

# Murray

## Regional Tourism Summary

Year Ending December 2021



The visitor economy has suffered immense losses since the start of the COVID-19 pandemic, with large declines recorded across most top-level measures compared to the pre-pandemic results. However, early signs of recovery are evident as restrictions have been progressively lifted and some measures have improved relative to the performance of 2020 during a period of limited travel.

Tourism is an important industry for the Murray. The region received approximately 4.2 million domestic (overnight and daytrip) visitors, who spent an estimated \$1.0 billion in the year ending December 2021.

The Murray tourism region comprises four tourism sub-regions: Central Murray, Goulburn, Mallee and Murray East.<sup>1</sup>

### GROSS REGIONAL PRODUCT



GRP	% OF ECONOMY
\$980M ▼ -17% y/y	5.9% ▼ -1.4%pts

### VALUE OF TOURISM

In 2019-20, tourism was estimated to be worth \$980 million to the region's economy (in direct and indirect Gross Regional Product) representing 5.9 per cent of the region's economy.

### TOURISM EMPLOYMENT



JOBS	% OF ECONOMY
13,600 ▼ -6% y/y	8.8% ▼ -0.6%pts

Tourism generated employment of approximately 13,600 people or 8.8 per cent of the region's employment (direct and indirect jobs).

### DOMESTIC OVERNIGHT



SPEND	VISITORS
\$775M +30% y/y	1.8M +25% y/y
▼ -29% 2019/21	▼ -31% 2019/21

### DOMESTIC OVERNIGHT SPEND

Domestic overnight expenditure in the Murray in the year ending December 2021 was estimated to be \$775 million, up 30 per cent on 2020 during a period of low activity. However, overnight spend remained 29 per cent below the year ending December 2019 (pre-COVID) result. Visitors spent an average of \$139 per night and \$427 per visitor in 2021.

### DOMESTIC DAYTRIPS



SPEND	DAYTRIPS
\$269M -8% y/y	2.3M -3% y/y
▼ -43% 2019/21	▼ -44% 2019/21

### DOMESTIC DAYTRIP SPEND

Daytrip visitors spent an estimated \$269 million in the year ending December 2021, a decrease of 43 per cent compared to the year ending December 2019.

Growth rates for Gross Regional Product and Employment are year-on-year percentage changes for 2019-20 vs 2018-19.

International visitor data is currently limited to state-level results.

Sources: National and International Visitor Surveys and Regional Expenditure Model, December 2021, Tourism Research Australia (TRA), released March 2022.

Regional Tourism Satellite Account 2019-20, TRA, released July 2021.

Data correct at time of publishing. Factsheet published by the Tourism and Events Strategy and Reform (TESR) Research Unit, March 2022.

Image: The Murray River



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## Key Regional Tourism Statistics

Tourism Economic Contribution	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	YOY change (2019-20) (%)
<b>Gross Regional Product (GRP)</b>							
Direct GRP (\$m)	489	484	540	568	613	519	-15%
Indirect GRP (\$m)	476	462	520	553	572	461	-19%
<b>Total GRP (\$m)</b>	<b>965</b>	<b>946</b>	<b>1,060</b>	<b>1,121</b>	<b>1,185</b>	<b>980</b>	<b>-17%</b>
Direct GRP (%)	3.6%	3.5%	3.7%	3.7%	3.8%	3.1%	-0.7%pts
Indirect GRP (%)	3.5%	3.4%	3.6%	3.6%	3.5%	2.8%	-0.8%pts
<b>Total GRP (%)</b>	<b>7.1%</b>	<b>6.9%</b>	<b>7.3%</b>	<b>7.3%</b>	<b>7.3%</b>	<b>5.9%</b>	<b>-1.4%pts</b>
<b>Persons Employed</b>							
Direct Employment (000s)	9.9	9.4	10.6	11.1	11.1	10.8	-3%
Indirect Employment (000s)	2.7	2.7	3.0	3.2	3.3	2.7	-18%
<b>Total Employment (000s)</b>	<b>12.6</b>	<b>12.1</b>	<b>13.6</b>	<b>14.3</b>	<b>14.4</b>	<b>13.6</b>	<b>-6%</b>
Direct Employment (%)	7.3%	6.8%	7.3%	7.5%	7.2%	7.0%	-0.2%pts
Indirect Employment (%)	2.0%	1.9%	2.1%	2.2%	2.2%	1.8%	-0.4%pts
<b>Total Employment (%)</b>	<b>9.3%</b>	<b>8.7%</b>	<b>9.4%</b>	<b>9.6%</b>	<b>9.4%</b>	<b>8.8%</b>	<b>-0.6%pts</b>

Visitors, Nights and Expenditure	YE Dec 2016	YE Dec 2017	YE Dec 2018	YE Dec 2019	YE Dec 2020	YE Dec 2021	YOY change (YE Dec 2020-21) (%)	2 year change (YE Dec 2019-21) (%)	YE Dec 2021 Share Total
<b>Domestic</b>									
Daytrip visitors (000's)	2,849	3,251	3,355	4,160	2,399	2,335	-3%	-44%	56.2%
Overnight visitors (000's)	2,084	2,459	2,538	2,642	1,449	1,817	25%	-31%	43.8%
Total domestic visitors (000's)	4,933	5,710	5,894	6,802	3,848	4,152	8%	-39%	100.0%
Visitor nights (000's)	5,639	6,403	7,637	8,214	4,560	5,585	22%	-32%	100.0%
Length of stay (nights)	2.7	2.6	3.0	3.1	3.1	3.1			
Daytrip Expenditure (\$m)	341	385	407	474	293	269	-8%	-43%	25.8%
Daytrip spend per trip	120	118	121	114	122	115			
Domestic Overnight Expenditure (\$m)	774	859	1,008	1,098	595	775	30%	-29%	74.2%
Domestic Overnight Spend per Visitor (\$)	371	349	397	416	411	427			
Domestic Overnight Spend per Night (\$)	137	134	132	134	131	139			
Total Domestic Expenditure (\$m)	1,115	1,243	1,414	1,572	889	1,044	17%	-34%	100.0%
<b>International</b>									
Overnight visitors (000's)	61	55	61	61	10	-	-	-	-
Visitor nights (000's)	1,646	1,330	1,841	1,966	-	-	-	-	-
Length of stay (nights)	27.0	24.2	30.2	32.4	-	-			
International Overnight Expenditure (\$m)	91	54	66	96	8	-	-	-	-
International Overnight Spend per Visitor (\$)	1,488	981	1,081	1,586	767	-	-	-	-
International Overnight Spend per Night (\$)	55	41	36	49	-	-	-	-	-

For year ending December 2021, international visitor data is currently limited to state-level results.

Sources: National and International Visitor Surveys and Regional Expenditure Model, December 2021, TRA, released March 2022.

Regional Tourism Satellite Account 2019-20, TRA, released July 2021.

Improvements in the NVS methodology has resulted in a break in series. Please use caution when comparing 2020 and 2021 results with previous time periods and releases.

For further information on methodology changes and impacts refer to the TRA NVS Methodology.

Note: Figures noted as '-' are under the publishable threshold.

Factsheet published by the TESR Research Unit, March 2022



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## <sup>1</sup> Murray Tourism Region definition – SA2s

Each tourism region is defined using smaller geographical building blocks called Statistical Areas Level 2 (SA2s), developed by the Australian Bureau of Statistics. SA2s do not precisely align with the boundaries of Local Government Areas (LGAs). For further information refer:

[https://www.abs.gov.au/websitedbs/D3310114.nsf/home/Australian+Statistical+Geography+Standard+\(ASGS\)](https://www.abs.gov.au/websitedbs/D3310114.nsf/home/Australian+Statistical+Geography+Standard+(ASGS))

The following SA2s are included in the Murray tourism region:

Region	SA2
Central Murray	Cobram, Echuca, Kyabram, Lockington – Gunbower, Moira, Numurkah, Rochester, Rushworth, Yarrowonga
Goulburn	Euroa, Kilmore – Broadford, Mooropna, Nagambie, Seymour, Seymour Region, Shepparton – North, Shepparton – South, Shepparton Region – East, Shepparton Region – West, Wallan
Mallee	Gannawarra, Irymple, Kerang, Merbein, Mildura, Mildura Region, Red Cliffs, Robinvale, Swan Hill, Swan Hill Region
Murray East	West Wodonga, Wodonga

## Regional Map

The Tourism, Events and Visitor Economy (TEVE) branch of the Victorian Government has developed a map noting Victoria's tourism sub-regions as managed by Tourism Research Australia. These definitions form the basis of data reported from the National Visitor Survey and the International Visitor Survey. This document also outlines SA2s and LGAs as they relate to the regions. Refer to:

<https://www.business.vic.gov.au/tourism-industry-resources/research/regional-visitation>

## More Information

For further information on National Visitor Survey methodology changes and impacts refer to the Tourism Research Australia NVS Methodology.

<https://www.tra.gov.au/Domestic/national-visitor-survey-methodology>

For the latest information on domestic visitation to Victoria's regions from the National Visitor Survey by Tourism Research Australia please refer to the results updated quarterly by TEVE at:

<http://www.business.vic.gov.au/tourism-industry-resources/research/domestic-and-regional-research>

Further information on international visitors to Victoria's regions from the International Visitor Survey by Tourism Research Australia is also updated quarterly by TEVE and available at:

<http://www.business.vic.gov.au/tourism-industry-resources/research/international-research>

Refer to the [TRA website](#) for information on how estimates for international visitors have been produced in the absence of survey data since the June 2020 quarter.

For further information on the methodology and key concepts for the Regional Tourism Satellite Accounts 2019-20, please refer to:

<https://www.business.vic.gov.au/tourism-industry-resources/research/economic-significance>

For more detail on the State Tourism Satellite Accounts 2019-20, published by Tourism Research Australia refer to the full report:

<https://www.tra.gov.au/economic-analysis/economic-value/state-tourism-satellite-account/state-tourism-satellite-account>

Due care is taken in the production of this factsheet, however DJPR accepts no responsibility for use of this information.