



Destination
Country and Outback NSW

The Value of Tourism to Country & Outback NSW 2022



**Every minute of every day,
Tourism delivers \$4,351 of
domestic visitor spend into
Country & Outback NSW**

**That is \$6.3 million per day!
A value that has grown by 63.7%
in the last year alone.**

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

This year the number of total domestic visitors to the Country and Outback DN is 5.3 million or 22 per cent below the pre-Covid period (year 2019), but 14 per cent above the 2021 visitation level.

Tourism delivers **6.9%** of our jobs, supports **3,559** businesses and directly delivers **2.9%** of our region's Gross Value Add (GVA) which has grown every year since 2010/11 at an average **1.7%** 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 employment 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 employment 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

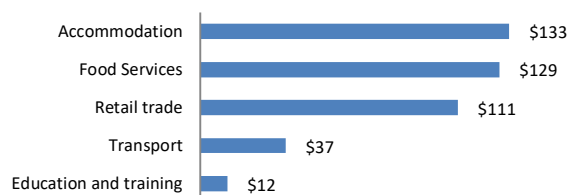
Tourism's DIRECT Contribution to Employment

FULL TIME 4,845

PART TIME 5,800



Country and Outback
Industry share of Direct Tourism GVA (\$m)



Supporting our local economy, Tourism supplies 6.9% of the region's employment including 10,645 persons who are directly employed and a further 2,613 who are indirectly employed.

There are 3,559 tourism related businesses in Country and Outback DN, around 9% of all Regional NSW Tourism businesses.

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

Economically, tourism businesses directly deliver \$529 million (2.9%) of the region's GVA – 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 | \$ | \$ |
| Country and Outback | Dec-2022 | 227 | 6,110 | 2,240 | 1,493 | 66.6% | 260 | 174 | 116 |
| | %Ch on 2021 | 0% | 0.03% | 0.1% | 9.6% | 16.2 ppts* | 48.8% | 12.6% | 13.5% |

*percentage point change

Source: STR Tourist Accommodation, 2022

Country and Outback DN has 227 accommodation establishments with a room stock of 6,110 (for establishments with ten rooms or more).



Domestic direct inbound seats and flights have increased in 2022 with a total of 11,046 flights (+55.6% yoy) delivering 456,001 seats (+68.9% yoy).

Source: Official Airline Guide OAG

Note

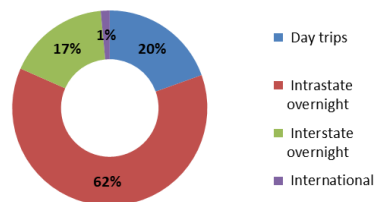
- Visitor Economy includes money spent directly in the tourism industry and other related expenditure by the flow-on effect of the tourism industry.
- Gross Value Added (GVA), Tourism Jobs and Businesses data p.a. are only available by tourism regions (TR) in official statistics. For each DN, GVA was 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).

Country and Outback DN is **Number 1 DN** in terms of Day trip spend per visitor!

ECONOMIC VALUE OF TOURISM

In terms of what is consumed by Tourism, Country and Outback DN represents about 8% of the state's Total Tourism Consumption. This is mostly delivered by Intrastate tourism to the Region. Country and Outback has a substantial Domestic tourism market.

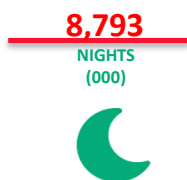
Country and Outback \$2.0 b*
Share of DN consumption



*FY 2020-2021 tourism consumption data

Country and Outback DN domestic visitation has grown 60.7% since 2016 in terms of visitor expenditure value.

COUNTRY AND OUTBACK DN TOTAL DOMESTIC

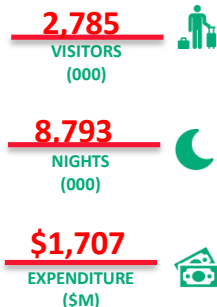


TRAVEL TYPE

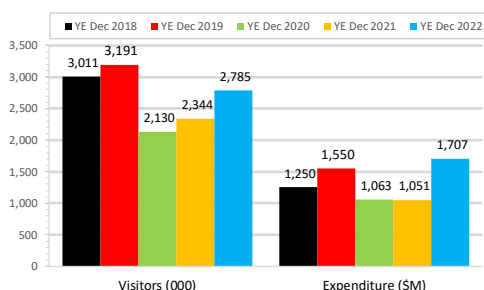
ORIGIN

Domestic Overnight

Source: Tourism Research Australia, National Visitor Survey.



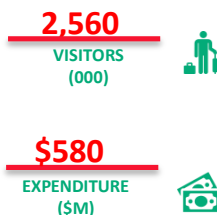
Visitors and Expenditure



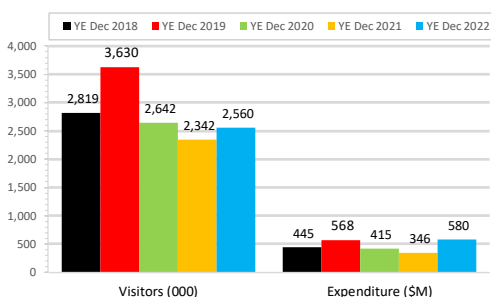
| Origin | Share of Visitors | | Share of Expenditure | |
|------------------|-------------------|-------------|----------------------|-------------|
| | YE Dec 2021 | YE Dec 2022 | YE Dec 2021 | YE Dec 2022 |
| Sydney | 19.8% | 19.2% | 25.5% | 22.4% |
| Regional NSW | 57.1% | 52.7% | 52.0% | 52.0% |
| Total Intrastate | 76.8% | 71.9% | 77.5% | 74.3% |
| Victoria | 5.4% | 7.5% | 4.8% | 7.8% |
| Queensland | 13.6% | 14.5% | 13.4% | 12.2% |
| South Australia | * | 3.9% | * | 3.4% |
| Other Interstate | * | 2.1% | * | 2.2% |
| Total Interstate | 23.2% | 28.1% | 22.5% | 25.7% |

Domestic Daytrip

Source: Tourism Research Australia, National Visitor Survey.



Visitors and Expenditure



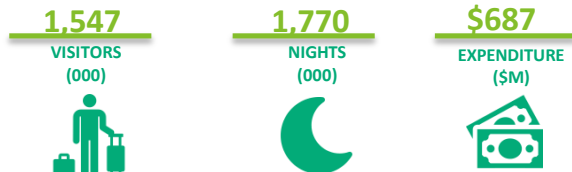
| Origin | Share of Visitors | | Share of Expenditure | |
|------------|-------------------|-------------|----------------------|-------------|
| | YE Dec 2021 | YE Dec 2022 | YE Dec 2021 | YE Dec 2022 |
| Interstate | * | * | * | * |
| Intrastate | 98.5% | 97.6% | 99.5% | 94.3% |

Note:

□ Items with * are available but not statistically reliable.

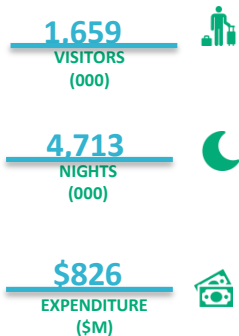
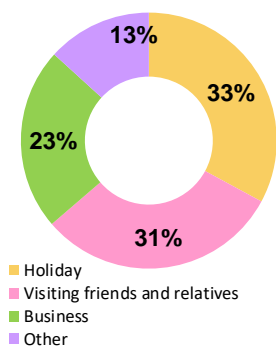
NEW ENGLAND NORTH WEST

CENTRAL NSW

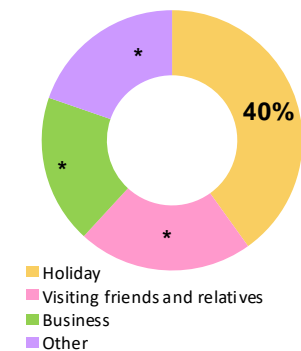
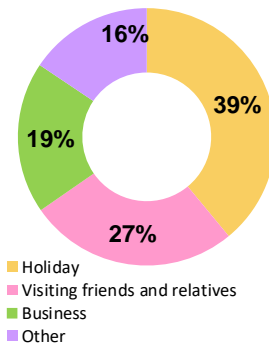


Note: Purpose of visit shares provided only when statistically reliable

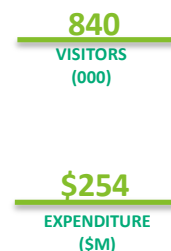
TRAVEL TYPE



Domestic Overnight



Domestic Daytrip

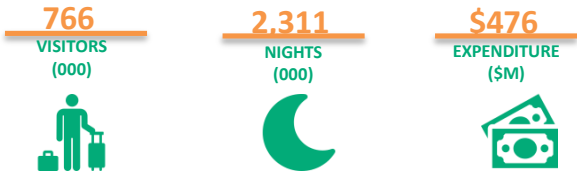


Source: Tourism Research Australia, National Visitor Survey.

Note:
 Items with * are available but not statistically reliable.
 Domestic Daytrip POV data for Central NSW is available but not statistically reliable due to small sample size.

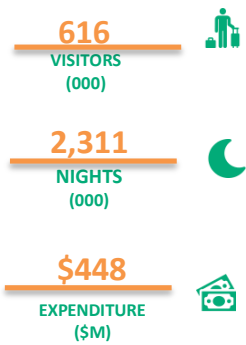
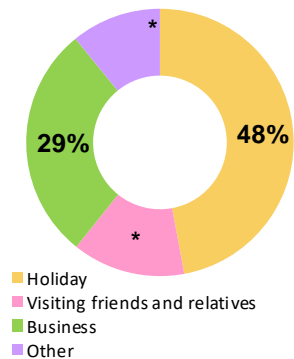


OUTBACK NSW



Note: Purpose of visit shares provided only when statistically reliable

TRAVEL TYPE



Domestic Overnight

Source: Tourism Research Australia, National Visitor Survey.

Note:

- Items with * are available but not statistically reliable.
- Domestic Daytrip data for Outback NSW is available but not statistically reliable due to small sample size.



Events deliver visitors, visitor nights and visitor spend into Country and Outback DN

In 2022, Country and Outback DN has secured events that have delivered \$154 million worth of visitor expenditure into the state.



COUNTRY AND OUTBACK DN EVENTS DELIVERED...

Domestic Overnight



127

VISITORS
(000)



384

NIGHTS
(000)



\$139

EXPENDITURE
(\$M)



Source: Tourism Research Australia, National Visitor Survey.

SAMPLE OF COUNTRY AND OUTBACK DN EVENTS

- Perfect Light Film Festival
- TOYOTA Country Music Festival Tamworth
- Broken Hill Mundi Mundi Bash
- Orange Chamber Music Festival
- NCHA Futurity
- Dubbo Stampede
- Pulse of the Earth - A Festival of Regeneration
- Grazing Down The Lachlan
- Walcha Motorcycle Rally



Photo Credit: Rick Stevens, Tamworth Country Music Festival, Destination NSW

Note:

- Daytrip event visitor data in Country and Outback 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 |
|--|--------------------|------------------|
| Eat out / dine at a restaurant and/or cafe | 51% | 33% |
| Pubs, clubs, discos etc | 28% | * |
| Visit friends & relatives | 26% | * |
| Sightseeing/looking around | 19% | * |
| Bushwalking / rainforest walks | 13% | * |
| Go shopping for pleasure | 12% | 17% |
| Visit national parks / state parks | 12% | * |
| Visit museums or art galleries | 9% | * |
| Visit history / heritage buildings, sites or monuments | 6% | * |
| Other outdoor activities nfd | 4% | * |
| Visit wildlife parks / zoos / aquariums | 4% | * |
| Visit industrial tourist attractions / mines / breweries | 4% | n/a |

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**?

COUNTRY AND OUTBACK DN
TOTAL DOMESTIC

5,346
VISITORS
(000)



8,793
NIGHTS
(000)



\$2,287
EXPENDITURE
(\$M)



NEW ENGLAND NORTH WEST

TOTAL New England North West

| | Total Domestic | Domestic Overnight | Daytrip |
|-------------------|----------------|--------------------|---------|
| Visitors (000) | 3,229 | 1,659 | 1,570 |
| Share of CO % | 60% | 60% | 61% |
| Expenditure (\$M) | 1,123 | 826 | 298 |
| Share of CO % | 49% | 48% | 51% |

| Armidale Regional (LGA) | Total Domestic | Domestic Overnight | Daytrip |
|--------------------------------|----------------|--------------------|---------|
| Visitors (000) | 558 | 273 | * |
| Share of CO % | 10% | 10% | - |
| Expenditure (\$M) | 210 | 139 | * |
| Share of CO % | 9% | 8% | - |

| Moree Plains (LGA) | Total Domestic | Domestic Overnight | Daytrip |
|---------------------------|----------------|--------------------|---------|
| Visitors (000) | 366 | 212 | * |
| Share of CO % | 7% | 8% | - |
| Expenditure (\$M) | 119 | 96 | * |
| Share of CO % | 5% | 6% | - |

| Glen Innes Severn (LGA) | Total Domestic | Domestic Overnight | Daytrip |
|--------------------------------|----------------|--------------------|---------|
| Visitors (000) | 182 | 123 | * |
| Share of CO % | 3% | 4% | - |
| Expenditure (\$M) | 40 | 36 | * |
| Share of CO % | 2% | 2% | - |

| Narrabri (LGA) | Total Domestic | Domestic Overnight | Daytrip |
|-----------------------|----------------|--------------------|---------|
| Visitors (000) | 256 | 205 | * |
| Share of CO % | 5% | 7% | - |
| Expenditure (\$M) | 76 | 62 | * |
| Share of CO % | 3% | 4% | - |

| Gunnedah (LGA) | Total Domestic | Domestic Overnight | Daytrip |
|-----------------------|----------------|--------------------|---------|
| Visitors (000) | 245 | 110 | * |
| Share of CO % | 5% | 4% | - |
| Expenditure (\$M) | 62 | 34 | * |
| Share of CO % | 3% | 2% | - |

| Tamworth Regional (LGA) | Total Domestic | Domestic Overnight | Daytrip |
|--------------------------------|----------------|--------------------|---------|
| Visitors (000) | 984 | 509 | 475 |
| Share of CO % | 18% | 18% | 17% |
| Expenditure (\$M) | 397 | 289 | 109 |
| Share of CO % | 17% | 17% | 19% |

| Inverell (LGA) | Total Domestic | Domestic Overnight | Daytrip |
|-----------------------|----------------|--------------------|---------|
| Visitors (000) | 197 | 115 | * |
| Share of CO % | 4% | 4% | - |
| Expenditure (\$M) | 56 | 48 | * |
| Share of CO % | 2% | 3% | - |

| Tenterfield (LGA) | Total Domestic | Domestic Overnight | Daytrip |
|--------------------------|----------------|--------------------|---------|
| Visitors (000) | 164 | 119 | * |
| Share of CO % | 3% | 4% | - |
| Expenditure (\$M) | 61 | 49 | * |
| Share of CO % | 3% | 3% | - |

Source: Tourism Research Australia, National Visitor Survey.

Note:

- ❑ Items with * are available but not statistically reliable
- ❑ Country and Outback DN also includes other Unincorporated areas for which data are available but not statistically reliable.
- ❑ Other LGAs that make up **New England North West TR** include Uralla, Walcha, Gwydir and Liverpool Plains. Data for these LGAs are available but not statistically reliable

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

COUNTRY AND OUTBACK DN
TOTAL DOMESTIC

5,346
VISITORS
(000)



8,793
NIGHTS
(000)



\$2,287
EXPENDITURE
(\$M)



CENTRAL NSW

OUTBACK NSW

| TOTAL Central NSW | Total Domestic | Domestic Overnight | Daytrip |
|-------------------|----------------|--------------------|---------|
| Visitors (000) | 1,547 | 708 | 840 |
| Share of CO % | 29% | 25% | 33% |
| Expenditure (\$M) | 687 | 433 | 254 |
| Share of CO % | 30% | 25% | 44% |

| TOTAL Outback NSW | Total Domestic | Domestic Overnight | Daytrip |
|-------------------|----------------|--------------------|---------|
| Visitors (000) | 766 | 616 | 150 |
| Share of CO % | 14% | 22% | 6% |
| Expenditure (\$M) | 476 | 448 | 28 |
| Share of CO % | 21% | 26% | 5% |

| Dubbo Regional (LGA) | Total Domestic | Domestic Overnight | Daytrip |
|----------------------|----------------|--------------------|---------|
| Visitors (000) | 1,106 | 485 | 621 |
| Share of CO % | 21% | 17% | 24% |
| Expenditure (\$M) | 577 | 352 | 224 |
| Share of CO % | 25% | 21% | 39% |

| Bourke (LGA) | Total Domestic | Domestic Overnight | Daytrip |
|-------------------|----------------|--------------------|---------|
| Visitors (000) | 106 | 92 | * |
| Share of CO % | 2% | 3% | - |
| Expenditure (\$M) | 39 | 38 | * |
| Share of CO % | 2% | 2% | - |

| Warrumbungle Shire (LGA) | Total Domestic | Domestic Overnight | Daytrip |
|--------------------------|----------------|--------------------|---------|
| Visitors (000) | 218 | 140 | - |
| Share of CO % | 4% | 5% | - |
| Expenditure (\$M) | 50 | 40 | - |
| Share of CO % | 2% | 2% | - |

| Broken Hill (LGA) | Total Domestic | Domestic Overnight | Daytrip |
|-------------------|----------------|--------------------|---------|
| Visitors (000) | 260 | 260 | - |
| Share of CO % | 5% | 9% | - |
| Expenditure (\$M) | 205 | 195 | - |
| Share of CO % | 9% | 9% | - |

Source: Tourism Research Australia, National Visitor Survey.

| Central Darling (LGA) | Total Domestic | Domestic Overnight | Daytrip |
|-----------------------|----------------|--------------------|---------|
| Visitors (000) | 140 | 107 | * |
| Share of CO % | 3% | 4% | - |
| Expenditure (\$M) | 49 | 44 | * |
| Share of CO % | 2% | 2% | - |

| Cobar (LGA) | Total Domestic | Domestic Overnight | Daytrip |
|-------------------|----------------|--------------------|---------|
| Visitors (000) | 155 | 137 | * |
| Share of CO % | 3% | 5% | - |
| Expenditure (\$M) | 65 | 65 | - |
| Share of CO % | 3% | 3% | - |

Note:

- Items with * are available but not statistically reliable
- Other LGAs that make up **Central NSW TR** include Coonamble, Gilgandra and Narromine. Data for these LGAs are available but not statistically reliable.
- Other LGAs that make up **Outback NSW TR** include Bogan, Brewarrina, Walgett and Warren. Data for these LGAs are available but not statistically reliable.
- Country and Outback DN also includes other Unincorporated areas for which data are available but not statistically reliable.