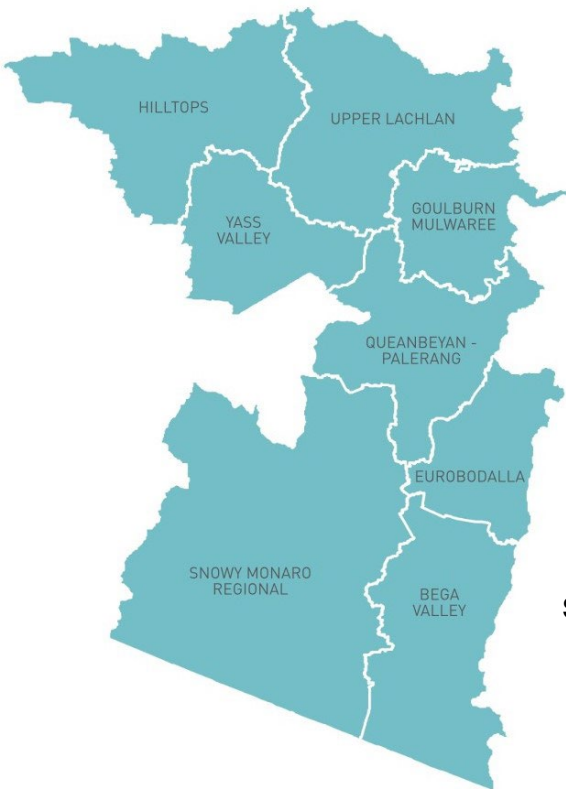




Destination
Southern NSW

The Value of Tourism to Southern NSW 2023



**Every minute of every day,
tourism delivers \$5,286
of total visitor spend into
Southern NSW**

**That is \$7.6 million per day!
A value that has grown by 30.9%
since year ended (YE) December 2019.**

In 2023, there were 6.7 million total visitors to the Southern NSW DN, 4 per cent below the pre-Covid period (YE December 2019).

Note: Data in this report is from Financial Year (FY) 2022-23 (Jul 22 – Jun 23) or Calendar Year 2023 (Jan 23 – Dec 23). Please refer to individual source notes for the specific time reference.

Note: * means data not publishable.



In this DN, tourism delivers **8.2%** of jobs, supports **3,766** businesses and directly delivers **5.2%** of the region's Gross Value Add (GVA) which has grown at an average rate of **3.9%** p.a. since FY2010-11.

TOURISM SECTOR IN NSW

In FY2021-22, NSW's tourism sector (2.7% share of state GVA) was worth more than Agriculture, Forestry & Fishing (2.6%) but less than Mining (4.5%). The total filled jobs were about 3.8% of the state's total filled jobs and 66.7% of the 10-year (2012-2021) average filled jobs in the visitor economy.

In FY2022-23, NSW's visitor economy (4.7% share of state GVA) was worth more than Mining (4.5%) but less than Education & Training (5.1%). The total filled jobs were about 6.1% of the state's total filled jobs and 115% of the 10-year (2013-2022) average filled jobs in the visitor economy.

Source: TRA. 2023. STSA FY2021-22; TRA. 2024. STSA FY2022-23

TOURISM INVESTMENT IN NSW

In FY2022-23 Australia's tourism investment pipeline consisted of 307 projects with a value of \$56.1 billion. NSW held 26% of the projects as the second largest (behind Victoria) nationwide, with 81 projects valued at \$14.3bn.

1. Capital city investment (\$13.0bn)
2. Aviation (\$5.6bn)
3. Arts, recreation & business services (\$5.3bn)
4. Accommodation (\$3.4bn)
5. Regional investment (\$1.4bn)

Note: tourism investment pipeline represents all known major tourism-related projects having an estimated financial value of \$20 million or more in 3 main tourism segments: aviation; art, recreation and business services; and accommodation.

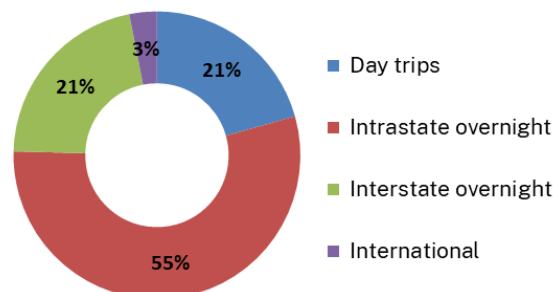
Source: TRA. 2024. Tourism Investment Monitor FY2022-23.

ECONOMIC VALUE OF REGIONAL TOURISM

Tourism consumption in Southern NSW DN represented about 6% of NSW's total tourism consumption, which was mostly delivered by the intrastate overnight market (55%).

Note: tourism consumption is estimated by the regional data from TRA.
Source: TRA. 2024. STSA FY2022-23.

Southern NSW \$3.1 bn Share of DN consumption



REGIONAL TOURISM EMPLOYMENT & BUSINESSES

Tourism's DIRECT Contribution to Employment

Southern NSW - Industry share of Direct Tourism GVA (\$m)

FULL TIME 6,447

PART TIME 5,284



Accommodation \$229

Food Services \$217

Retail trade \$133

Transport \$93

Education and training \$26

Supporting our local economy, the tourism sector supplied 8.2% of the region's employment including 11,731 persons who are directly employed and a further 5,609 indirectly.

There were 3,766 tourism related businesses in Southern NSW DN, around 10% of all Regional NSW Tourism businesses.

Note: tourism employment and businesses are estimated by the regional data from TRA. Source: TRA. 2024. STSA FY2022-23; TRA. 2024. Tourism Businesses in Australia, June 2023.

Within this DN, tourism businesses directly deliver \$872 million (5.2%) of the region's GVA – over 80% of which was from Accommodation, Food Service, Retail Trade, Transport and Education and Training sectors.

Note: GVA is estimated by the regional data from TRA. Source: TRA. 2024. STSA FY2022-23.

ACCOMMODATION

Establishments with 10 rooms or more		SUPPLY			DEMAND		REVENUE		
Year ended	Establishments no.	Rooms no.	Room nights available (000) no.	Room nights occupied (000) no.	Room occupancy rate	Takings from accommodation \$ millions	Average daily rate \$	Revenue per available room \$	
Southern NSW DN	Dec-2023	224	6,752	2,477	1,405	56.7%	289	206	117
	%Ch on 2022	0.9%	1.4%	1.8%	-0.6%	-1.4 ppts*	-0.7%	-0.1%	-2.5%

*percentage point change

Southern NSW DN has 224 commercial accommodation establishments with 6,752 rooms.

Source: STR. Jul 2024. Tourist Accommodation. Dec 2023.

AVIATION



Domestic direct inbound flights to Southern NSW DN have increased in 2023 with a total of 2,748 flights (+5.4% YoY) delivering 96,582 seats (+3.8% YoY).

Note: airports operating commercial flights in this DN are Cooma (OOM), Merimbula (MIM) & Moruya (MYA). Source: Cirium. Jul 2024. SRS Analyser. 2023.

Travel to Southern NSW DN 2023

DN Visitation Overview

Source: TRA. 2024. Domestic Visitor Survey & International Visitor Survey. YE Dec 2023.



- Total visitors to Southern NSW were **4% lower** than YE Dec 2019.
- Visitor expenditure has **grown 31%** since YE Dec 2019.
- Southern NSW is the **2nd ranked DN** in **percentage growth of daytrip visitors and expenditure.**

6,734

VISITORS
(000)



11,168

NIGHTS
(000)



\$2,778

EXPENDITURE
(\$M)



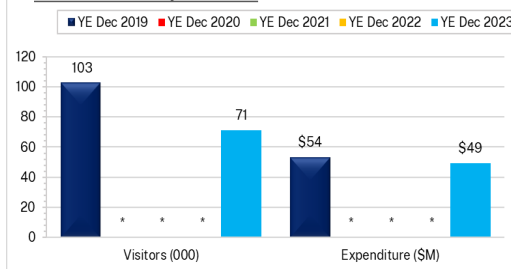
International

71
VISITORS
(000)

709
NIGHTS
(000)

\$49
EXPENDITURE
(\$M)

Visitors and Expenditure



Share of International visitors to Southern NSW DN				
Top Origin	Share of Visitors		Share of Expenditure	
	YE Dec 19	YE Dec 23	YE Dec 19	YE Dec 23
USA	13.9%	*	9.7%	*
UK	16.7%	*	19.0%	*
New Zealand	*	9.1%	*	8.8%
Germany	7.9%	*	5.8%	*
China	*	*	*	*

Origin Region	Share of Visitors	
	YE Dec 19	YE Dec 23
Europe	50.2%	44.2%
North America	16.4%	22.7%
Asia	20.2%	16.6%
Other Countries	13.2%	16.5%

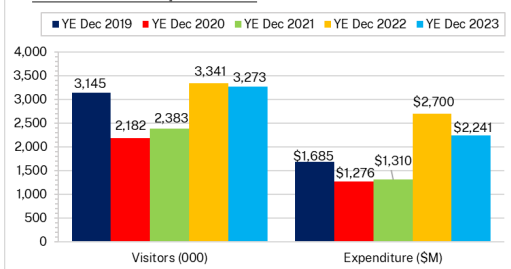
Domestic Overnight

3,273
VISITORS
(000)

10,460
NIGHTS
(000)

\$2,241
EXPENDITURE
(\$M)

Visitors and Expenditure



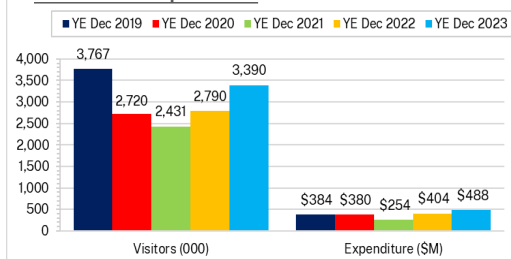
Origin	Share of Visitors		Share of Expenditure	
	YE Dec 22	YE Dec 23	YE Dec 22	YE Dec 23
Regional NSW	34.4%	36.1%	30.5%	37.5%
Sydney	31.5%	28.0%	37.8%	26.9%
Total Intrastate	65.9%	64.2%	68.3%	64.5%
Victoria	13.1%	16.0%	13.1%	18.7%
Australian Capital Territory	15.5%	15.3%	8.9%	12.1%
Queensland	*	*	*	*
Other Interstate	*	*	*	*
Total Interstate	34.1%	35.8%	31.7%	35.5%

Domestic Daytrip

3,390
VISITORS
(000)

\$488
EXPENDITURE
(\$M)

Visitors and Expenditure



Origin	Share of Visitors		Share of Expenditure	
	YE Dec 2022	YE Dec 2023	YE Dec 2022	YE Dec 2023
Intrastate	69.5%	59.9%	76.1%	63.5%
Interstate	30.5%	40.1%	23.9%	36.5%

More than 75% of the group participate

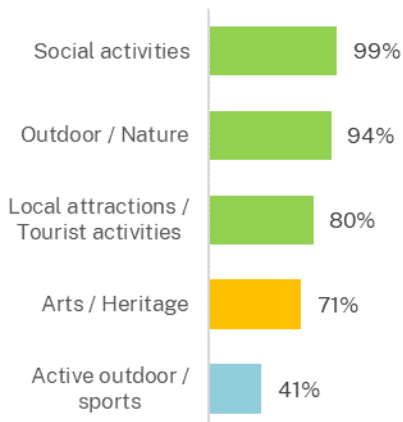
50% - 75% of the group participate

25% - 50% of the group participate

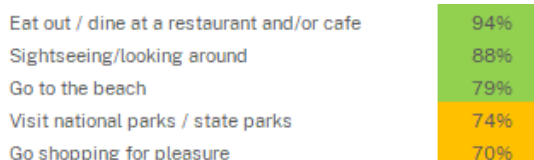
International



Top 5 categories

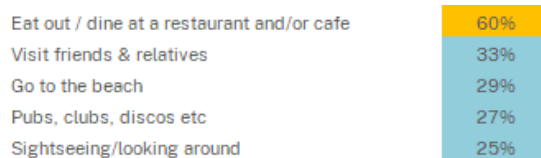
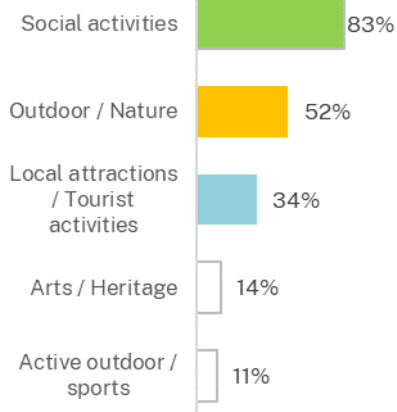


Top 5 activities



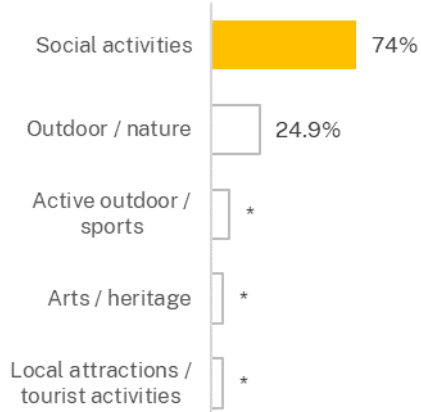
Note: international visitors who visited Southern NSW DN may take these activities somewhere else in Australia.

Domestic Overnight



Source: Tourism Research Australia, NVS.

Domestic Daytrip



Travel to Southern NSW DN 2023 Event



Source: TRA. 2024. Domestic Visitor Survey & International Visitor Survey. YE Dec 2023.

In 2023, Southern NSW DN secured events that delivered **\$203 million** worth of domestic overnight visitor expenditure into the state.

SOUTHERN NSW DN EVENTS DELIVERED:

Domestic Overnight



177

VISITORS
(000)



539

NIGHTS
(000)



\$203

EXPENDITURE
(\$M)



SAMPLE EVENTS SPONSORED BY DNSW IN SOUTHERN NSW DN

Narooma Oyster Festival
Wanderer Festival
Ultra Trail Kosciuszko by UTMB
Giiyong Festival



Note: international and domestic daytrip event data are not publishable for Southern NSW DN. Event data is not specific to DNSW sponsored events. Event visitors refer to those whose purpose of visit to NSW was either to participate in or watch organized sporting events, attend a specific leisure event or festival, attend a convention, conference, seminar, trade fair or exhibition and those accompanying them and/or attend Olympics or Paralympics (domestic visitors only).

Photo Credit: Destination NSW

Travel to Southern NSW DN 2023

Visitations by Tourism Regions

Source: TRA. 2024. Domestic Visitor Survey & International Visitor Survey. YE Dec 2023.



SOUTHERN TABLELANDS

2,927

VISITORS
(000)



2,480

NIGHTS
(000)



\$592

EXPENDITURE
(\$M)



SOUTH COAST

2,748

VISITORS
(000)



5,711

NIGHTS
(000)



\$1,316

EXPENDITURE
(\$M)



* Not available due to low sample size

17

VISITORS
(000)



199

NIGHTS
(000)



\$13

EXPENDITURE
(\$M)



International



42

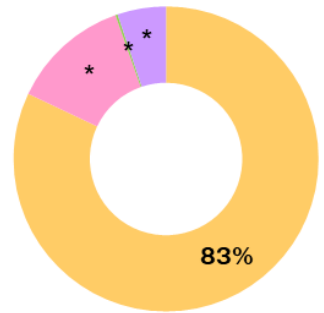
VISITORS
(000)

167

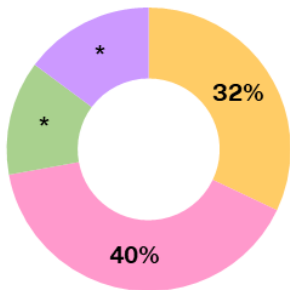
NIGHTS
(000)

\$20

EXPENDITURE
(\$M)



- Holiday
- Visiting friends and relatives
- Business
- Other



1,024

VISITORS
(000)



2,280

NIGHTS
(000)



\$372

EXPENDITURE
(\$M)



Domestic Overnight



1,549

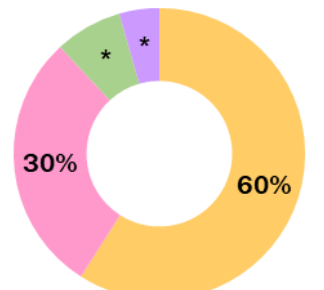
VISITORS
(000)

5,543

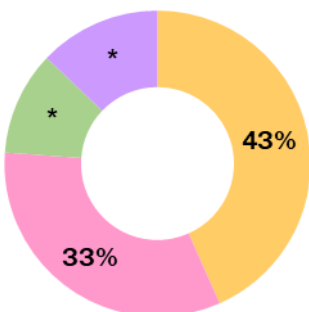
NIGHTS
(000)

\$1,101

EXPENDITURE
(\$M)



- Holiday
- Visiting friends and relatives
- Business
- Other



1,887

VISITORS
(000)



\$206

EXPENDITURE
(\$M)



Domestic Daytrip

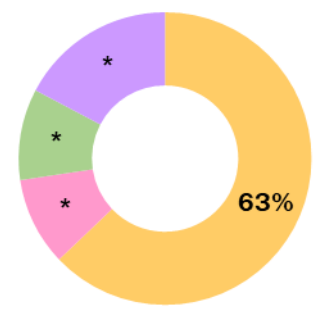


1,157

VISITORS
(000)

\$196

EXPENDITURE
(\$M)



- Holiday
- Visiting friends and relatives
- Business
- Other

Note: data only covers the specific TR areas within this DN.

SNOWY MOUNTAINS

† Total includes unpublishable data (Domestic Daytrip)

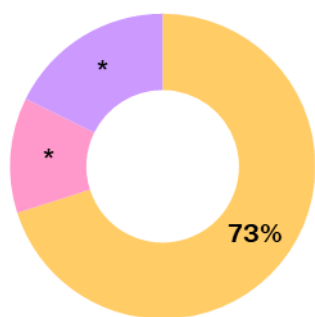
1,127[†]
VISITORS
(000)



2,978
NIGHTS
(000)



\$870[†]
EXPENDITURE
(\$M)



- Holiday
- Visiting friends and relatives
- Other

16
VISITORS
(000)

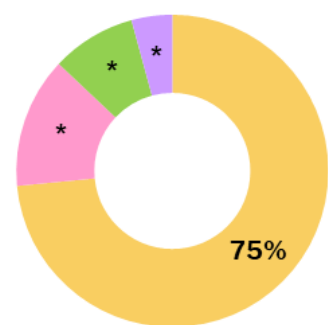


International

342
NIGHTS
(000)



\$16
EXPENDITURE
(\$M)



- Holiday
- Visiting friends and relatives
- Business
- Other

766
VISITORS
(000)



Domestic Overnight

2,636
NIGHTS
(000)



\$768
EXPENDITURE
(\$M)



* Not available due to low sample size

VISITORS
(000)



Domestic Daytrip

EXPENDITURE
(\$M)



SOUTHERN TABLELANDS

TOTAL Southern Tablelands	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	2,927	17	1,024	1,887
Share of SN %	43%	24%	31%	56%
Expenditure (\$ M)	592	13	372	206
Share of SN %	21%	27%	17%	42%

Goulburn Mulwaree LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	971	*	338	627
Share of SN %	14%	-	10%	19%
Expenditure (\$M)	180	*	114	64
Share of SN %	6%	-	5%	13%

Hilltops LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	439	*	149	*
Share of SN %	7%	-	5%	-
Expenditure (\$M)	98	*	48	*
Share of SN %	4%	-	2%	-

Queanbeyan-Palerang Regional LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	543	*	225	*
Share of SN %	8%	-	7%	-
Expenditure (\$M)	126	*	97	*
Share of SN %	5%	-	4%	-

Yass Valley LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	646	*	214	*
Share of SN %	10%	-	7%	-
Expenditure (\$M)	111	*	73	*
Share of SN %	4%	-	3%	-

Upper Lachlan LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	*	*	*	*
Share of SN %**	4%	-	3%	-
Expenditure (\$M)**	57	*	37	*
Share of SN %**	2%	-	2%	-

SOUTH COAST

TOTAL South Coast	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	2,748	42	1,549	1,157
Share of SN %	41%	59%	47%	34%
Expenditure (\$M)	1,316	20	1,101	196
Share of SN %	47%	41%	49%	40%

Bega Valley LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,237	31	661	*
Share of SN %	18%	43%	20%	-
Expenditure (\$M)	644	14	540	*
Share of SN %	23%	28%	24%	-

Eurobodalla LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,574	14	949	611
Share of SN %	23%	19%	29%	18%
Expenditure (\$M)	663	7	551	105
Share of SN %	24%	13%	25%	22%

SNOWY MOUNTAINS

TOTAL Snowy Mountains	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,127	16	766	*
Share of SN %	17%	22%	23%	-
Expenditure (\$M)	870	16	768	*
Share of SN %	31%	32%	34%	-

Snowy Monaro Regional LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,127	16	766	*
Share of SN %	17%	22%	23%	-
Expenditure (\$M)	870	16	768	*
Share of SN %	31%	32%	34%	-

Notes:

- ❑ Total Tourism Region (TR) data covers the TRs areas within the DN boundary.
- ❑ Certain LGAs presented above may be located within multiple TRs. Only 1 table per LGA is provided.
- ❑ Total visitor and expenditure figures are for indicative only if the data (labelled with *) of its certain visitor type is unpublishable.
- ❑ Certain LGAs/TRs within this DN are not listed above due to no publishable data.
- ❑ Visitor and expenditure figures for Upper Lachlan LGA labelled with ** are indicative only and are estimated from share of the total region.