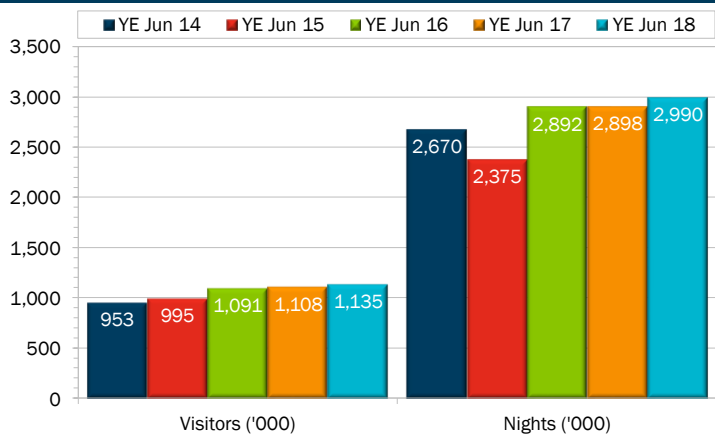


Domestic Overnight Travel¹

Visitors and nights



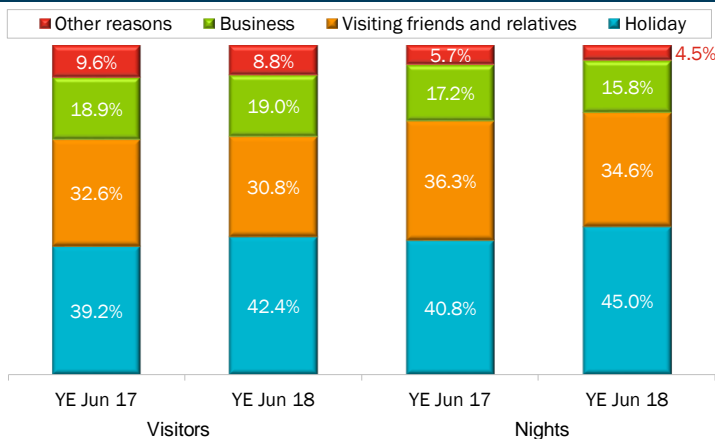
The Murray received over 1.1 million domestic overnight visitors – up by 2.4% on YE Jun 17. Visitors spent nearly 3.0 million nights in the region – up by 3.2% on YE Jun 17.

Note: The number of domestic overnight trips to regional New South Wales increased by 9.4 percent* on last year and by 26.4 percent* compared to four years ago.

Market share

The region received 4.9% of visitors and 4.0% of nights in regional NSW. Compared to YE Jun 17, the share of visitors was down by 0.3% pts and the share of nights was down by 0.2% pts.

Purpose of visit to The Murray



'Holiday' (42.4%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives (VFR)' (30.8%) and 'business' (19.0%). Compared to YE Jun 17, visitors who travelled for 'holiday' grew by 10.7% while 'VFR' declined by 3.3% and 'business' increased by 2.8%.

'Holiday' (45.0%) was the largest purpose in terms of nights in the region, followed by 'VFR' (34.6%) and 'business' (15.8%). Compared to YE Jun 17, nights spent for 'holiday' grew by 13.6% while 'VFR' declined by 1.7% and 'business' decreased by 5.3%.

Accommodation used in The Murray

'Friends or relatives property' (31.6%) was the most popular accommodation used for nights in the region. 'Standard hotel or motor inn, below 4 star' (20.6%) was the 2nd most popular, followed by 'caravan park or commercial camping ground' (17.5%).

Origin

Origin	Share of visitors		Share of nights	
	YE Jun 17	YE Jun 18	YE Jun 17	YE Jun 18
Regional NSW	23.7%	22.3%	19.9%	17.8%
Sydney	11.0%	10.4%	10.8%	8.6%
Total intrastate	34.6%	32.8%	30.8%	26.4%
Victoria	53.9%	54.7%	58.0%	58.9%
South Australia	4.1%	5.6%	3.5%	6.5%
Queensland	3.1%	4.5%	4.7%	5.2%
Other interstate	4.3%	2.4%	3.0%	3.0%
Total interstate	65.4%	67.2%	69.2%	73.6%

Victoria (54.7%) was the largest source of visitors to the region, followed by regional NSW (22.3%) and Sydney (10.4%). Compared to YE Jun 17, the regional NSW source market declined by 3.3% and Sydney decreased by 2.4%. Over the same period, Victoria grew by 4.0% and South Australia increased by 41.2% while Queensland grew by 45.9%.

Victoria (58.9%) was the largest source market in terms of nights in the region, followed by regional NSW (17.8%) and Sydney (8.6%). Compared to YE Jun 17, nights spent by visitors from regional NSW declined by 7.8% and nights from Sydney decreased by 18.2%. Over the same period, Victorian nights grew by 4.8% and nights by visitors from South Australia increased by 90.0% while Queensland nights grew by 13.4%.

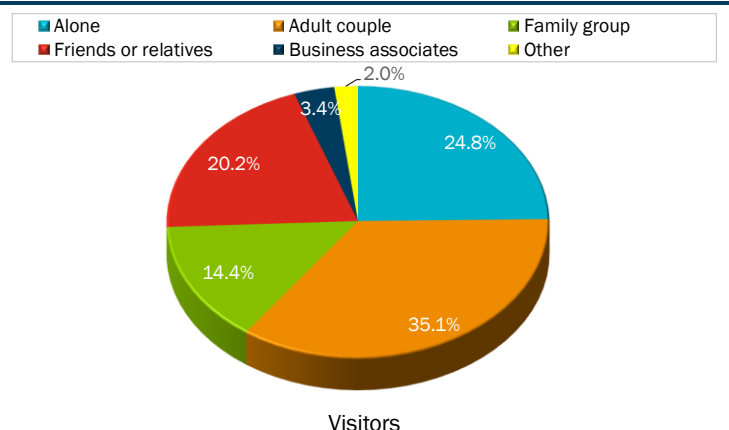
Top activities in The Murray

'Eat out, dine at a restaurant or cafe' (57.9%) was the most popular activity undertaken by visitors to the region, followed by 'visit friends and relatives' (35.8%) and 'pubs, clubs, discos etc' (28.8%).

Age groups

'60 to 69 years' (21.6%) was the largest age group of visitors to the region, followed by '15 to 29 years' (18.9%) and '50 to 59 years' (15.9%).

Travel party



'Adult couple' (35.1%) was the most common travel party amongst visitors to the region, followed by 'alone' (24.8%) and 'friends or relatives' (20.2%).

Expenditure (incl airfares and transport costs)³

Domestic overnight visitors spent \$480 million in the region – up by 31.9%* on YE Jun 17. On average, they spent \$160 per night – up by 27.9% on YE Jun 17.

(3) Source: TRA's expenditure allocation method applied to NVS data, YE Jun 18.

Travel To The Murray

Year ended June 2018

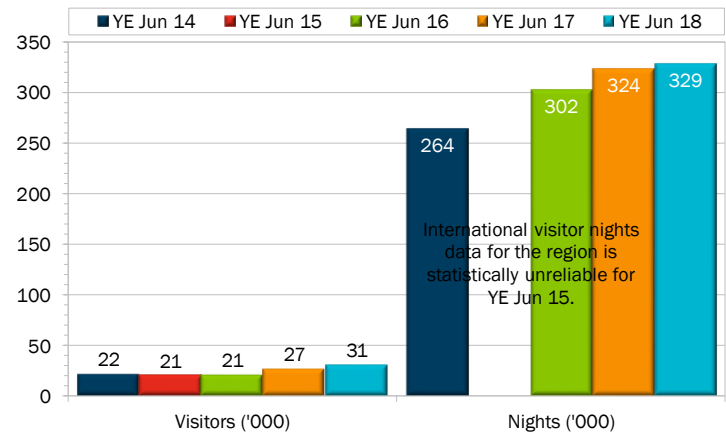
For the period of July 2017 to June 2018

Sources: (1) NVS YE & (2) IVS, YE Jun 18, TRA - unless otherwise specified.

Preliminary	YE Jun 18	YE on YE growth	Share of region			Share of regional NSW	Rank in regional NSW
			international overnight	domestic overnight	domestic daytrips		
Total visitors (million)	2.6	10.6%	1.2%	44.1%	54.7%	4.1%	10
Total nights (million)	3.3	3.0%	9.9%	90.1%	0.0%	3.7%	10
Total spend (million)	\$695	32.6%	2.9%	69.1%	28.1%	4.1%	10

International Overnight Travel² - preliminary

Visitors and nights



The Murray received 30,800 international overnight visitors - up by 16.0% on YE Jun 17. Visitors spent 328,600 nights in the region - up by 1.6% on YE Jun 17.

Note: The number of overnight trips to regional New South Wales by international visitors increased by 6.2 percent* on last year and by 40.4 percent* compared to four years ago.

Market share

The region received 3.6% of visitors and 2.3% of nights in regional NSW. Compared to YE Jun 17, the share of visitors was up by 0.3% pts and the share of nights was up by 0.1% pt.

Origin - share of visitors to The Murray

Rank	Individual market	Share of international visitors to The Murray		
		YE Jun 17	YE Jun 18	Origin region
1	United Kingdom	12.2%	18.0%	Europe
2	New Zealand	12.2%	14.5%	North America
3	Germany	np	10.2%	Asia
4	np	np	np	New Zealand & Oceania
5	np	np	np	Other Countries

The United Kingdom (18.0%) was the region's largest individual source market of visitors, followed by New Zealand (14.5%) and Germany (10.2%).

Accommodation in The Murray

'Standard hotel or motor inn, below 4 star' (31.1%) was the most popular form of accommodation used by visitors in the region, followed by 'friends or relatives property' (26.4%).

Age groups

'15 to 29 years' (30.1%) was the largest age group of visitors to the region, followed by '30 to 39 years' (20.0%) and '60 to 69 years' (15.2%).

Expenditure (incl 30% prepaid package expenditure)⁴

International overnight visitors spent \$20 million in the region - up by 4.4% on YE Jun 17. On average, they spent \$61 per night in the region - up by 2.8% on YE Jun 17.

(4) Source: TRA's expenditure allocation method applied to IVS data, YE Jun 18.

Preliminary IVS results

Due to quality issues with the incoming passenger data, IVS results for the YE Jun 18 are preliminary and do not include any data relating to purpose of visit. There are no issues with the survey collection.

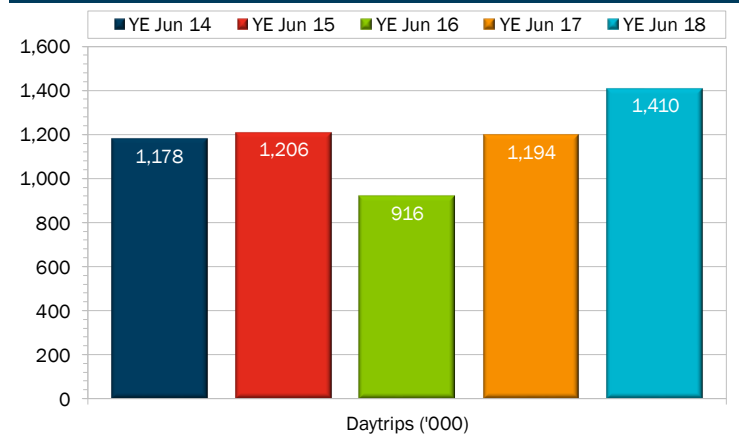
Please note: Due to quality issues with the incoming passenger data, IVS and total travel results for the YE Jun 18 are preliminary.

* The percentage change is statistically significant.

np = Not published due to insufficient sample.

Domestic Daytrip Travel⁴

Daytrips



The Murray received over 1.4 million domestic daytrip visitors - up by 18.0% on YE Jun 17.

Note: The number of domestic daytrips to regional New South Wales increased by 4.0 percent* on last year and by 18.2 percent* compared to four years ago.

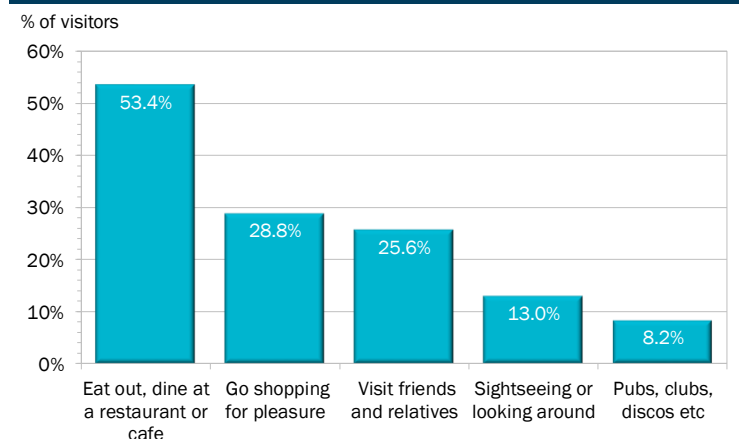
Market share

The region received 3.7% of daytrips to regional NSW. Compared to YE Jun 17, the share was up by 0.4% pts.

Main purpose of trip

'Holiday' (49.9%) was the largest purpose of trip for visitors to the region, followed by 'medical reasons' (16.8%) and 'visiting friends and relatives (VFR)' (16.4%). Compared to YE Jun 17, visitors who travelled for 'holiday' grew by 54.8%* and 'medical reasons' increased by 69.9%* while 'VFR' declined by 33.2%.

Top activities in The Murray



'Eat out, dine at a restaurant or cafe' (53.4%) was the most popular activity undertaken by visitors to the region.

Expenditure³

Domestic daytrip visitors spent \$195 million in the region - up by 38.3%* on YE Jun 17. On average, they spent \$138 per trip - up by 17.2% on YE Jun 17.

(3) Source: TRA's expenditure allocation method applied to NVS data, YE Jun 18.

Further information

Please see www.destinationnsw.com.au for profiles on travel to the other regions in NSW and information on international and domestic travel to the State.