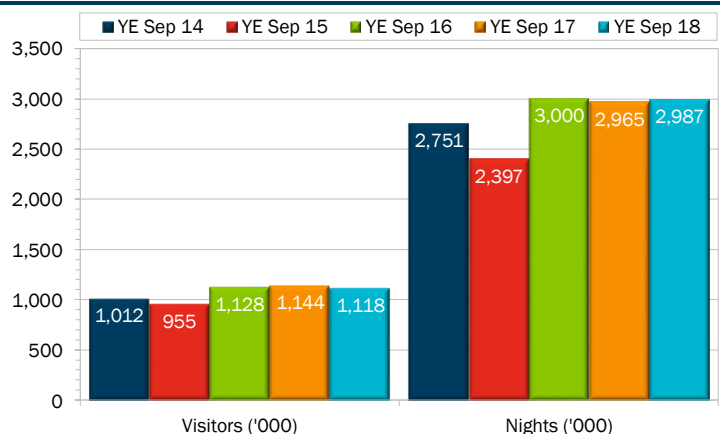


## Domestic Overnight Travel<sup>1</sup>

### Visitors and nights



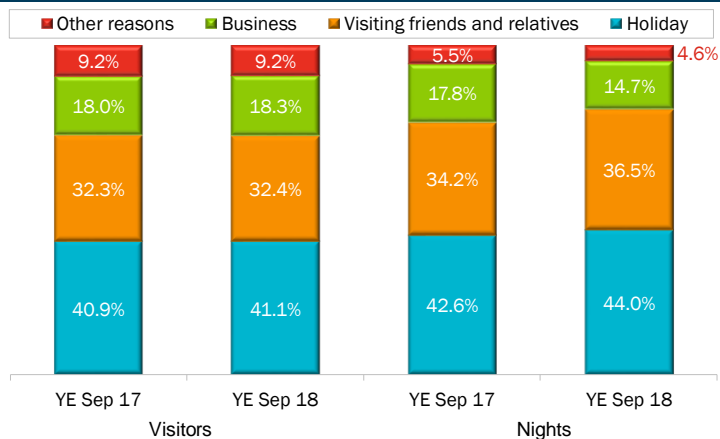
The Murray received over 1.1 million domestic overnight visitors – down by 2.2% on YE Sep 17. Visitors spent nearly 3.0 million nights in the region - up by 0.8% on YE Sep 17.

Note: The number of domestic overnight trips to regional New South Wales increased by 7.7 percent\* on last year and by 28.1 percent\* compared to four years ago.

### Market share

The region received 4.7% of visitors and 3.9% of nights in regional NSW. Compared to YE Sep 17, the share of visitors was down by 0.5 pts and the share of nights was down by 0.2% pts.

### Purpose of visit to The Murray



'Holiday' (41.1%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives (VFR)' (32.4%) and 'business' (18.3%). Compared to YE Sep 17, visitors who travelled for 'holiday' declined by 1.6% and 'VFR' decreased by 1.8% while 'business' fell by 0.9%.

'Holiday' (44.0%) was the largest purpose in terms of nights in the region, followed by 'VFR' (36.5%) and 'business' (14.7%). Compared to YE Sep 17, nights spent for 'holiday' grew by 4.1% and 'VFR' increased by 7.8% while 'business' declined by 16.7%.

### Accommodation used in The Murray

'Friends or relatives property' (34.9%) was the most popular accommodation used for nights in the region. 'Standard hotel or motor inn, below 4 star' (18.7%) was the 2<sup>nd</sup> most popular, followed by 'caravan park or commercial camping ground' (18.1%).

### Origin

Origin	Share of visitors		Share of nights	
	YE Sep 17	YE Sep 18	YE Sep 17	YE Sep 18
Regional NSW	23.1%	22.3%	16.8%	18.4%
Sydney	12.2%	11.6%	12.5%	9.5%
Total intrastate	35.3%	34.0%	29.3%	27.9%
Victoria	52.8%	52.6%	58.6%	56.3%
Queensland	3.0%	5.8%	4.1%	7.2%
South Australia	5.3%	4.8%	5.3%	5.5%
Other interstate	3.6%	2.9%	2.7%	3.1%
Total interstate	64.7%	66.0%	70.7%	72.1%

Victoria (52.6%) was the largest source of visitors to the region, followed by regional NSW (22.3%) and Sydney (11.6%). Compared to YE Sep 17, the regional NSW source market declined by 5.5% and Sydney decreased by 6.4%. Over the same period, Victoria declined by 2.5% while Queensland grew by 88.0%\* and South Australia decreased by 13.0%.

Victoria (56.3%) was the largest source market in terms of nights in the region, followed by regional NSW (18.4%) and Sydney (9.5%). Compared to YE Sep 17, nights spent by visitors from regional NSW grew by 10.4% while nights from Sydney declined by 23.5%. Over the same period, Victorian nights declined by 3.1% while Queensland nights grew by 74.8% and nights by visitors from South Australia increased by 4.6%.

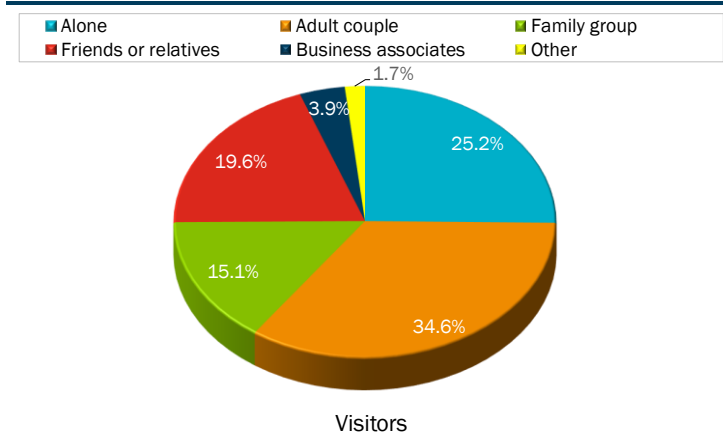
### Top activities in The Murray

'Eat out, dine at a restaurant or cafe' (56.1%) was the most popular activity undertaken by visitors to the region, followed by 'visit friends and relatives' (38.7%) and 'pubs, clubs, discos etc' (27.6%).

### Age groups

'60 to 69 years' (22.5%) was the largest age group of visitors to the region, followed by '15 to 29 years' (18.2%) and '30 to 39 years' (16.1%).

### Travel party



'Adult couple' (34.6%) was the most common travel party amongst visitors to the region, followed by 'alone' (25.2%) and 'friends or relatives' (19.6%).

### Expenditure (incl airfares and transport costs)<sup>3</sup>

Domestic overnight visitors spent \$454 million in the region - up by 8.9% on YE Sep 17. On average, they spent \$152 per night - up by 8.1% on YE Sep 17.

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

# Travel To The Murray

Year ended September 2018

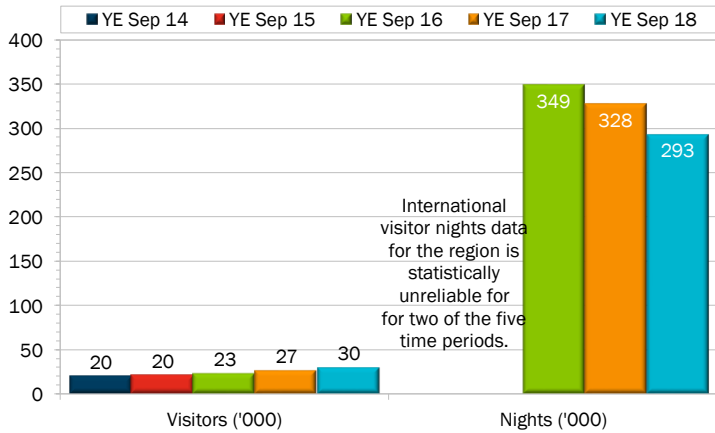
For the period of October 2017 to September 2018

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

Preliminary	YE Sep 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	3.9%	1.2%	43.6%	55.3%	4.0%	10
Total nights (million)	3.3	-0.4%	8.9%	91.1%	0.0%	3.6%	10
Total spend (million)	\$704	20.2%	3.1%	64.5%	32.4%	4.0%	11

## International Overnight Travel<sup>2</sup> - preliminary

### Visitors and nights



The Murray received 29,800 international overnight visitors - up by 12.2% on YE Sep 17. Visitors spent 293,500 nights in the region - down by 10.6% on YE Sep 17.

Note: The number of overnight trips to regional New South Wales by international visitors increased by 4.6 percent\* on last year and by 40.3 percent\* compared to four years ago.

### Market share

The region received 3.4% of visitors and 2.0% of nights in regional NSW. Compared to YE Sep 17, the share of visitors was up by 0.2% pts and the share of nights was down by 0.1% pt.

### Origin - share of visitors to The Murray

Rank	Individual market	Share of international visitors to The Murray		
		YE Sep 17	YE Sep 18	Origin region
1	United Kingdom	11.5%	19.0%	Europe
2	New Zealand	10.3%	13.9%	North America
3	Germany	np	8.3%	Asia
4	np	np	np	New Zealand & Oceania
5	np	np	np	Other Countries

The United Kingdom (19.0%) was the region's largest individual source market of visitors, followed by New Zealand (13.9%) and Germany (8.3%).

### Accommodation in The Murray

'Standard hotel or motor inn, below 4 star' (29.5%) was the most popular form of accommodation used by visitors in the region, followed by 'friends or relatives property' (22.8%).

### Age groups

'15 to 29 years' (28.6%) was the largest age group of visitors to the region, followed by '60 to 69 years' (18.8%) and '30 to 39 years' (17.4%).

### Expenditure (incl 30% prepaid package expenditure)<sup>4</sup>

International overnight visitors spent \$22 million in the region - up by 19.6% on YE Sep 17. On average, they spent \$74 per night in the region - up by 33.8% on YE Sep 17.

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

### Preliminary IVS results

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

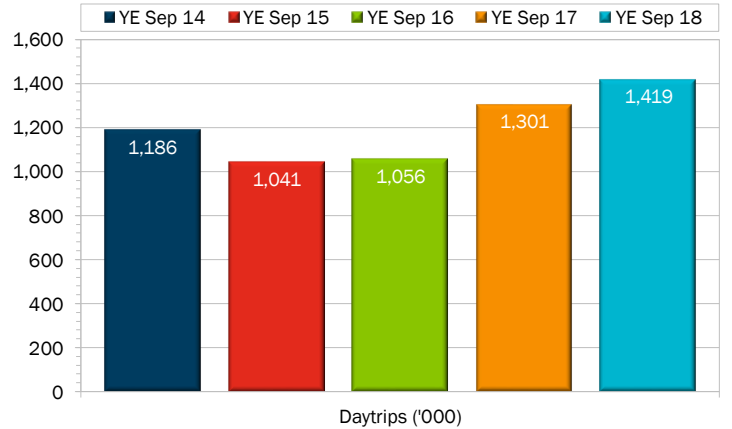
Please note: Due to quality issues with the incoming passenger data, IVS and total travel results for the YE Sep 18 are preliminary.

\* The percentage change is statistically significant.

np = Not published due to insufficient sample.

## Domestic Daytrip Travel<sup>4</sup>

### Daytrips



The Murray received over 1.4 million domestic daytrip visitors - up by 9.0% on YE Sep 17.

Note: The number of domestic daytrips to regional New South Wales increased by 3.7 percent on last year and by 20.3 percent\* compared to four years ago.

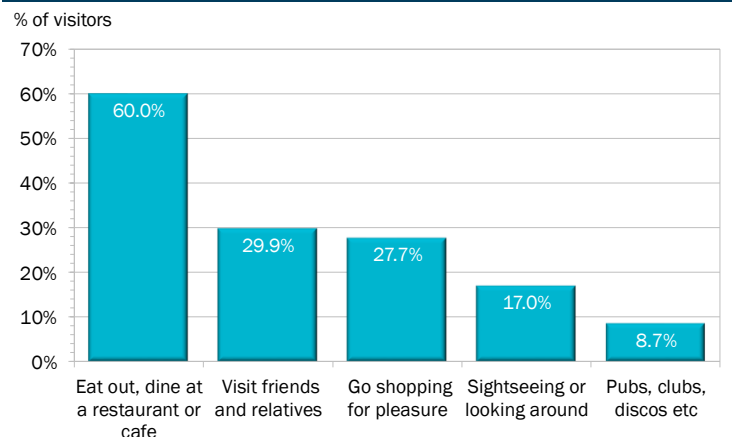
### Market share

The region received 3.6% of daytrips to regional NSW. Compared to YE Sep 17, the share was up by 0.2% pts.

### Main purpose of trip

'Holiday' (48.6%) was the largest purpose of trip for visitors to the region, followed by 'visiting friends and relatives (VFR)' (18.4%) and 'medical reasons' (15.1%). Compared to YE Sep 17, visitors who travelled for 'holiday' grew by 21.0% while 'VFR' declined by 15.8% and 'medical reasons' grew by 69.7%\*.

### Top activities in The Murray



'Eat out, dine at a restaurant or cafe' (60.0%) was the most popular activity undertaken by visitors to the region.

### Expenditure<sup>3</sup>

Domestic daytrip visitors spent \$228 million in the region - up by 51.7%\* on YE Sep 17. On average, they spent \$161 per trip - up by 39.2% on YE Sep 17.

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

### Further information

Please see [www.destinationnsw.com.au](http://www.destinationnsw.com.au) for profiles on travel to the other regions in NSW and information on international and domestic travel to the State.