



Destination
Country and Outback NSW

Orana Outlook Forum : The Visitor Economy – an enabler for regional NSW

Acknowledgement of Country

I acknowledge the Traditional Custodians of the lands on which we are meeting today – the Wirajduri people, and pay my respects to Elders past, present and emerging, and celebrate the diversity of Aboriginal Peoples and their ongoing cultures and connections to the lands and waters of NSW.

I also acknowledge and pay my respects to all Aboriginal and Torres Strait Islander People joining us today.

We are privileged to learn from them in the way we care for and share Australia's diverse nature and culture.

Destination Country & Outback NSW

- One of 7 Destination Networks in regional NSW – the conduit or the ‘regional shopfront’ to Destination NSW – the state government agency
- Principal role – represent and co-ordinate growth and development of the Country & Outback visitor economy
- 25 LGAs organized into 3 main sub-regions : Outback NSW, NE North -West and Greater Western Plains
- Board of 5 Directors, contract with Destination NSW, team of 3
- Destination Management Plan 2022 – 2023 linked to 2030 Visitor Economy Strategy

Destination Country and Outback Region



The visitor economy defined – then and now

When valuing tourism, a visitor economy perspective is critical.

- Traditional definitions - leisure visitors
- Now -visiting friends and relatives, business, work, education or medical services
- Identify travellers from a destination perspective
- ‘Visitor economy’ production of goods & services for consumption by visitors
- Direct and indirect industries
- Visitor activity - not isolated
- Provides investment and jobs across industry sectors.

Australian Regional Tourism

Visitor Economy Strategy 2030 at a glance

The NSW Government's vision is to be the premier visitor economy in the Asia Pacific by 2030

PHASES OF THE STRATEGY

Recovery phase to 2024

Total Visitor Expenditure to pre-COVID levels
\$43 Billion
in 2019

Momentum phase to 2026

Total Visitor Expenditure to reach over
\$50 Billion
by 2026

Accelerate phase to 2030

Total Visitor Expenditure to reach
\$65 Billion
by 2030

STRATEGIC PILLARS

Road to recovery

An agile marketing and industry development response to ensure NSW recovers rapidly from the impacts of COVID-19 and natural disasters.

Build the brand

Compelling new brands for Sydney and NSW to build a springboard for differentiation, consumer messaging, and competitiveness.

Showcase our strengths

A laser-sharp focus on our strengths from icons to hidden gems and natural beauty to ensure experience, marketing and events drive visitation.

Invest in world-class events

Accelerated investment in signature sporting & cultural events to grow the visitor economy & position NSW as the events capital of Asia Pacific.

Facilitate growth

The continued growth and future prosperity of the NSW visitor economy through investment in infrastructure, job creation & sustainability.

GUIDING PRINCIPLES

Put the visitor first

Accelerate digital innovation

Lead with our strengths

Move fast, be responsive & agile

Collaborate with industry & government



Destination
Country and Outback NSW

The last few years - a challenge but things are looking up

- Travel restrictions lifted, including cruise protocols.
- Strong support for the visitor economy from local, state and federal government
- International arrivals and airline capacity on the rise – Western Sydney airport 24 hours
- World-class events have set new records e.g. Mundi Mundi Bash's record-breaking Nutbush dance.
- Destination Network DMPs are aligned with NSW Visitor Economy Strategy 2030
- Visitor economy of regional NSW is a strong and vibrant one
- exceeded our 2023 expenditure target despite the 40% impact of COVID

State performance at a glance



105.4m visitors

Compared with 110.8M for year ended June 2019.



\$26.1b regional spend

Up 36.1% on pre-COVID records, exceeding the \$25B target for visitor expenditure in regional NSW.



182.7m visitor nights

International visitors accounted for 67.8M visitor nights, with most staying in Sydney.



66.5m daytrip visitors

24.9M daytrip visitors to Sydney, 41.6M daytrip visitors to regional NSW.



\$48.6b visitor spend

NSW continues to lead the nation in international and domestic overnight visitor expenditure.



\$38.9b overnight spend

Overnight visitation expenditure is equal between regional NSW and Sydney.

Source: Tourism Research Australia International Visitor Survey and National Visitor Survey results YE June 2023

Regional NSW: key metrics

TOTAL DOMESTIC



67.9m visitors

+48.9% YoY



\$25.3b expenditure

+58.8% YoY

DOMESTIC OVERNIGHT TRAVEL



84.8m visitor nights

+27.4% YoY



\$725 per visitor

Average spend



3.2 nights

Average length of stay

DOMESTIC DAY TRIP TRAVEL



41.6m visitors

+56.3%YoY

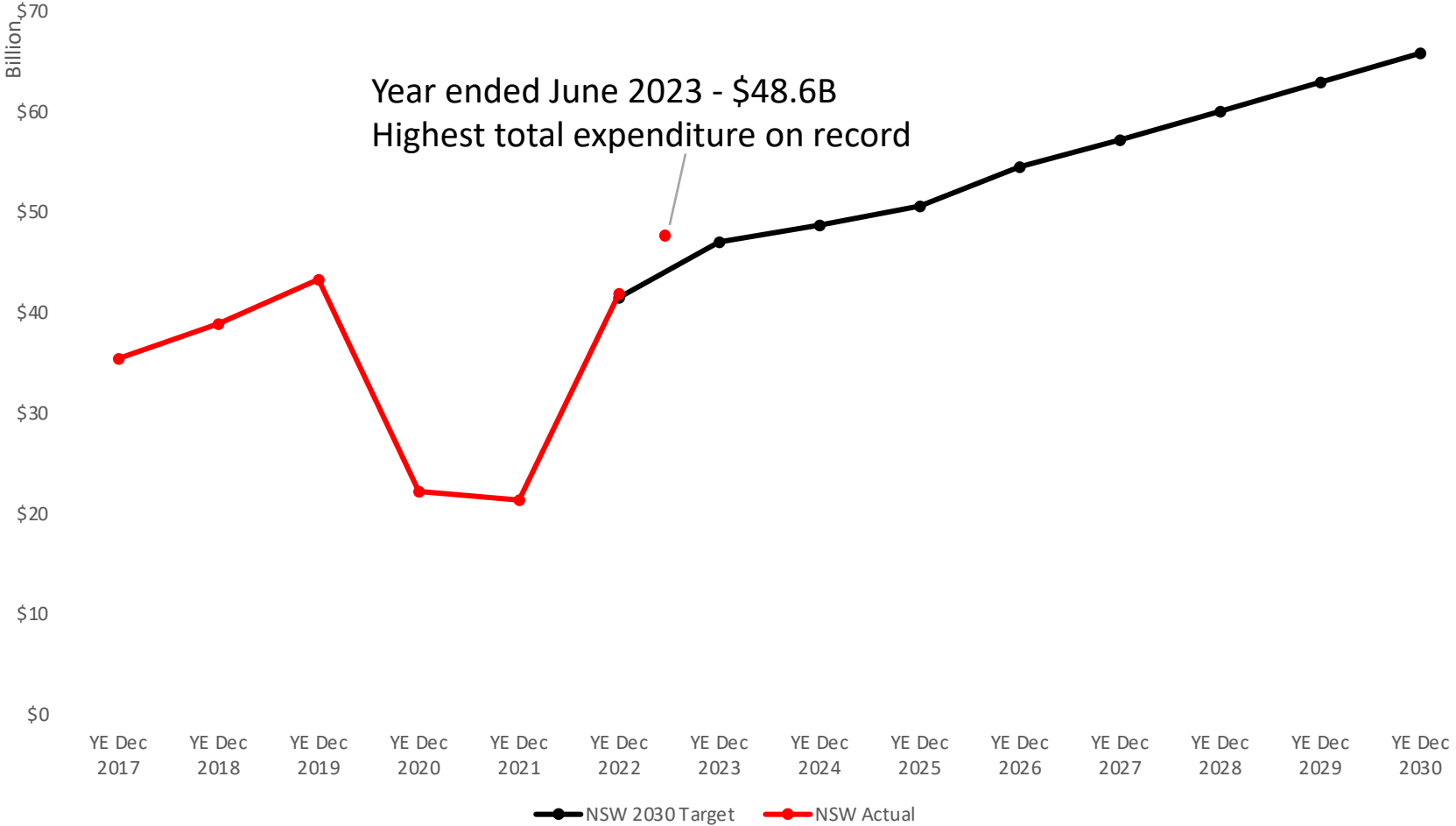


\$148 per visitor

Average spend

Source: Tourism Research Australia National Visitor Survey results year ended June 2023

Total visitor economy value to 2030



Visitor Economy is big business in the DNCO region

- 5.7 million visitors in 2022
- Every year almost \$3 billion spent in this part of our state
- \$6.3 million every day
- Every minute that's \$4351 being spent in someone's business in the region
- Delivers over \$1 billion or 3.6% Gross Added Value
- Increased annually since 2011 at 5.3 %
- 48% overnight visitors spending \$1.3 b
- \$141 per night and staying 2.9 nights
- 52% day / 387% m
- 6.9% of the region's jobs, 5,487 businesses

Greater Western Plains : Research Insights (Destination Marketing Store)

Why:

- Dubbo 65% is the main destination , 24% from Sydney
- eating out & dining 68%
- Nature 15%
- visiting friends and relatives 14% - OPPORTUNITY! They spend more hosting + showcasing
- attractions 18% - zoo, goal, RFDS etc

Who

- Baby Boomers 26%
- Millenials 22%
- Gen X 35%



Global trends – having impacts

- Political uncertainty
- Technology disrupting
- Desire to travel continues to strengthen
- Experiences and wellness
- simplify sustainability
- Regenerative tourism

What you can do to leverage these trends

- Put the visitor first
- Data
- AI
- Hybrid working
- Agritourism

If there's just one thing to do – put the visitor first + map their journey



Invest in the regional visitor economy !

- Invest in the visitor economy
- It provides a platform for jobs & investment
- Tourism gives culture a voice.

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