Destination Country and Outback NSW

DESTINATION MARKETING STORE

TRAVELLERS' PULSE

DNCO NSW VISITOR RESEARCH INSIGHTS 2024

TOP 20 RESEARCH INSIGHTS

1. Over the past 5 years[1] the DNCO network area has averaged 5.8 million visitors per year.
   a. Overnight visitors comprised 50% of visitors and contributed approx. $1.4 billion per year.
   b. Day visitors comprised 49% and contributed approx. $429 million per year.
   c. International visitors comprise less than 1% and contributed approx. $40 million per year.

2. Average total visitor expenditure is estimated at $1.9 billion per year.

3. New England North West averaged the highest volume of visitors 3.37 million = 58% of the total network area.

4. Greater Western Plains averaged 1.7 million visitors = 29% of the total network area.

5. Outback NSW averaged 0.7 million visitors = 13% of the total network area.

6. An average of **8.5 million** nights were spent in the region per year, with 47% spent in private and 53% in commercial accommodation.

7. Domestic overnight average increased from $153 per night in 2019 to $210 in 2023.

8. Average night stay was 2.9 nights, NENW= 2.8 nights; GWP = 2.4 nights; Outback = 4.0 nights.

9. International markets recovering to pre-covid levels in 2023 at 46,000 visitors.

10. Drive tourism segment is essential as 95% drive to the network area.

11. By volume, Sydney is the largest segment for the total network (18% of all overnight visitors).

12. The network area shows dominance of three segments **Baby Boomer couples, Gen X families and Gen X couples.** Each data hub attracts these three segments.

13. Reasons for overnight travel are mixed and include **VFR (29%), holiday (37%)**.

14. Business travel is a strong segment for the region (28% overnight visitors).

15. **55%** of overnight visitors; 43% day visitors undertake **Culinary tourism activities**.

16. **21%** of overnight visitors; 11% day visitors undertake **Nature activities**.

17. **14%** of overnight visitors; 5% day visitors undertake **Cultural and creative activities.**

18. **8%** of overnight visitors; 4% day visitors undertake **Agritourism activities.**

19. Domestic overnight visitation increased 15% from 2022-2023.

20. Current annual visitation is approx. **6.7 million** as at December 2023.

[1] TRA (2019-2023) Domestic visitors year-end Sept 2023 NVS data

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SECTION ONE NETWORK LEVEL RESULTS

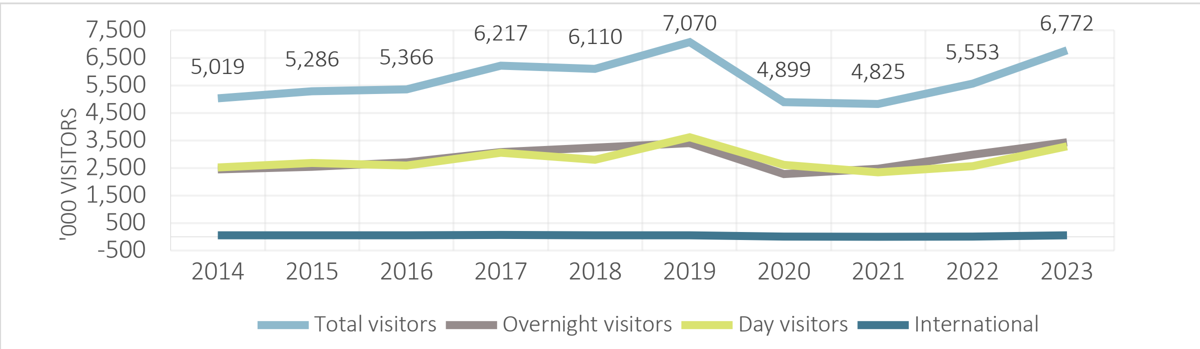
Visitation overview

This research report aims to provide analysis and insight into visitors to the Country Outback network area using data supplied by Tourism Research Australia from their NVS and IVS surveys as well as other relevant data sources. Initial review of TRA data has shown the following visitation patterns for the whole **Country Outback Destination Network (DNCO)** over the past five years, highlighting the continued recovery from the impacts of Covid_19 travel restrictions.

For the period 2019 to 2023[2] it was found that:

- Total visitation averaged 5.8 million per year.
- Overnight visitors comprise 49% of visitors spending an average of **8.5 million nights** per year. and contributing approx. $1.4 billion per year.
- Day visitors comprise 51% and contribute approx. $429 million per year.
- International visitors comprise 1%, and contribute approx. $40 million per year.
- Visitor expenditure has averaged $1.9 billion per year.
- Domestic overnight average of $169 per night.
- Domestic average night stay is 2.9 nights.

Over a 10-year timeframe, visitation to the DNCO had been steadily increasing to reach **7.0 million visitors** in December 2019. However as shown, the impact from COVID_19 and related travel restrictions caused a total dip in visitation of 32% to a low of 4.82 million in 2021[3]. Since that time, visitation has rebounded to approximately 6.77 million visitors per year (4% shy of the 2019 high).



Source: TRA: NVS database (2014-2023)

Almost half of visitors are domestic overnight visitors, with 47% staying in private and 53% in commercial accommodation. The average night stay of 2.9 nights is less than the Regional NSW average (3.2 nights) for that period.

Recent data shows the potential for increases in domestic overnight visitors with **15% overall growth from 2022-2023**.

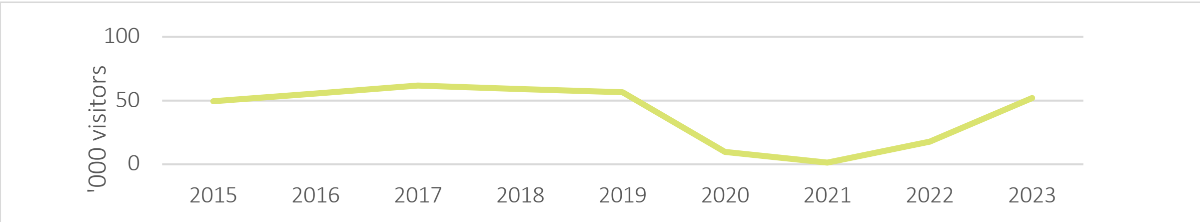
Overnight Visitors Y/E Dec 2023 '000	Overnight Visitors	% change on previous year	Total nights stayed	Average length of stay
Outback NSW	604	-2%	2,548	4.2
Greater Western Plains	971	39%	2,255	2.3
New England North West	1,857	12%	5,072	2.7
Total	3,432	15%	9,875	2.9

[2] TRA visitor survey. Calendar Year data. 2019 to 2023

[3] TRA visitor survey. Calendar Year data. 2019 to 2023

International markets

Data for international visitors has been made available for 2023, having been unavailable in 2020-2022 as a result of Covid-19 border closures. The number of international travellers averaged 60,000 per annum before 2020 - comprising 1% of total visitation. In 2023, TRA recorded 46,000 visitors to the network area, suggesting international visitation is recovering and is likely to return to previous levels in 2024-25. Key generating regions in 2023 included NZ (17%), UK (16%) and USA (12%).



Visitor summary

As shown below, the market segments for each data hub are different in size and composition with each contributing to the total DNCO region. Using a five-year average (2019-2023) it was found:

- New England/North West recorded approx. 3.3 million visitors = 58% of the total network area.
- Great Western Plains attracted 1.7 million visitors = 29% of the total network area.
- Outback NSW attracted 0.7 million visitors = 13% of the total network area.

These variances are reflected in the economic contribution of each data hub, with NENW providing 42% of the $1.9 billion total network contribution.

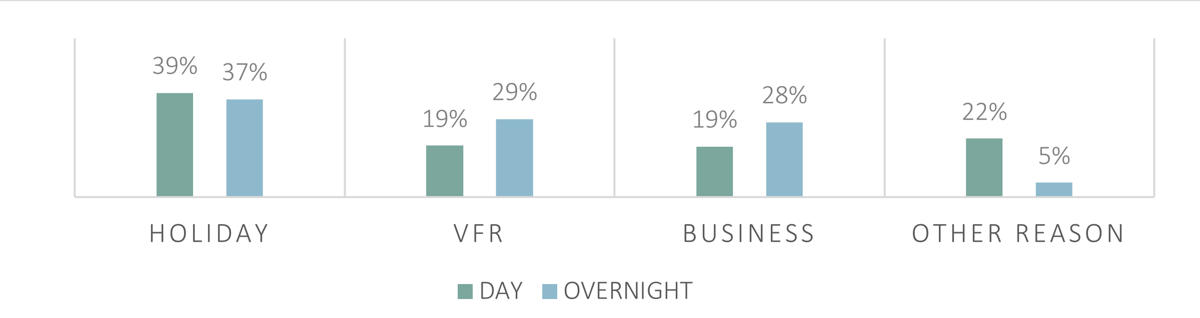
5-year average (2019-2023)		# Visitors '000	% of network visitation	$ contribution	$ per night^
Network area	Domestic overnight	2,911	50%	$1,435 m	$169
	Domestic day	2,882	49%	$429 m	$149
	International	31	1%	$40 m	$50
	Total	5,824	100%	$1,904 m	
Outback	Domestic overnight	553	10%	$327 m	$148
	Domestic day *	213	3%	$26 m	$123
	International	6	<1%	$5 m	$46
	Total	771	13%	$358 m	
New England & North West	Domestic overnight	1,544	27%	$689 m	$158
	Domestic day	1,811	31%	$274 m	$151
	International	18	<1%	$33 m	$57
	Total	3,373	58%	$996 m	
Greater Western Plains	Domestic overnight	814	14%	$384 m	$202
	Domestic day	858	15%	$148 m	$173
	International	7	<1%	$5 m	$46
	Total	1,679	29%	$537m	

Source: TRA NVS and IVS data. 5-year average 2019-2023. DNSW time series (2019-2023)
* Small sample size for day visitors

Reason for travel

Across the whole network area, the main reason for travel is holiday/leisure (39% DAY and 37% ONITE), although VFR (29%) and business travel (28%) are also strong overnight segments.

High rates of 'other' day travel relate to medical appointments as well as personal appointments. This is often significant as medical visitors are likely to shop or dine in the same trip/destination.



Overnight VFR travel is strongest in the NENW data hub where 35% of overnight visitors are there for that reason. VFR is not as popular in Outback hub (19%). The high rate of business travel is common across the network and offers opportunities to extend into B-leisure (extending activities in the area) and B-leverage (extending activities to family).

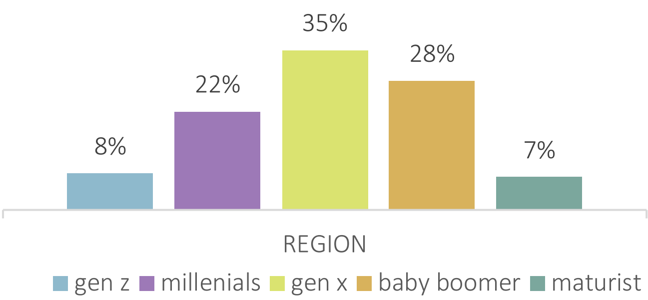
2023	Outback		New England North West		Greater Western Plains		NETWORK AREA	
	Overnight	Day	Overnight	Day	Overnigh t	Day	Overnight	Day
Holiday	43%	46%	34%	33%	38%	32%	37%	39%
VFR	19%	15%	35%	17%	26%	16%	19%	19%
Business	36%	34%	26%	16%	27%	9%	28%	19%
Other	3%	6%	4%	34%	9%	43%	5%	22%

Source: TRA NVS data for year-end December 2023

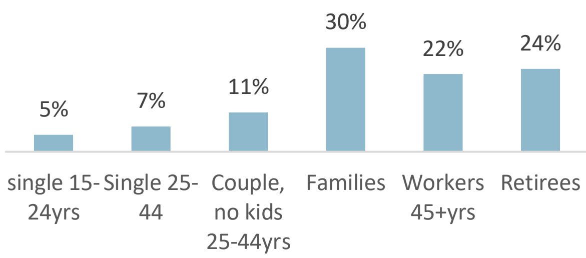
Age and Lifecycle segments

The data from 2023 suggests the main lifecycle segments for overnight visitors continues to be families and retiree couples. These align with dominance of **Gen X (1964-1980)** and **Baby Boomers (1946-64)** as shown below. However, it is interesting to note prominence of **45+workers** in the TRA data which contributes to the larger **Gen X** segment. This also reflects the strength of the Business Sector discussed above.

Generation Segments (Age)



TRA Lifecycle Segments



Analysis of the age, generation and purpose of visit allows the identification of three main segments which can be further targeted for marketing as well as for infrastructure and experience development. The characteristics and behaviours of these three segments are further explored in Stage Two of the research.

Boomer couples

Exploring somewhere new
Pack the car and go
Flexible timing
Sharing with partner and friends
Bucket list itinerary
Safe/soft adventure
Gems and surprises
Quality regional food and wine
VFR
Safety first
Considers distance & activities

Gen X Families

Exploring somewhere new
Jam-packed itinerary
School holiday fun
Safe/soft adventure
Sharing with family
Somewhere safe for the kids
Good value food for kids and adults
Consider distance & accomm
Visiting family
Safe accommodation

Business Traveller

Suitable accommodation
Desks, chairs and USB charging
Great Wi-Fi & lighting
Easy breakfast
Safe parking
Walk to dinner
Personal service
Recognition as regular guest

Accommodation choices

Around half of visitors use commercial accommodation including hotels, motels, resort and guesthouses; while 47% use private accommodation such as homes of VFR and free-camping. The NENW has a higher ratio of Private Accommodation users than the other hubs.

2023	Outback	New England North West	Greater Western Plains	NETWORK AREA
Commercial	56%	46%	62%	53%
Private	44%	54%	37%	47%

Note: TRA does not track visitor use of Air BnB.
Source: TRA NVS data for year-end December 2023

Trends in travel experiences

Visitors to the region explore numerous niche experiences within the total visitor experience. The region offers a wide variety of niche experiences which highlight the landscapes and culture of the region. Visitors looking for these experiences can be as first-timers or enthusiasts looking for either quick or immersive experiences. Between 2019-2023, key experience themes included Culinary tourism, Agritourism, Arts and Creative tourism, and the nature of Gondwana.

Culinary tourism

Culinary tourism involves exploring food as the central focus of travel. Both for foodies and for general travellers, “dining out” is the most frequent activity in all market segments. In 2023, dining at a restaurant or café accounted for **55% of overnight visitor and 43% of day visitor activities** Other culinary activities not included here are incidental dining at gallery cafes or other venues and attractions; or attending wine or food festivals.

Nature of Gondwana experiences

Nature experiences include a multitude of individual activities, many of which are beyond the scope of reporting by TRA. Whether it be general activities such as driving and sightseeing through a forest or individual activities such as fishing, mountain biking, stargazing or 4WDing. These activities are not easily accounted for in the TRA survey. Yet we know, for example that 1.2 million people visited NPWS parks in the Northern Inland Branch area in 2022, and a further 1.2 million people visited the West Branch[4]. Individual Parks can be a great attraction with 467,000 people visiting Warrumbungle National Park in 2020 and 150,000 people visiting Mungo National Park in 2020.

A shown below, activities that are recorded by TRA include bushwalking, visiting parks/gardens and enjoying Aboriginal tours, performances and activities. The popularity of these experiences in the network area is shown here as a percentage of day and overnight visitors. Using the available TRA data we can conservatively estimate that these combined **nature and outdoor activities accounted for 21% of overnight, and 11% of day activities.**

2019-2023	Visit national parks / state parks	Visit parks and gardens	Bushwalking	Indigenous experiences
DAY	6%	2%	3%	<1%
OVERNIGHT	10%	3%	11%	2%

Cultural and creative tourism

Cultural and creative tourism accounts for 14% of overnight visitor activities comprising the following specific experience categories within the TRA survey data. Other popular activities such as viewing silo artwork or town murals is not currently recorded and would boost this ratio higher.

2019-2023	Visit museums or art galleries	Visit heritage sites or buildings	Attend festivals / events	Attend theatre, concerts
DAY	2%	1%	1%	1%
OVERNIGHT	6%	5%	2%	<1%

Agritourism

Agritourism accounts for 8% of overnight activities comprising the following specific experience categories within the TRA survey data. However the figures do not account for experiencing the rural landscape by driving through fields and generally appreciating the rural landscape.

[4] www.environment.nsw.gov.au/topics/parks-reserves-and-protected-areas/park-management/park-visitor-survey. Some parks are outside the Country Outback tourism network area.

2019-2023	Visit farms	Visit food and produce markets	Visit wineries	Visit breweries
DAY	1%	1%	1%	<1%
OVERNIGHT	3%	3%	1%	1%

Hub Activity Comparisons

Activity trends are similar across the data hubs, with some differences noted between hubs:

- Nature and Agritourism is a key activity in the New England hub
- Cultural and Creative tourism is a key activity in the Outback data hub
- Tourist attractions are the key activity in the Greater Western Plains data hub (250,000 visitors to Taronga Western Plains Zoo per annum).

This is important to understanding the unique selling points of each hub within the region- which are uniquely different to each other. It is also related to the unique experiences of each hub, further explored in the DNCO Experience Analysis Research.

2019- 2023	Outback		New England North West		Greater Western Plains		Network area	
	Over night	Day	Over night	Day	Over night	Day	Over night	Day
Agritourism	6%	7%	9%	4%	6%	2%	7%	3%
Gondwana & Nature	22%	18%	23%	13%	17%	7%	21%	11%
Culture & creative	26%	11%	12%	5%	10%	3%	10%	5%
Culinary tourism	48%	24%	48%	40%	50%	33%	50%	36%
Festivals and events	4%	4%	7%	5%	3%	1%	5%	4%
Tourist attractions	15%	3%	7%	2%	18%	5%	12%	3%

** visitors undertake more than one activity - % add up to over 100%

Drive tourism

Drive tourism is all encompassing trend that must be considered in the region as over 95% of visitors drive to the network area. This signifies the importance of understanding the needs and aspirations of the Drive Tourism market for both hard and soft infrastructure - in both roads and towns as well as visitor servicing and information. In particular, it is worth considering the following visitor flows in the network area:

- Intra-region travel – a high volume of visitors resides within the network area (75% day visitors, 22% overnight) travelling *between and within* data hubs (see green shaded cells in table below).
- Inter-state visitors tend to visit towns on the edges of the network area more than the interior. For example, Outback receives 14% of overnight visitors from VIC, where NENW receives 5%.

The size and location of the network area facilitates visitation from multiple directions. The table below shows the importance of the Sydney segment, however as shown its importance varies greatly for data hubs. There are also marked differences in **interstate** target segments, with Qld being a primary segment for some hubs except the Outback, which clearly has more visitors from Victoria than Queensland, as well as attracting visitors from SA and WA.

2019-2023 Average	Outback		New England North West		Greater Western Plains		NETWORK AREA	
	Over night	Day	Over night	Day	Over night	Day	Over night	Day
NSW	64%	95%	72%	96%	75%	99%	72%	97%
Sydney	15%	3%	17%	3%	24%	5%	18%	3%
Outback	11%	57%	1%	1%	7%	12%	4%	8%
GWP	7%	18%	3%	2%	7%	45%	5%	17%
NE/NW	3%	3%	16%	76%	4%	2%	11%	49%
Central NSW*	7%	6%	2%	2%	9%	31%	5%	9%
Hunter	4%	2%	11%	8%	7%	3%	8%	6%
North Coast	4%	-	13%	4%	4%	-	8%	3%
Riverina	1%	4%	1%	-	2%	1%	1%	1%
Other NSW^	12%	2%	8%	0%	11%	0%	12%	1%
QLD	9%	2%	20%	4%	11%		14%	3%
VIC	14%	2%	5%		10%		7%	<1%
ACT	1%	1%	1%		2%		1%	
SA	11%		1%		2%		3%	
WA	1%				1%			

Source: TRA NVS data: data for 2019-23 average
*Note: New Central NSW hub boundary used.
^ includes Blue Mountains, Capital Country, Central Coast, Snowy Mountains, South Coast, The Murray

Economic contribution of visitation to the network area

Analysis of TRA visitor expenditure data (2019-2023) suggests visitors contribute an average of $1.90 billion per year to the network area in direct expenditure[5]. The following is also noted:

- Expenditure is mostly from Overnight Visitors who contribute an average of $1.4 billion per year; however day visitors also contribute an average of $429 million per year.
- There is a high volume of visitors travelling within the network area (75% day visitors, 22% overnight intra-region travel) which circulates existing money within the network area, and between data hubs.
- The average overnight expenditure (2019-2023) ($169) has increased in the past year, but remains lower than other areas in Regional NSW which is $181[6].
- The return of the international market contributed a total of $40 million per year in 2023.

DNCO 5-year av 2019-2023	International	Domestic overnight	Domestic day	Total
Visitors (000)	31	2,911	2,882	5,824
Nights (000)	799	8,483	-	9,282
Average stay (nights)	25.8	2.9	-	
Expenditure ($M)	40	1,435	429	$1,904
Av spend per night	$50	$169	$149	

Outlook

TRA suggest softening of the domestic market in 2023-2028[7] to increases of around 2-3% per year. However, the continued interest in regional tourism and events could well see visitor numbers continue to rise. TRA expects expenditure to continue to rise, however visitors may be looking for **better value** in Country Outback NSW than they can find on the coast. Providing value for targeted key segments identified in this document may be the best strategy moving forward for each hub and the network area as a whole.

[5] (Average 2019-2023)

[6] DNSW (2023) Regional NSW Visitor Profile - Year ended June 2018, 19,20,21,22, 23.

[7] TRA (2023) Tourism forecasts for Australia 2023-2028

Destination Country and Outback NSW

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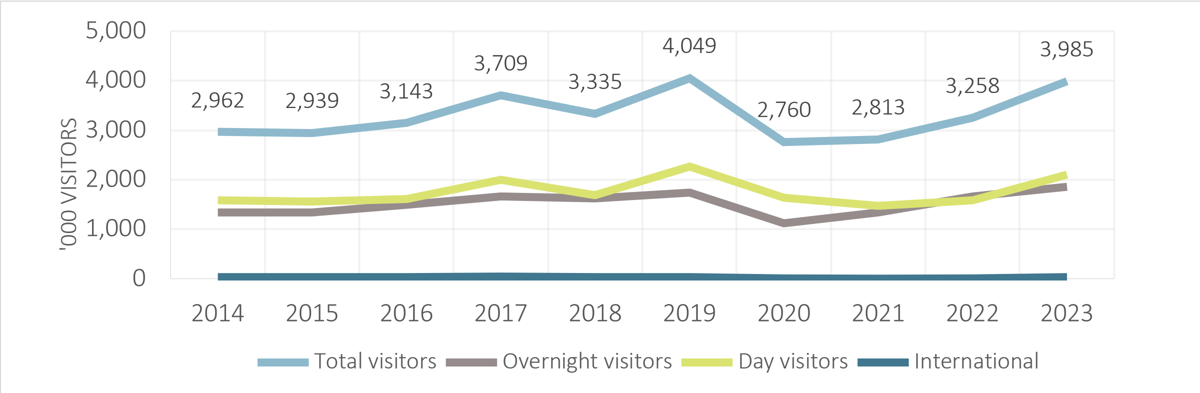
SECTION TWO HUB LEVEL RESULTS

Data hub: New England North West

Trend data (2014-2023) shows visitation to NENW had been steadily increasing to **4.0 million visitors** in 2019. Following the decrease during COVID_19 there has been a sustained recovery toward peak visitation. The chart below highlights the equal strength of both overnight and day visitors to the area.



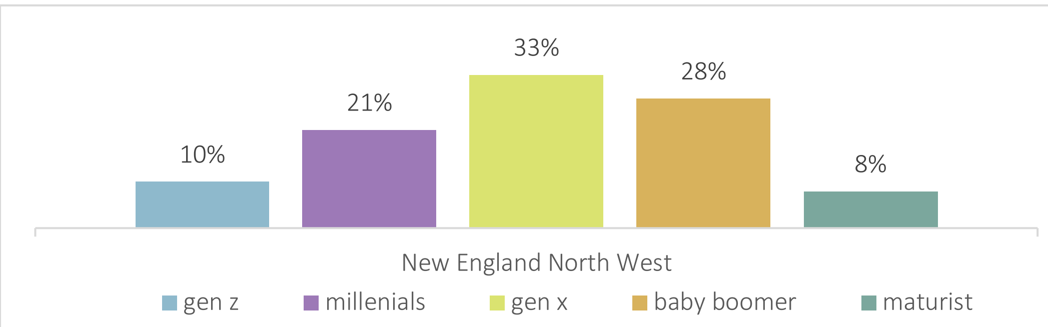
Source: TRA: NVS database (2014-2023)

Over the past 5 years, overnight segments provided less visitors, but more economic impact, at an average of $689m per year. Key results for overnight visitors:

- Tamworth is the main destination attracting 31% of overnight visitors in the data hub
- 72% of overnight visitors come from NSW, 20% Qld and 5% Vic.
- Sydney is a key segment (17%), with North Coast (13%) and Brisbane (9%)
- Overnight markets are seeking dining (48%) and nature experiences (22%).

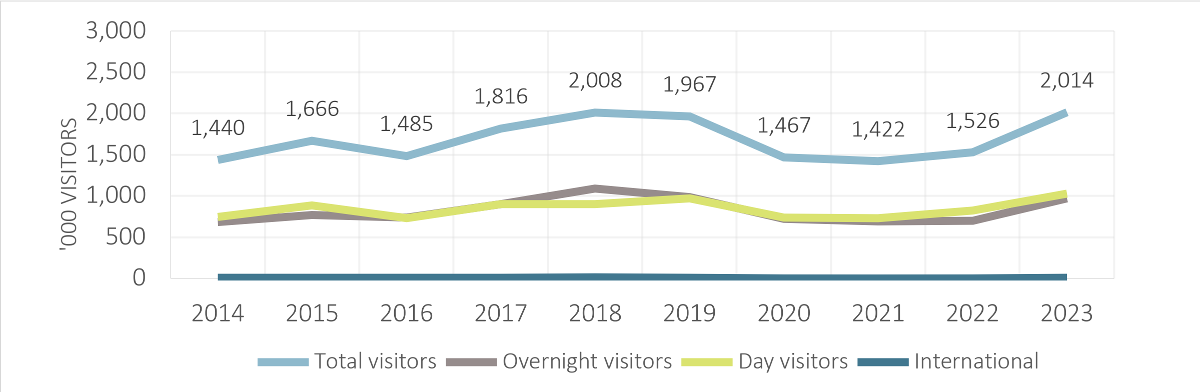
Average 2019-2023	# Visitors	% of total	$ contribution	Domestic $per night	Av night stay
Domestic overnight	1544	46%	$689 m	$158	2.8
Domestic day	1811	53%	$274 m	$151	
International	18	1%	$33 m	$57	32.0
Total	3373	100%	$996 m		

Visitors in both day and overnight markets comprise Gen X families and Business travellers along with Baby Boomer retirees. NE/NW receives more Millennials (21%) than other parts of the network.



Data hub: Greater Western Plains

Trend data (2014-2023) shows visitation to GWP had been steadily increasing to **2.0 million visitors** in 2019 before the impact from COVID_19. Recent gains have seen the area return to this level with increases in both overnight and day visitors.



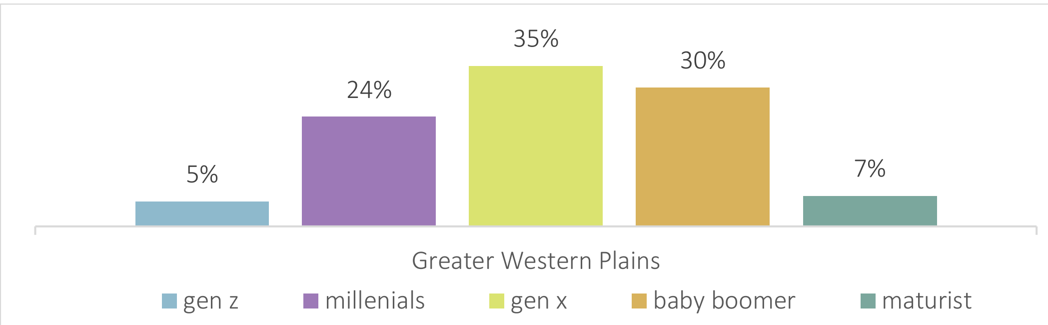
Source: TRA: NVS database (2014-2023)

While both overnight and day segments show similar volumes, overnight visitors create stronger economic impact at an average of $384m per year. Key results for overnight visitors:

- Dubbo is the main destination attracting 68% of overnight visitors in the data hub.
- 75% of overnight visitors come from NSW, 10% Qld and 9% Vic.
- Sydney (24%) is a key segment for overnight visitors
- Overnight markets seek dining (50%) and nature experiences (17%) with solid interest in tourist attractions (18%) e.g. TWP zoo, Dubbo Gaol, RFDS etc.

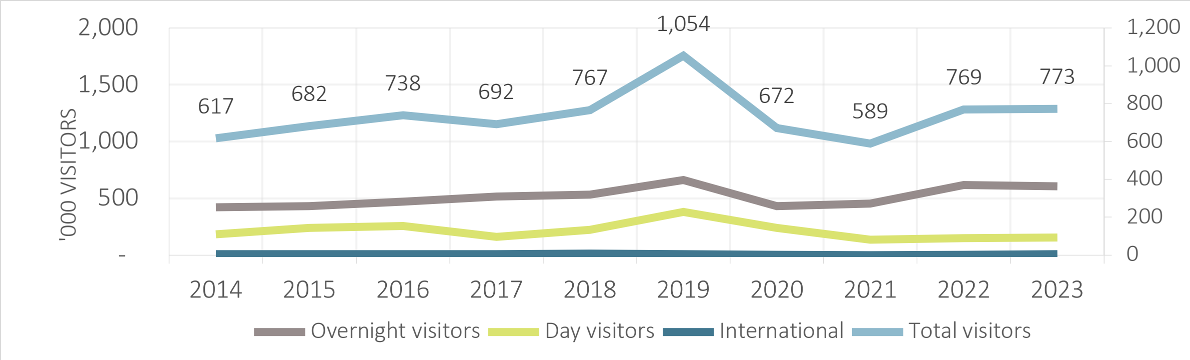
Average 2019-2023	# Visitors	% of total	$ contribution	Domestic $per night	Av night stay
Domestic overnight	814	49%	$384 m	$202	2.3
Domestic day	858	51%	$148 m	$173	
International	7	<1%	$5m	$46	16.4
Total	1679	100%	$537m		

Visitors in both day and overnight markets comprise Gen X families and 45+ workers along with Baby Boomer retirees.



Data hub: Outback NSW

Trend data (2014-2023) shows visitation to Outback NSW has been steadily increasing back toward the high of 2019. The Outback has a strong overnight market providing 72% of visitors and 84% of economic contribution.



201: TRA: NVS database (2014-2023)

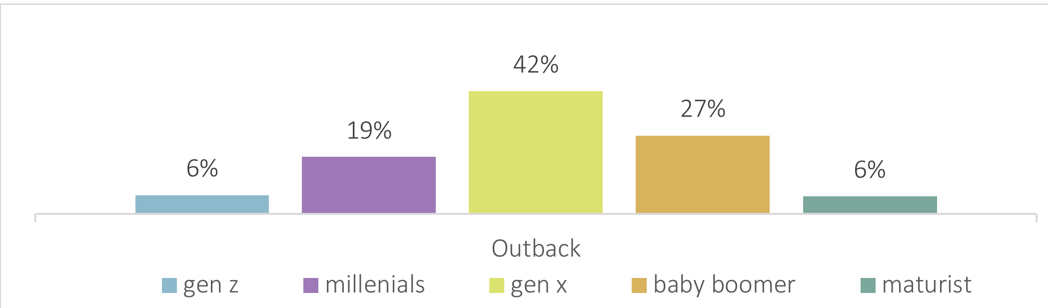
TRA data for **Day Visitors** has a very small sample size and therefore has not been reported by TRA or DNSW as they are statistically too small. As an ***indicator***, it is possible to assess the average number of day trippers over the past 10 years as being approx. 200,000 per year, with most of these visitors coming from within the DNCO network area (60%) often for the purpose of business (30%)[8].

Overnight visitors are the priority market with most visitors from within NSW (64%) and Victoria (14%), as well as SA (11%) and QLD (9%).

- Broken Hill is the main destination attracting 38% of overnight visitors to the data hub.
- Sydney (15%) is a key segment for overnight visitors along with intra-region (e.g. Dubbo)
- Overnight visitors seek dining (48%) and nature (22%) as well as pub/clubs (32%). There is a higher interest in Cultural creative experiences (26%) than other hubs.

Average 2019-2023	# Visitors	% of total	$ contribution	Domestic $ per night	Av night stay
Domestic overnight	553	72%	$327 m	$148	4.0
Domestic day	213	28%	$26 m	$123	
International	6	<1%	$5 m	$46	16.5
Total	771	100%	$358 m		

Visitors in both day and overnight markets comprise Gen X (working families and couples) along with Baby Boomers (60+ couples). Outback receives more Baby Boomers than other parts of the network.



[8] Low sample sizes mean this information should be considered trends rather than statistics.

Appendix 1: Methodology

Project area

The Country Outback Network Area covers an extensive area of NSW, from Tenterfield in the north to Dubbo in the south, and Broken Hill in the west, incorporating 26 local government areas (LGA). Boundaries to this network area were changed as of July 2022, causing differences in visitation patterns as described in this report.

Source: https://www.dnconsw.com.au/

The large size of the destination network has made it necessary to break down the area into three Data Hubs to examine relevant and practical information. These data hubs have been previously defined within the 2022-2030 Destination Marketing Plan to identify differences and commonalities between different parts of the network. Data for each hub was downloaded using ArcGis[9] to examine LGA, Tourism and SA2 boundaries as defined within the DNSW Destination Network Boundaries[10]. Data for this report is thus presented for each hub as well as for the Destination Network area as a whole.

Outback NSW	New England & North West	Greater Western Plains
Broken Hill City Council, Bourke Shire Council, Bogan Shire Council, (Nyngan) Brewarrina Shire Council, Central Darling Shire Council, Cobar Shire Council, Walgett Shire Council Unincorporated Far West Region of NSW	Armidale Regional Council, Tamworth Regional Council, Inverell Shire Council, Glen Innes Severn Council, Gwydir Shire Council, Moree Plains Council, Liverpool Plains Shire Council, Narrabri Shire Council, Gunnedah Shire Council, Tenterfield Shire Council, Uralla Shire Council, Walcha Council	Coonamble Shire Council, Dubbo Regional Council, (Wellington) Gilgandra Shire Council, Narromine Shire Council, Warren Shire Council, (Warren) Warrumbungle Shire Council (Coonabarabran)

[9] https://www.destinationnsw.com.au/our-industry/destination-networks

[10] https://www.arcgis.com/home/webmap/

Data analysis

Data for this report has been downloaded from the TRA National Visitor Survey and International Visitor Survey and reanalysed by staff at Destination Research. TRA conducts statistically reliable surveys of domestic travellers for travel undertaken throughout Australia to provide a pattern of where visitors are travelling and how much that travel is worth to the economy.

TRA data has known issues particularly when analysing smaller segments of visitors coming to regional areas - where the sample size is small the results can be unreliable. In some areas t**he research is therefore considered an indication of visitor trends rather than actual performance measures.**

Despite the slight variations in smaller segments of data the TRA data is the most reliable source of visitor data available, showing historical data over the past 10 years. The best indicator of the reliability of TRA data is the consistency of the results over time. As shown in this report, the ratios of tourists, their activities and accommodation etc remains constant over both five and ten year timeframes. It is important however to seek further research into specific market segments before basing planning, development or investment decisions on TRA data alone.

Where possible this is cross-checked with published statistics, and data compiled by DNSW and other tourism organisations.

I. The analysis utilises TRA subscription data, with most analysis using a five-year average between 2017-2021. This range accounts for both the years of high visitation of 2017-9 and years of Covid impacts in 2020 and 2021.
II. Analysis in this report also uses a ten-year time series to examine trends over time using a calendar year to December 2021. Other analysis by the TRA is undertaken using year-end in September, March and June, providing slightly different reporting of "yearly" results.
III. TRA data is analysed in statistical areas (SA2) which when combined make up the total LGA. These have then been combined to create a data set for each hub as indicated.
IV. Visitor expenditure data for individual local government areas (LGA), or statistical areas (SA2) is provided yearly by the TRA based on the average of the previous four years.
V. In 2018, TRA revised methods for collecting and analysing international data. This caused some small changes to previously published data. Revised estimates for data prior to 2018 have been included in this report.
VI. Sample sizes for each data set are shown in this report and it is acknowledged that the data derived from TRA surveys are subject to sample error. The likelihood of sample error is explained by TRA and should be read before drawing any conclusions or inferences, or taking any action, based on the data. Further information on the methodology used by TRA can be sourced at http://www.tra.gov.au/aboutus/international-visitor-survey-methodology.html