



Destination North Coast NSW

The Value of Tourism to North Coast 2022



**Every minute of every day,
Tourism delivers \$10,423 of
domestic visitor spend into
North Coast**

**That is \$15.0 million per day!!
A value that has grown by 33.5%
in the last year alone.**

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

This year the number of domestic visitors to the North Coast DN is 11.6 million or 23 per cent below the pre-Covid period (year 2019), but 19 per cent above the 2021 visitation level.



Tourism delivers **10.8%** of our jobs, supports **8,457** businesses and directly delivers **5.9%** of our region's Gross Value Add (GVA) which has grown every year since 2010/11 at an average **2.5%** 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 filled jobs 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 filled jobs 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 11,887

PART TIME 16,046

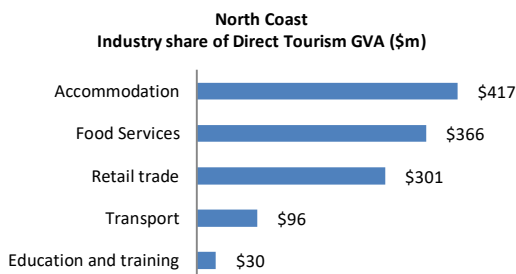


Supporting our local economy, Tourism supplies 10.8% of the region's employment including 27,933 persons who are directly employed and a further 7,674 who are indirectly employed.

There are 8,457 tourism related businesses in North Coast DN, around 22% of all Regional NSW Tourism businesses.

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

REGIONAL BUSINESSES RELYING ON TOURISM



Economically, tourism businesses directly deliver \$1.5 billion (5.9%) of the region's GVA – over 81% 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	\$	\$
North Coast	Dec-2022	323	10,661	3,871	2,459	63.5%	580	236	150
	%Ch on 2021	-2.1%	0.4%	0.7%	19.4%	10.0 ppts*	28.7%	7.8%	27.9%

*percentage point change

Source: STR Tourist Accommodation, 2022

North Coast DN has over 320 accommodation establishments with a room stock of over 10,600 (for establishments with ten rooms or more).



Domestic direct inbound flights have increased in 2022 with a total of 10,472 flights (+36.2% yoy) delivering 858,576 seats (+29.2% yoy).

Source: Official Airline Guide OAG

Notes:

- 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).

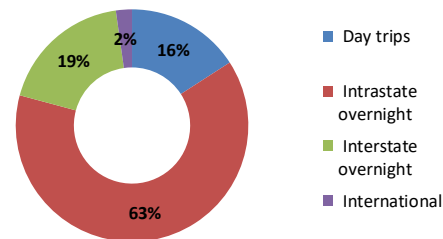


North Coast DN is **Number 1 DN** in terms of Domestic Visitor nights and Expenditure!

ECONOMIC VALUE OF TOURISM

North Coast DN represents about 20% of the state's Tourism Consumption. This is mostly delivered by Intrastate tourism to the Region. North Coast has a substantial Domestic tourism market.

North Coast \$5.2 b* Share of DN consumption



*FY 2020-2021 tourism consumption data

North Coast DN domestic visitation has grown 54% since 2016 in terms of visitor expenditure value.

NORTH COAST DN TOTAL DOMESTIC

11,616

VISITORS
(000)



21,178

NIGHTS
(000)



\$5,479

EXPENDITURE
(\$M)



TRAVEL TYPE

ORIGIN

Domestic Overnight

Source: Tourism Research Australia, National Visitor Surveys.



5,564

VISITORS
(000)



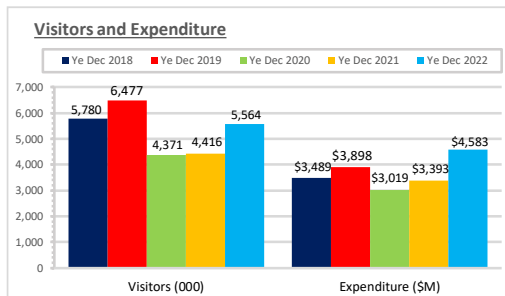
21,178

NIGHTS
(000)



\$4,583

EXPENDITURE
(\$M)



Origin	Share of Visitors		Share of Expenditure	
	YE Dec 2021	YE Dec 2022	YE Dec 2021	YE Dec 2022
Regional NSW	40.4%	36.6%	28.7%	34.0%
Sydney	30.3%	27.5%	45.5%	29.7%
Total Intrastate	70.7%	64.1%	74.2%	63.8%
Queensland	21.7%	26.3%	14.3%	22.3%
Victoria	5.5%	6.5%	9.2%	9.5%
ACT	*	1.4%	*	1.4%
Other Interstate	1.4%	1.8%	1.6%	3.0%
Total Interstate	29.3%	35.9%	25.8%	36.2%

Domestic Daytrip

Source: Tourism Research Australia, National Visitor Surveys.



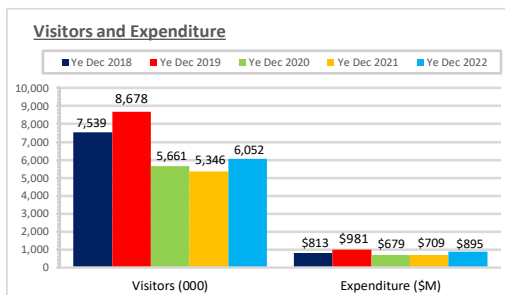
6,052

VISITORS
(000)



\$895

EXPENDITURE
(\$M)



Origin	Share of Visitors		Share of Expenditure	
	YE Dec 2021	YE Dec 2022	YE Dec 2021	YE Dec 2022
Interstate	16.6%	24.9%	17.6%	16.8%
Intrastate	83.4%	75.1%	82.4%	83.2%

Note:

☐ Items with * are available but not statistically reliable.



NORTHERN RIVERS

5,766

VISITORS
(000)



8,731

NIGHTS
(000)



\$2,663

EXPENDITURE
(\$M)



MID NORTH COAST*

6,065

VISITORS
(000)



12,248

NIGHTS
(000)



\$2,751

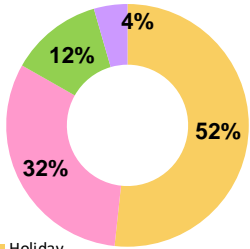
EXPENDITURE
(\$M)



Note: Purpose of visit shares provided only when statistically reliable

TRAVEL TYPE

Domestic Overnight



■ Holiday
■ Visiting friends and relatives
■ Business
■ Other

2,474

VISITORS
(000)



8,731

NIGHTS
(000)



\$2,206

EXPENDITURE
(\$M)



3,305

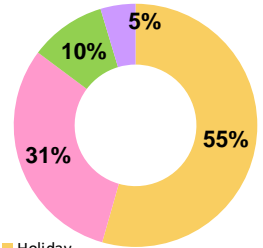
VISITORS
(000)

12,248

NIGHTS
(000)

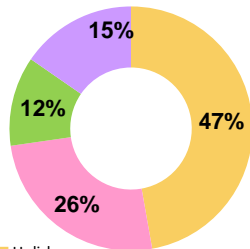
\$2,312

EXPENDITURE
(\$M)



■ Holiday
■ Visiting friends and relatives
■ Business
■ Other

Domestic Daytrip



■ Holiday
■ Visiting friends and relatives
■ Business
■ Other

3,292

VISITORS
(000)



\$456

EXPENDITURE
(\$M)

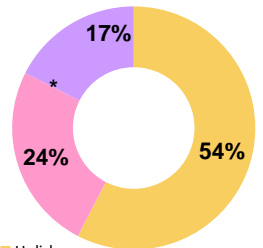


2,760

VISITORS
(000)

\$439

EXPENDITURE
(\$M)



■ Holiday
■ Visiting friends and relatives
■ Business
■ Other

Source: Tourism Research Australia, National Visitor Surveys

Notes:

- Items with * are available but not statistically reliable.
- Mid North Coast includes the Mid-Coast LGA part of the Hunter region.



Events deliver visitors, visitor nights and visitor spend into North Coast DN

In 2022, North Coast DN has secured events that have delivered \$362 million worth of domestic visitor expenditure into the state.



NORTH COAST DN EVENTS DELIVERED...

Domestic Overnight



255

VISITORS
(000)



822

NIGHTS
(000)



\$298

EXPENDITURE
(\$M)



Domestic Daytrip



446

VISITORS
(000)



\$64

EXPENDITURE
(\$M)



Source: Tourism Research Australia, National Visitor Survey.

SAMPLE OF NORTH COAST EVENTS

- Australian Surf Rowers
- Bluesfest
- Chillifest
- NSW Pro Surf Series
- National Touch league



Photo Credit: Destination NSW.



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	60%	42%
Go to the beach	50%	19%
Visit friends & relatives	34%	24%
Pubs, clubs, discos etc	28%	10%
Sightseeing/looking around	26%	15%
Bushwalking / rainforest walks	21%	7%
Go shopping for pleasure	20%	19%
Visit national parks / state parks	15%	10%
Fishing	8%	*
Go to markets	7%	*
Exercise, gym or swimming	7%	*
Surfing	5%	*
Go on a daytrip to another place	5%	n/a
Water activities / sports	5%	*
Visit museums or art galleries	5%	*
Cycling	4%	*
Play other sports	4%	*
Golf	4%	*
Picnics or BBQs	4%	*
Visit history / heritage buildings, sites or monuments	3%	*
Visit food markets	3%	*
Attend theatre, concerts or other performing arts	3%	*

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?

NORTH COAST DN TOTAL DOMESTIC

11,616

VISITORS
(000)



21,178

NIGHTS
(000)



\$5,479

EXPENDITURE
(\$M)



NORTHERN RIVERS

TOTAL Northern Rivers	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	5,766	2,474	3,292
Share of NC %	50%	44%	54%
Expenditure (\$M)	\$2,663	\$2,206	\$456
Share of NC %	49%	48%	51%

Ballina (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	832	313	519
Share of NC %	7%	6%	9%
Expenditure (\$M)	\$443	\$369	\$75
Share of NC %	8%	8%	8%

Byron (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	1,452	713	739
Share of NC %	13%	13%	12%
Expenditure (\$M)	\$889	\$794	\$95
Share of NC %	16%	17%	11%

Clarence Valley (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	920	550	369
Share of NC %	8%	10%	6%
Expenditure (\$M)	\$409	\$344	\$64
Share of NC %	7%	8%	7%

Lismore (C)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	629	164	465
Share of NC %	5%	3%	8%
Expenditure (\$M)	\$117	\$58	\$60
Share of NC %	2%	1%	7%

Richmond Valley (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	226	133	*
Share of NC %	2%	2%	-
Expenditure (\$M)	\$74	\$66	*
Share of NC %	1%	1%	-

Tweed (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	1,707	649	1,058
Share of NC %	15%	12%	17%
Expenditure (\$M)	\$718	\$567	\$152
Share of NC %	13%	12%	17%

MID NORTH COAST**

TOTAL Mid North Coast**	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	6,065	3,305	2,760
Share of NC %	52%	59%	46%
Expenditure (\$M)	\$2,751	\$2,312	\$439
Share of NC %	50%	50%	49%

Bellingen (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	337	135	*
Share of NC %	3%	2%	-
Expenditure (\$M)	\$85	\$69	*
Share of NC %	2%	2%	-

Coffs Harbour (C)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	1,384	799	585
Share of NC %	12%	14%	10%
Expenditure (\$M)	\$747	\$637	\$110
Share of NC %	14%	14%	12%

Kempsey (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	529	311	*
Share of NC %	5%	6%	-
Expenditure (\$M)	\$206	\$182	*
Share of NC %	4%	4%	-

Mid-Coast (A)**	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	2,386	1,360	1,026
Share of NC %	21%	24%	17%
Expenditure (\$M)	\$940	\$747	\$193
Share of NC %	17%	16%	22%

Nambucca (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	287	171	*
Share of NC %	2%	3%	-
Expenditure (\$M)	\$123	\$111	*
Share of NC %	2%	2%	-

Port Macquarie-Hastings (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	1,429	816	613
Share of NC %	12%	15%	10%
Expenditure (\$M)	\$650	\$566	\$84
Share of NC %	12%	12%	9%



Source: Tourism Research Australia, National Visitor Survey.

Note:

- ❑ Items with * are available but not statistically reliable
- ❑ Kyogle LGA is part of Northern Rivers TR. Data for this LGAs are available but not statistically reliable.
- ❑ Mid North Coast includes the Mid-Coast LGA part of the Hunter region.
- ❑ North Coast DN also includes other Unincorporated areas for which data are available but not statistically reliable.