



Destination
North Coast NSW

The Value of Tourism to North Coast 2023



**Every minute of every day,
Tourism delivers \$11,697
of total visitor spend into
North Coast DN**

**That is over \$16.8 million per day!
A value that has grown by 19.5%
since year ended (YE) December 2019.**

**In 2023, there were 12.8 million total visitors to the North Coast DN,
18 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 **7.8%** of jobs, supports **8,240** businesses and directly delivers **5.8%** of the region's Gross Value Add (GVA) which has grown at an average rate of **3.6%** 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.

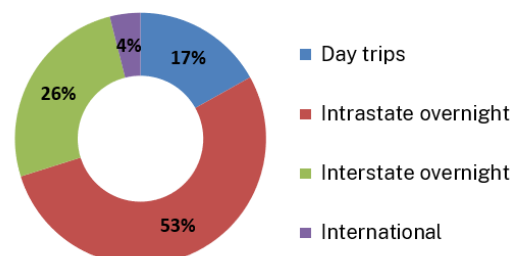
Source: TRA. 2024. Tourism Investment Monitor FY2022-23

ECONOMIC VALUE OF REGIONAL TOURISM

Tourism consumption in North Coast DN represents about 13% of NSW's tourism consumption, which was mostly delivered by the intrastate market.

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

North Coast \$6.2 bn
Share of DN consumption



REGIONAL TOURISM EMPLOYMENT & BUSINESSES

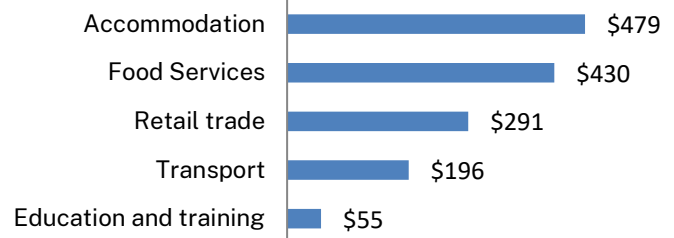
Tourism's DIRECT Contribution to Employment

FULL TIME 10,845

PART TIME 11,989



NC DN - Industry share of Direct Tourism GVA (\$m)



Supporting our local economy, the tourism sector supplied 7.8% of the region's employment including 22,834 persons who are directly employed and a further 11,969 indirectly.

There were 8,240 tourism related businesses in North Coast DN, around 21% of all the 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 \$1.8 billion (5.8%) of the region's GVA – 81% of which was from Accommodation, Food Service, Retail, Transport and Education 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	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	343	11,059	4,054	2,484	61.3%	603	243	149	
Coast DN	%Ch on 2022	2.7%	1.4%	2.3%	-2.2%	-2.8 ppts*	-2.0%	0.1%	-4.2%

*percentage point change

North Coast DN has 343 commercial accommodation establishments with 11,059 rooms.

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

AVIATION



Domestic direct inbound flights to North Coast DN have declined in 2023 with a total of 9,632 flights (-8.3% YoY) delivering 798,004 seats (-7.5% YoY).

Note: airports operating commercial flights in this DN are Ballina (BNK), Coffs Harbour (CFS), Grafton (GFN), Lismore (LSY), Lord Howe Island (LDH), Port Macquarie (PQQ) & Taree (TRO).

Source: Cirium. Jul 2024. SRS Analyser. 2023.

Travel to North Coast DN 2023

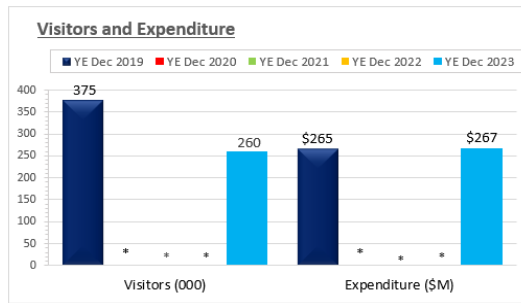
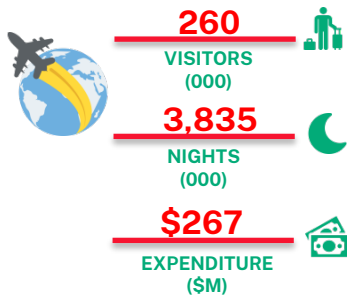
DN Visitation Overview

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

- Total visitors to North Coast DN was **18% lower** than the YE Dec 2019 level.
- Visitor expenditure has **grown 20%** since YE December 2019.
- North Coast is the **No. 1 DN for visitor nights and spend.**



International

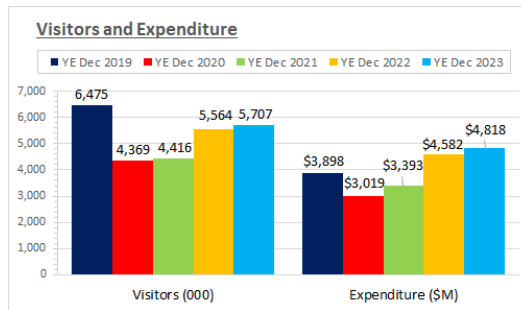
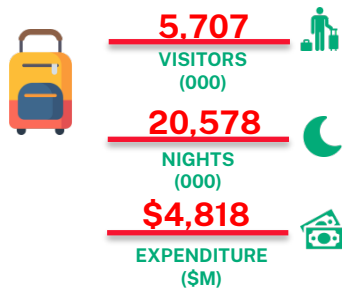


Share of International visitors to North Coast DN

Top Origin	Share of Visitors		Share of Expenditure	
	YE Dec 2019	YE Dec 2023	YE Dec 2019	YE Dec 2023
UK	18.3%	20.9%	16.3%	17.8%
New Zealand	9.6%	13.8%	8.6%	13.1%
Germany	10.8%	9.9%	5.1%	6.1%
USA	8.5%	7.7%	7.2%	5.5%
Canada	3.9%	6.7%	3.3%	6.6%

Origin Region	Share of Visitors	
	YE Dec 2019	YE Dec 2023
Europe	54.6%	53.8%
North America	12.4%	14.5%
Asia	16.4%	12.7%
Other Countries	16.6%	19.0%

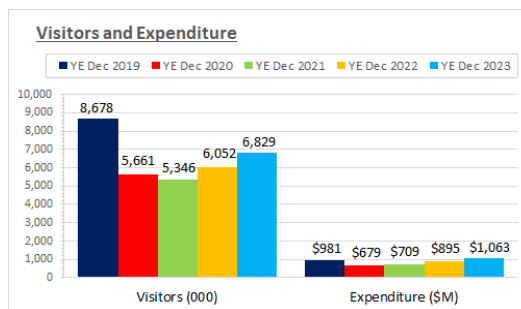
Domestic Overnight



Share of Domestic Overnight visitors to North Coast DN

Origin	Share of Visitors		Share of Expenditure	
	YE Dec 2022	YE Dec 2023	YE Dec 2022	YE Dec 2023
Regional NSW	36.6%	40.7%	34.0%	39.7%
Sydney	27.5%	25.8%	29.7%	29.3%
Total Intrastate	64.1%	66.5%	63.8%	69.1%
Victoria	6.5%	4.8%	9.5%	6.3%
Queensland	26.3%	25.1%	22.3%	19.3%
ACT	*	*	*	*
Other Interstate	1.8%	*	3.0%	*
Total Interstate	35.9%	33.5%	36.2%	30.9%

Domestic Daytrip



Share of Domestic Daytrip visitors to North Coast DN

Origin	Share of Visitors		Share of Expenditure	
	YE Dec 2022	YE Dec 2023	YE Dec 2022	YE Dec 2023
Interstate	24.9%	27.6%	16.8%	19.4%
Intrastate	75.1%	72.4%	83.2%	80.6%

Top Things-to-do

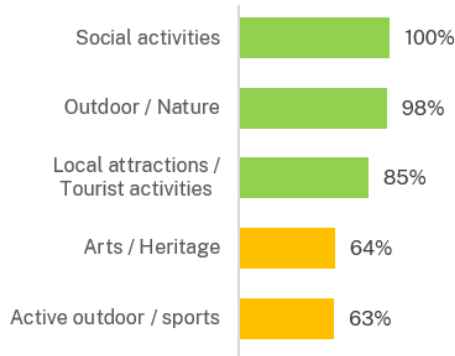
Source: TRA. 2024. Domestic Visitor Survey & International Visitor Survey. YE Dec 2023.



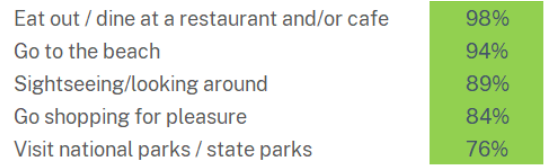
International



Top 5 categories

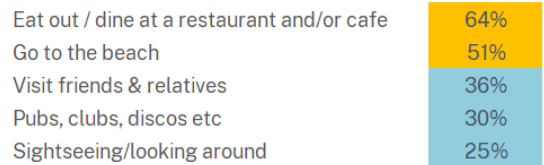
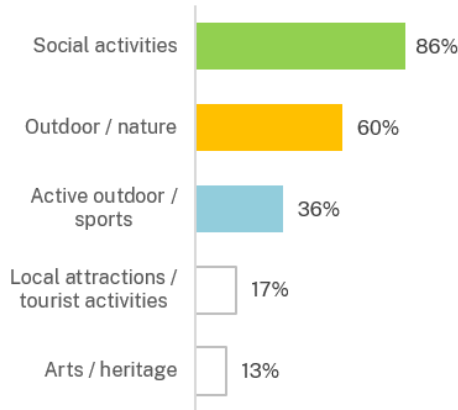


Top 5 activities

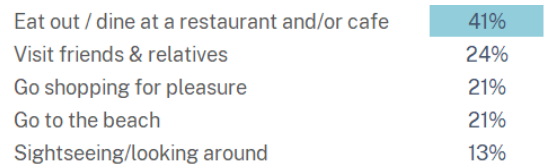
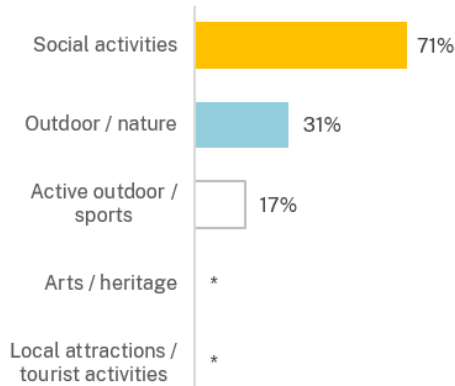


Note: international visitors who visited North Coast DN may take these activities somewhere else in Australia.

Domestic Overnight



Domestic Daytrip



In 2023, North Coast DN secured events that delivered **\$370 million** worth of domestic overnight visitor expenditure into the state.

NORTH COAST DN EVENTS DELIVERED:

Domestic Overnight



\$370

EXPENDITURE (\$M)



299

VISITORS (000)



981

NIGHTS (000)



SAMPLE EVENTS SPONSORED BY DNSW IN NORTH COAST DN

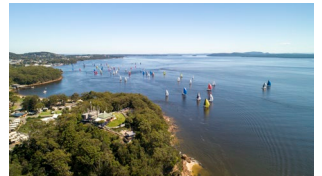
Ironman Australia

Australian Surf Championships

Bluesfest

Woolgoolga Curryfest

Grafton Jacaranda Festival



Note: International and domestic daytrip event data are not publishable for North Coast 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

NORTHERN RIVERS

6,775

VISITORS
(000)



10,237

NIGHTS
(000)



\$2,877

EXPENDITURE
(\$M)



MID NORTH COAST

6,295

VISITORS
(000)



13,984

NIGHTS
(000)



\$3,145

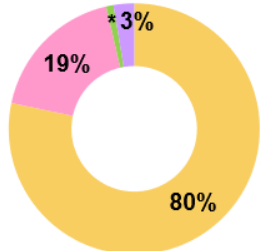
EXPENDITURE
(\$M)



Note: Purpose of visit shares provided only when statistically reliable

TRAVEL TYPE

International



193

VISITORS
(000)



1,821

NIGHTS
(000)



\$156

EXPENDITURE
(\$M)



110

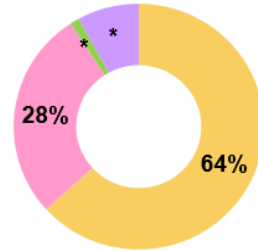
VISITORS
(000)

2,014

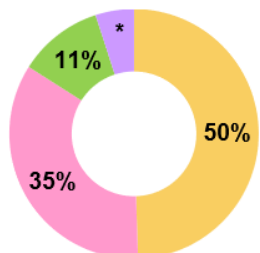
NIGHTS
(000)

\$112

EXPENDITURE
(\$M)



Domestic Overnight



2,586

VISITORS
(000)



8,416

NIGHTS
(000)



\$2,233

EXPENDITURE
(\$M)



3,352

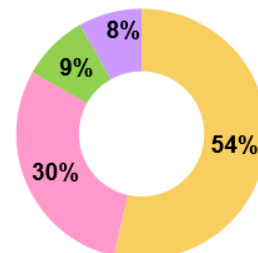
VISITORS
(000)

11,970

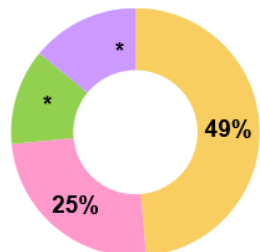
NIGHTS
(000)

\$2,458

EXPENDITURE
(\$M)



Domestic Daytrip



3,996

VISITORS
(000)



\$488

EXPENDITURE
(\$M)

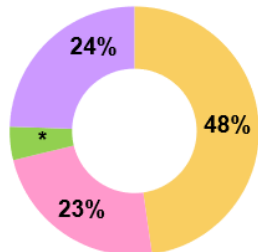


2,833

VISITORS
(000)

\$575

EXPENDITURE
(\$M)



Travel to North Coast DN 2023

Visitations by LGA

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

NORTHERN RIVERS

TOTAL Northern Rivers	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	6,775	193	2,586	3,996
Share of NC %	53%	74%	45%	59%
Expenditure (\$M)	\$2,877	\$156	\$2,233	\$488
Share of NC %	47%	58%	46%	46%

Ballina LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	976	12	424	540
Share of NC %	8%	5%	7%	8%
Expenditure (\$M)	\$548	\$10	\$470	\$69
Share of NC %	9%	4%	10%	6%

Byron LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,624	149	746	729
Share of NC %	13%	57%	13%	11%
Expenditure (\$M)	\$982	\$110	\$754	\$118
Share of NC %	16%	41%	16%	11%

Clarence Valley LGA	Total Overnight	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	593	16	577	*
Share of NC %	10%	6%	10%	-
Expenditure (\$M)	\$434	\$7	\$427	*
Share of NC %	9%	3%	9%	-

Lismore LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	734	6	*	*
Share of NC %	6%	2%	-	-
Expenditure (\$M)	\$146	\$10	*	*
Share of NC %	2%	4%	-	-

Richmond Valley LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	427	*	*	*
Share of NC %	3%	-	-	-
Expenditure (\$M)	\$112	*	*	*
Share of NC %	2%	-	-	-

Tweed LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,914	23	609	1,282
Share of NC %	15%	9%	11%	19%
Expenditure (\$M)	\$575	\$17	\$407	\$151
Share of NC %	9%	6%	8%	14%

Kyogle LGA	Data for Kyogle LGA is not publishable			
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MID NORTH COAST

TOTAL Mid North Coast**	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	6,295	110	3,352	2,833
Share of NC %	49%	42%	59%	41%
Expenditure (\$M)	\$3,145	\$112	\$2,458	\$575
Share of NC %	51%	42%	51%	54%

Bellingen LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	295	*	179	*
Share of NC %	2%	-	3%	-
Expenditure (\$M)	\$114	*	\$103	*
Share of NC %	2%	-	2%	-

Coffs Harbour LGA	Total Overnight	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	930	52	878	*
Share of NC %	16%	20%	15%	-
Expenditure (\$M)	\$676	\$59	\$617	*
Share of NC %	13%	22%	13%	-

Kempsey LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	742	*	315	*
Share of NC %	6%	-	6%	-
Expenditure (\$M)	\$340	*	\$280	*
Share of NC %	6%	-	6%	-

Mid-Coast LGA**	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	2,079	12	1,221	846
Share of NC %	16%	5%	21%	12%
Expenditure (\$M)	\$827	\$8	\$709	\$110
Share of NC %	13%	3%	15%	10%

Nambucca LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	333	*	216	*
Share of NC %	3%	-	4%	-
Expenditure (\$M)	\$131	*	\$121	*
Share of NC %	2%	-	3%	-

Port Macquarie-Hastings LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,684	53	801	829
Share of NC %	13%	20%	14%	12%
Expenditure (\$M)	\$903	\$27	\$628	\$248
Share of NC %	15%	10%	13%	23%

Notes:

- ❑ Total Tourism Region (TR) data covers the TR 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 may not be listed above due to no publishable data.