS
(000)



7,223

NIGHTS
(000)



\$2,015

EXPENDITURE
(\$M)



MURRAY

TOTAL Murray	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	2,661	1,374	1,287
Share of RM %	47%	49%	44%
Expenditure (\$M)	959	777	182
Share of RM %	48%	53%	34%

Federation (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	255	143	*
Share of RM %	4%	5%	-
Expenditure (\$M)	95	80	*
Share of RM %	5%	5%	-

Greater Hume Shire (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	216	93	*
Share of RM %	4%	3%	-
Expenditure (\$M)	44	34	*
Share of RM %	2%	2%	-

Murray River (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	314	203	*
Share of RM %	6%	7%	-
Expenditure (\$M)	127	115	*
Share of RM %	6%	8%	-



Albury (C)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	1,303	592	711
Share of RM %	23%	21%	25%
Expenditure (\$M)	532	404	128
Share of RM %	26%	27%	24%

Balranald (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	146	101	*
Share of RM %	3%	4%	-
Expenditure (\$M)	29	28	*
Share of RM %	1%	2%	-

Berrigan (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	182	96	*
Share of RM %	3%	3%	-
Expenditure (\$M)	49	44	*
Share of RM %	2%	3%	-

Edward River (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	142	107	*
Share of RM %	2%	4%	-
Expenditure (\$M)	48	44	*
Share of RM %	2%	3%	-

Source: Tourism Research Australia, National Visitor Survey.

Notes:

- Items with * are available but not statistically reliable.
- Other LGA that make up **The Murray TR** include: Wentworth and Murrumbidgee (part). Data are available but not statistically reliable.



Is your region getting its **share** of the **Visitor/Tourism economy**?

RIVERINA MURRAY DN TOTAL DOMESTIC

RIVERINA

TOTAL Riverina	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	2,610	1,352	1,258
Share of RM %	46%	48%	43%
Expenditure (\$M)	895	577	318
Share of RM %	44%	39%	59%

Cootamundra-Gundagai Reg (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	182	140	*
Share of RM %	3%	5%	-
Expenditure (\$M)	53	49	*
Share of RM %	3%	3%	-

Griffith (C)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	387	199	*
Share of RM %	7%	7%	-
Expenditure (\$M)	158	91	*
Share of RM %	8%	6%	-

Hay (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	162	124	*
Share of RM %	3%	4%	-
Expenditure (\$M)	37	31	*
Share of RM %	2%	2%	-

Narrandera (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	164	*	*
Share of RM %	3%	-	-
Expenditure (\$M)	39	*	*
Share of RM %	2%	-	-

Wagga Wagga (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	1,337	619	718
Share of RM %	23%	22%	25%
Expenditure (\$M)	505	293	213
Share of RM %	25%	20%	39%

5,708

VISITORS
(000)



7,223

NIGHTS
(000)



\$2,015

EXPENDITURE
(\$M)



SNOWY MOUNTAINS

(Snowy Valleys LGA)

TOTAL Snowy Mountains	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	488	186	*
Share of RM %	9%	7%	-
Expenditure (\$M)	133	99	*
Share of RM %	7%	7%	-

CENTRAL NSW

(Bland LGA)

Source: Tourism Research Australia, National Visitor Survey.

Notes:

- Items with * are available but not statistically reliable.
- Other LGA that make up **Riverina TR** include: Carrathool, Coolamon, Junee, Leeton, Lockhart, Murrumbidgee (part) and Temora. Data are available but not statistically reliable.
- Central NSW TR** data are available but not statistically reliable. LGA that make up **Central NSW TR** include: Bland. Data are available but not statistically reliable.