



# COVID Tourism Impact

## *What we know so far*

North Coast Tourism Symposium  
June 24, 2021

*Peter Doran, Director Performance Assessment & Strategy*



# Agenda

## *What we know so far*

### What has happened?

#### Data Views

1. Traditional Visitation Data (Tourism Research Australia)
2. Jobs
3. STR Accommodation
4. Inside Airbnb Analysis

### What changes are evident?

Trends – Identified or Indicated

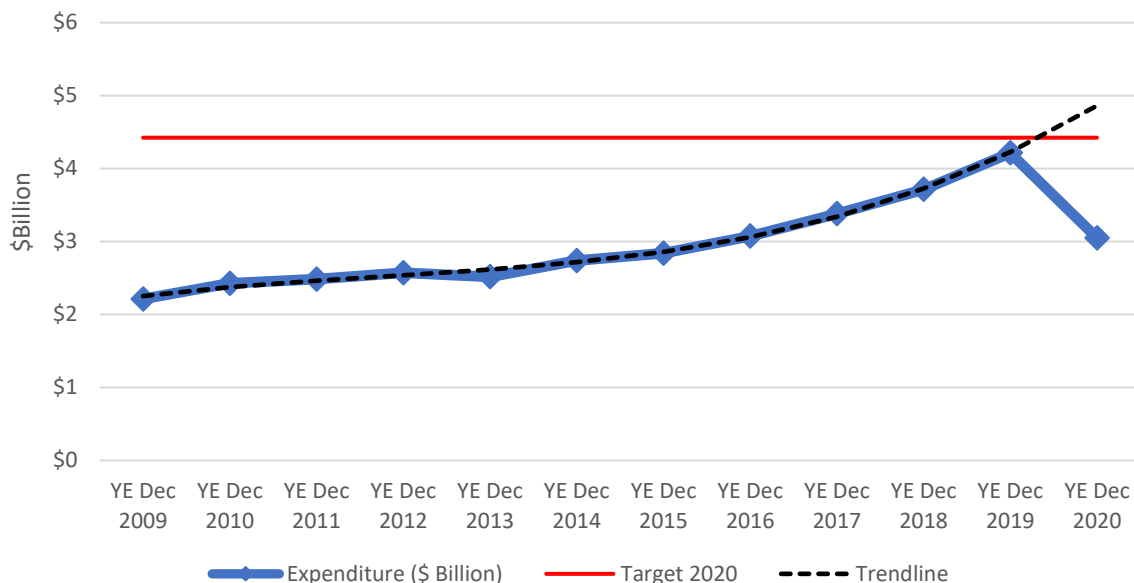


# Overview

What do we know from official Visitation statistics.

In 2009 NSW joined other states to achieve the goal of **“Double the (2009) value of overnight visitation by 2020”**

### North Coast Target 2020 Performance



North Coast became Regional NSW’s number 1 region for domestic overnight visitors, nights and expenditure

**AND**

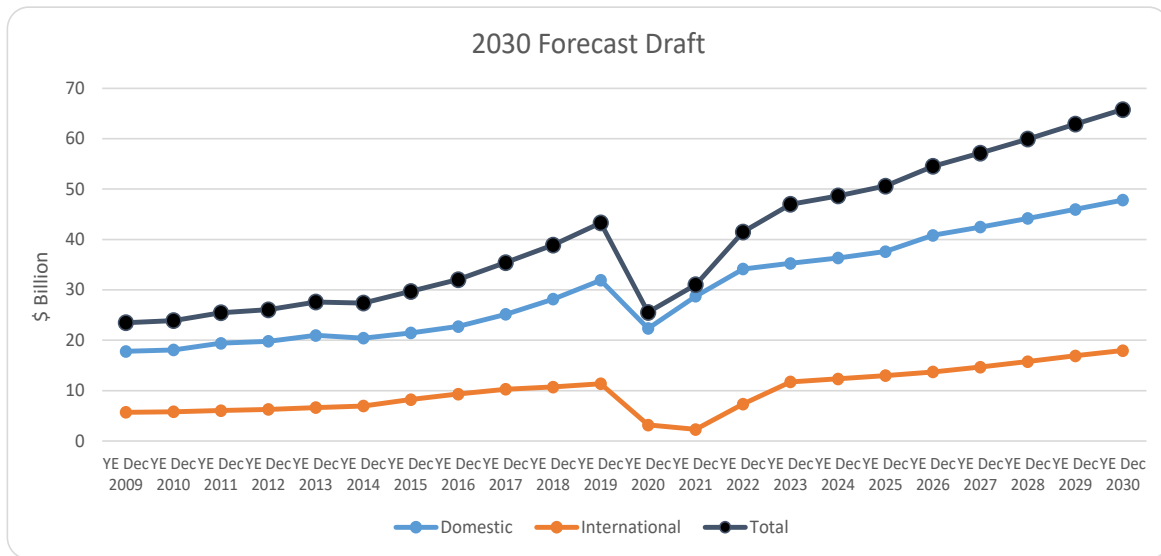
for International overnight visitors and nights, *attaining number 2 position for number International expenditure.*

**AND**

number 1 region for Domestic Daytrip visitors & expenditure.

# Overview

In our path going forward ...



***At Dec 2019 share, this would see North Coast exceed \$7.5 billion.***

Our horizons are now set on 2030 and the goal of **“\$65 billion in total visitor expenditure by 2030, \$25 billion in Regional NSW”**

We anticipate a **“Return to 2019”** by 2024.

With differing paths for International and domestic visitation.

We have broadened our goal to include Daytrip visitation as well as overnight – the Total Tourism value.



# What has happened




**In 2009, Total Tourism in North Coast delivered about \$5,430 every minute of every day of the year.**

**In 2019, the value climbed to \$9,837 per minute.**

**A year into COVID-19, the value is currently sitting just above \$7,000 per minute.**

**A total reduction of 28.2% since Dec 2019.**




# What has happened

	North Coast			NSW		
	YE Dec 2019	YE Dec 2020	% Change	YE Dec 2019	YE Dec 2020	% Change
 Millions	15.3	9.9	<b>-35.0%</b>	118.5	76.4	<b>-35.5%</b>
 Millions	28.5	19.2	<b>-32.5%</b>	219.1	108.2	<b>-50.6%</b>
 Billions	\$5.2	\$3.7	<b>-28.2%</b>	\$43.3	\$22.2	<b>-48.7%</b>

# What has happened

## Domestic

## International

	YE Dec 2019	YE Dec 2020	% Change	YE Dec 2019	YE Dec 2020	% Change
 Millions	14.9	9.9	-33.9%	375,000	68,000	-81.9%
 Millions	24.3	18.5	-24.0%	4.2 m	755,000	-81.9%
 Billions	\$4.9	3.7	-25.2%	\$265 m	\$44 m	-83.2%

Largest Impact Byron, Coffs, & Port Macq



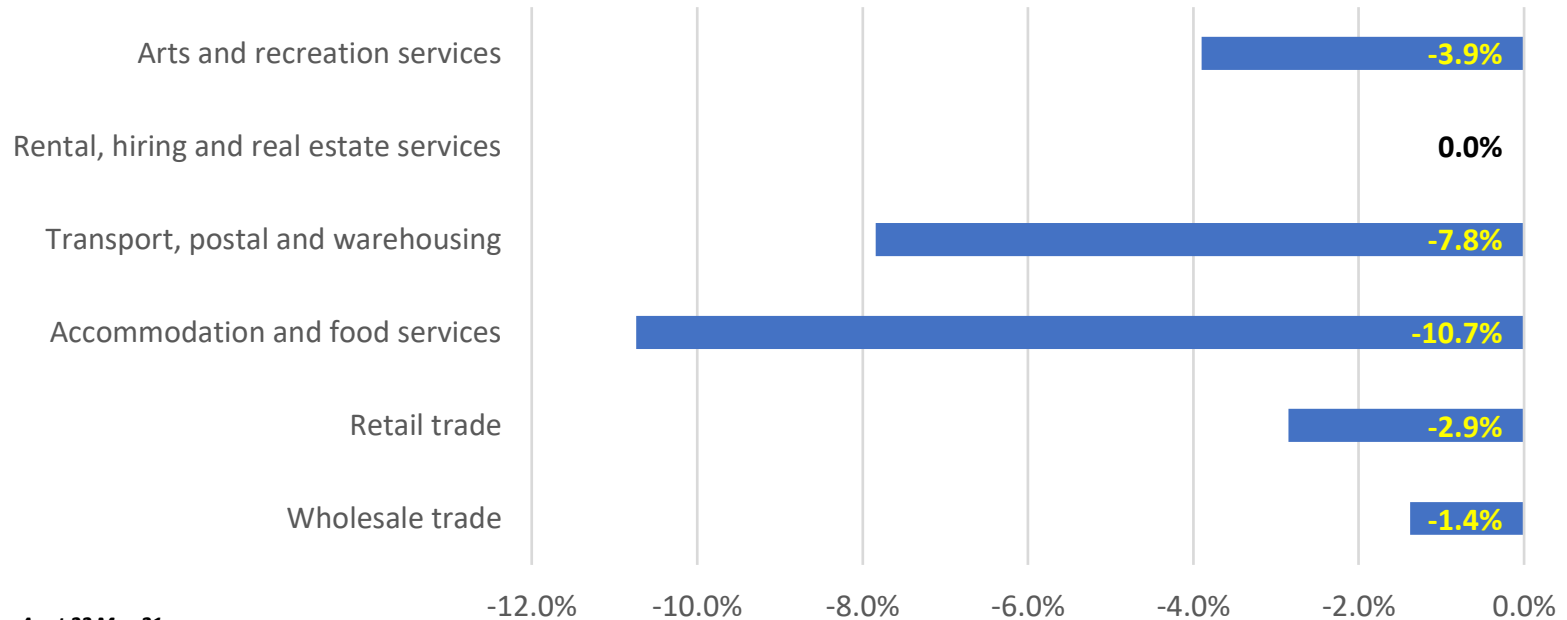
# Jobs – Change in Payroll jobs

Source: Australian Bureau of Statistics



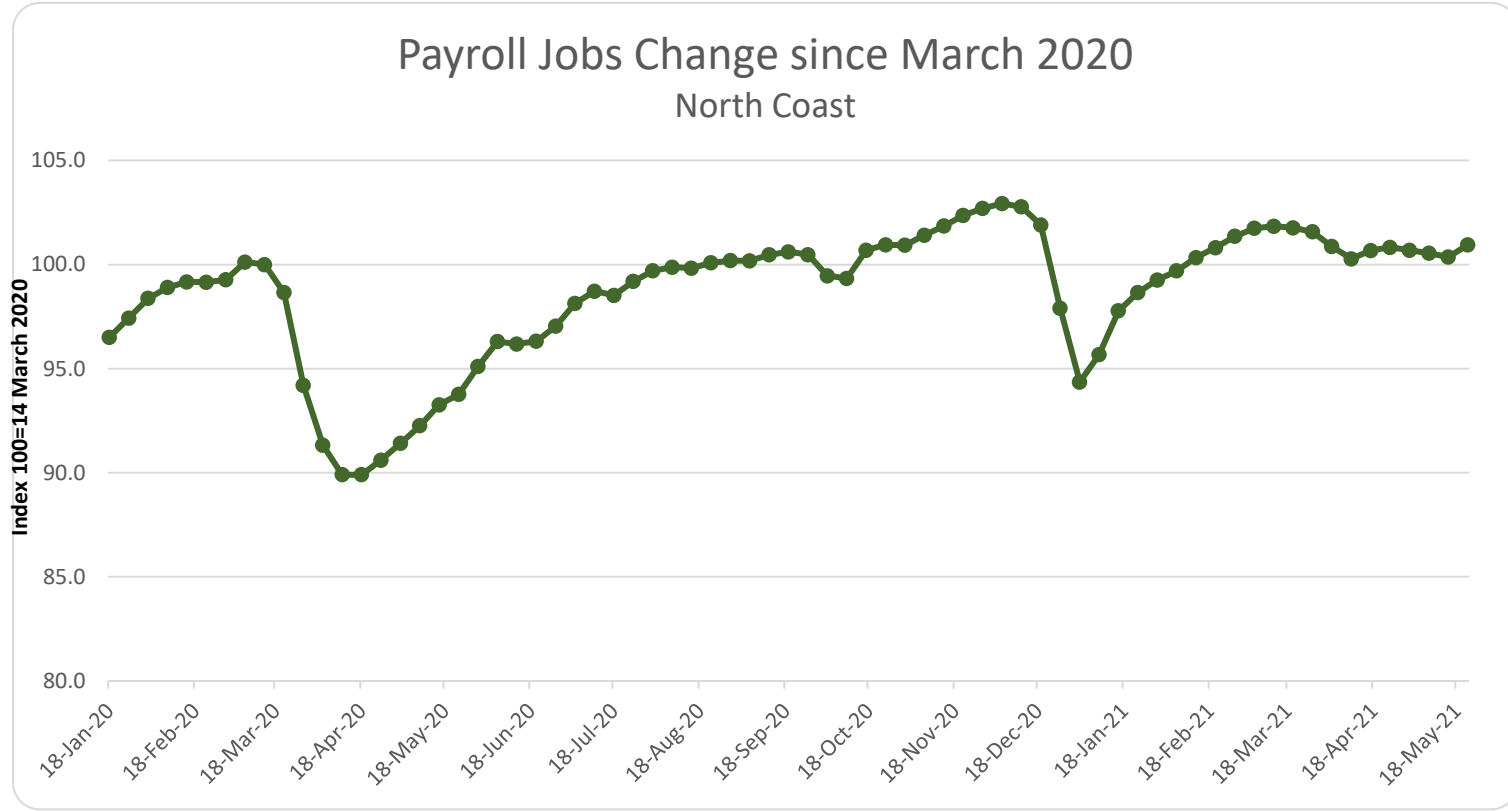
# Jobs – Change in Payroll jobs

Changes in Jobs since 14 March 2020 - NSW



As at 22 May 21

# Jobs – Change in Payroll jobs

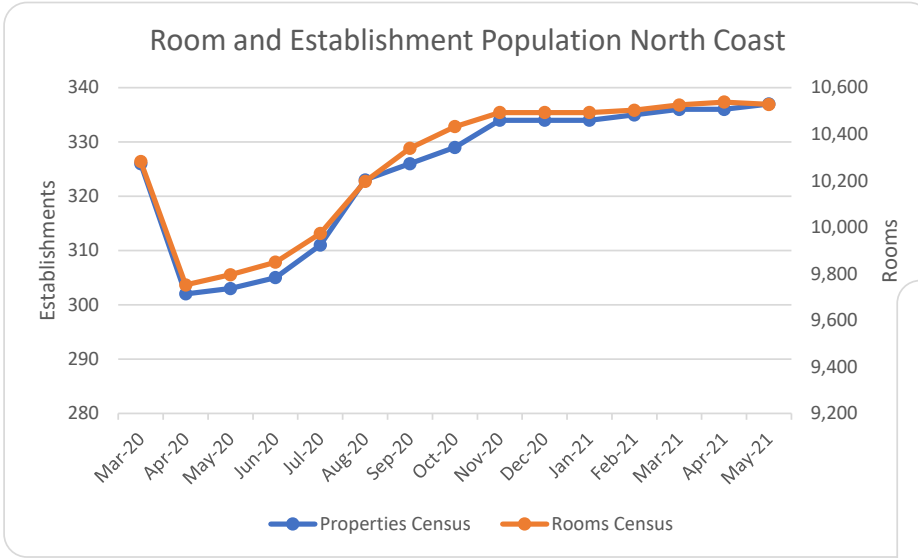


# Traditional Accommodation Market

Source: STR Global

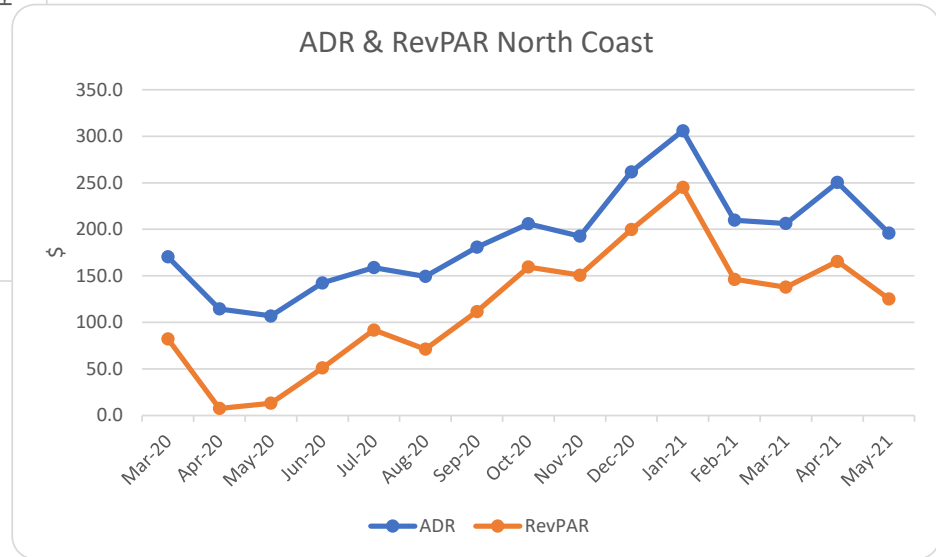
# Traditional Accommodation Market

Establishments with 10+ Rooms  
Average 32 Rooms – salience 20%-30%



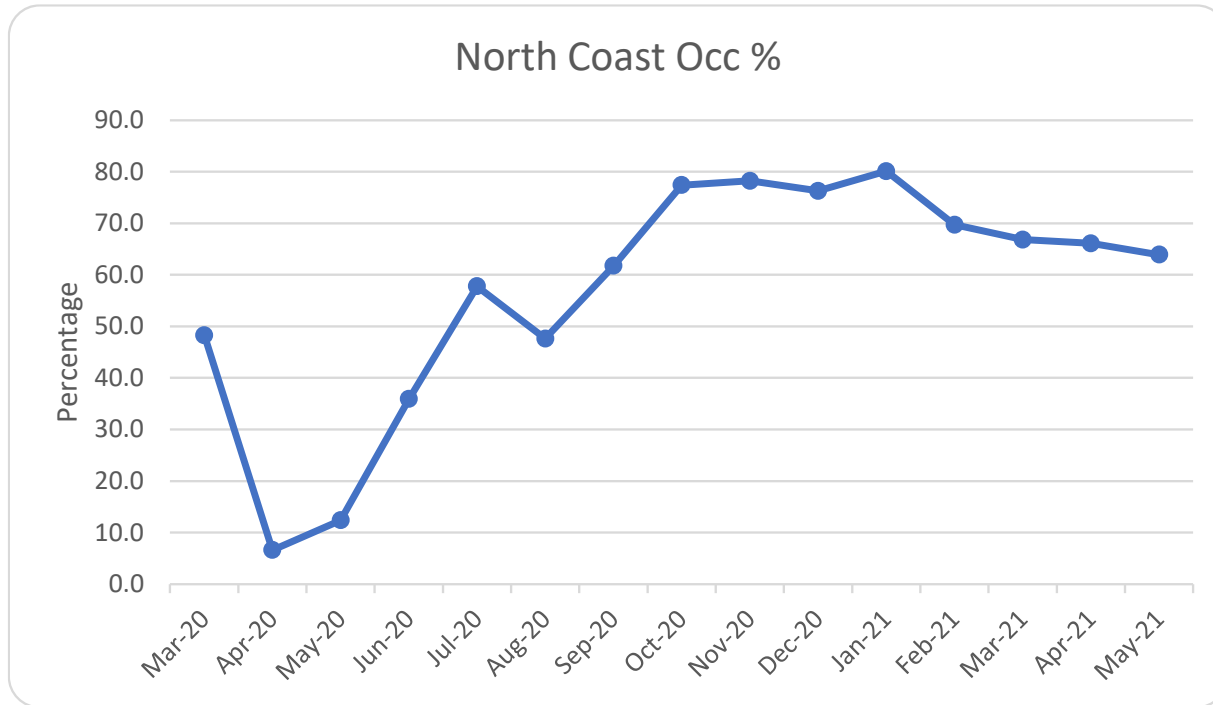
Constant growth and stability

Some ongoing adjustment to the circumstances



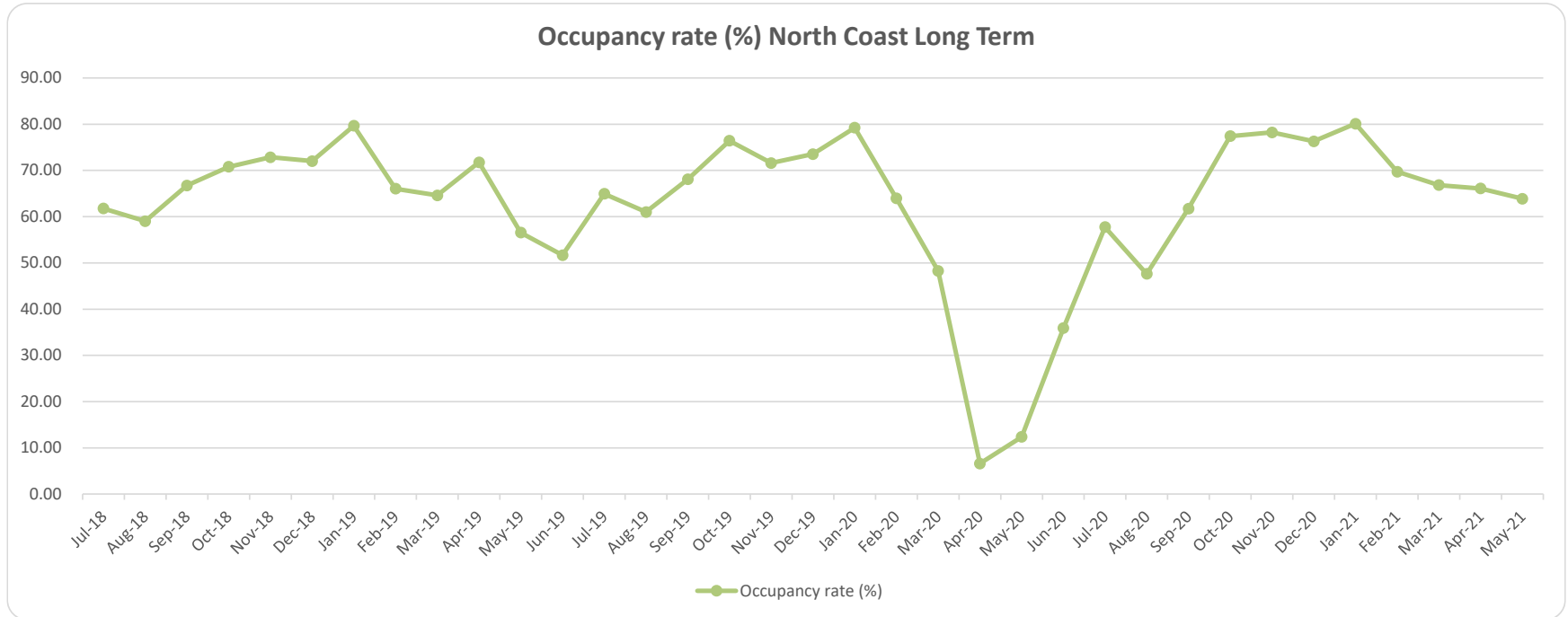
# Traditional Accommodation Market

*Covid Time period view*



# Traditional Accommodation Market

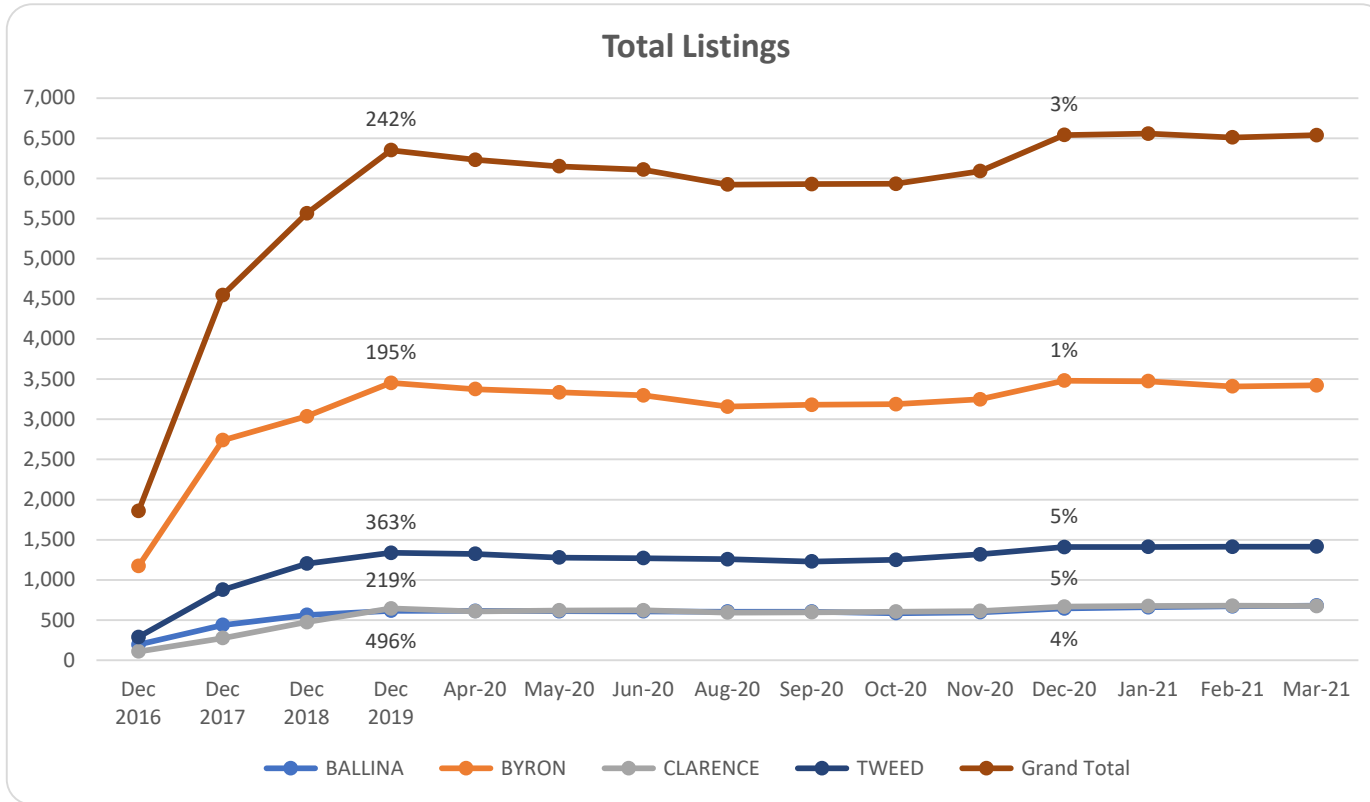
*Longer Term view*



# Airbnb Market estimate – Northern Rivers

Source: [Insideairbnb.com](https://insideairbnb.com)

# Airbnb Market estimate – Northern Rivers



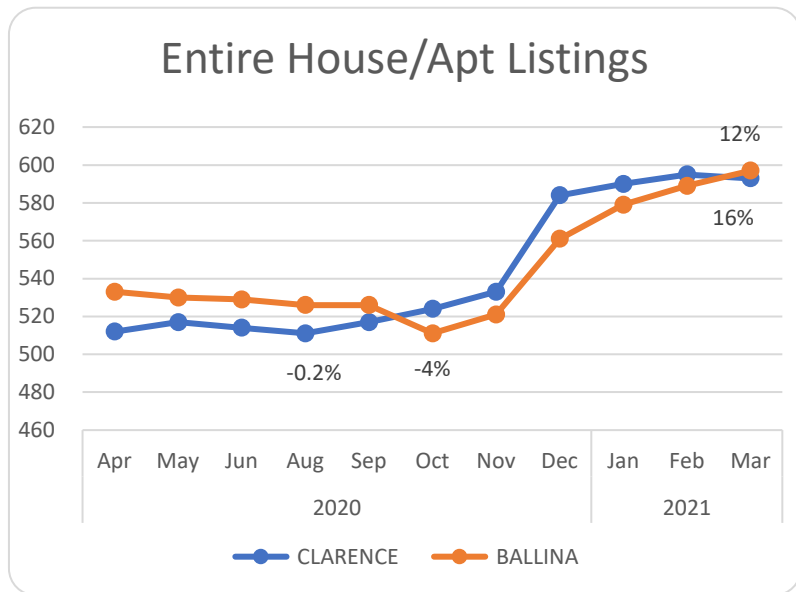
**Overall Listing Types**  
**Change in 2020:**  
**House/Apt** 81% - 83%  
**Hotel Room** 0.7 - 0.5%  
**Private Room** 18% - 16%  
**Share Room** 0.3 - 0.2%

**Though overall declined from 69% "Highly Available" (60 days+) to 54%, it has now recovered to 62%.**



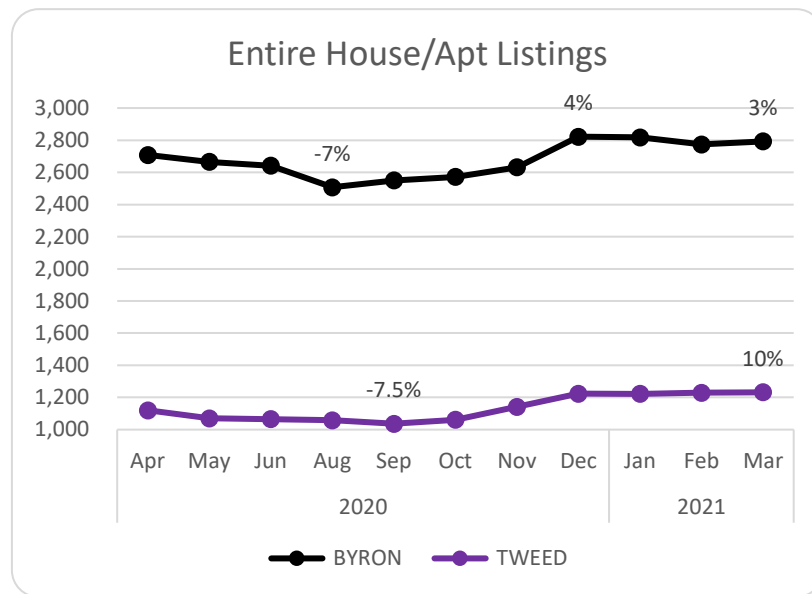


# Airbnb Market estimate – Northern Rivers



“Private Room” in Byron is 18% share - most significant of this group.

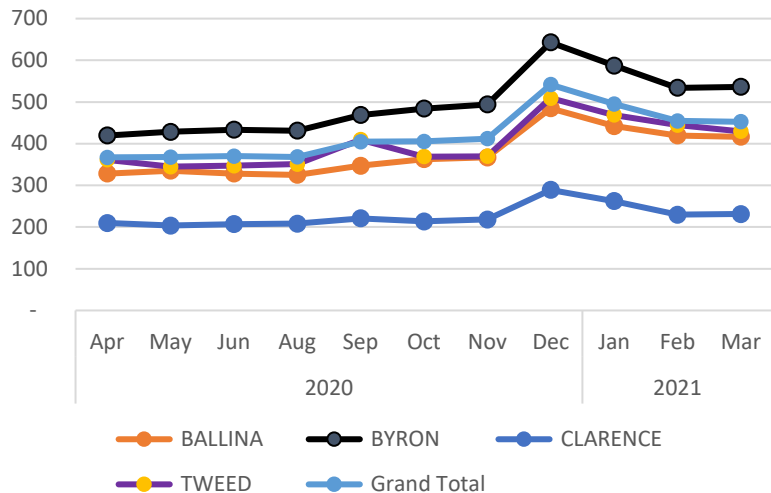
*Kyogle & Lismore 33% and 40% Private Room*



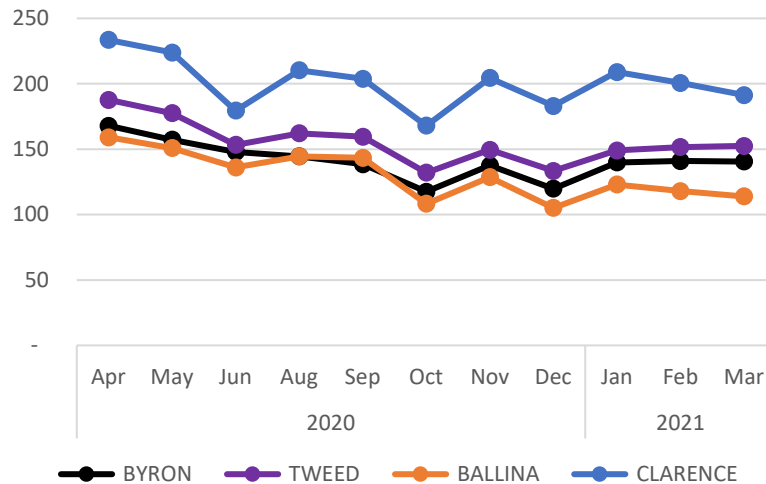
House/Apt %	BALLINA	BYRON	CLARENCE	TWEED
Apr-20	86.7%	80.2%	84.2%	84.7%
Mar-21	87.8%	81.6%	87.9%	87.1%
Growth	Yes		Yes	Yes
Share		Yes		Yes

# Airbnb Market estimate – Northern Rivers

## House Rental Prices



## Entire House/Apt Availability



	BALLINA	BYRON	CLARENCE	TWEED	Grand Total
Mar 21 vs April 20	27%	28%	10%	19%	23%
High Point	Dec	Dec	Dec	Dec	Dec
High Point vs Apr 20	48%	53%	38%	41%	48%
High Point vs Mar 21	-14%	-17%	-20%	-16%	-16%

## Occupancy Estimate

21%      17%      18%      15%

# NVS Monthly Series

Source: Tourism Research Australia

# NVS Monthly Series

## Visitors

% change on prev year (Syd)

% change on prev year (Reg NSW)

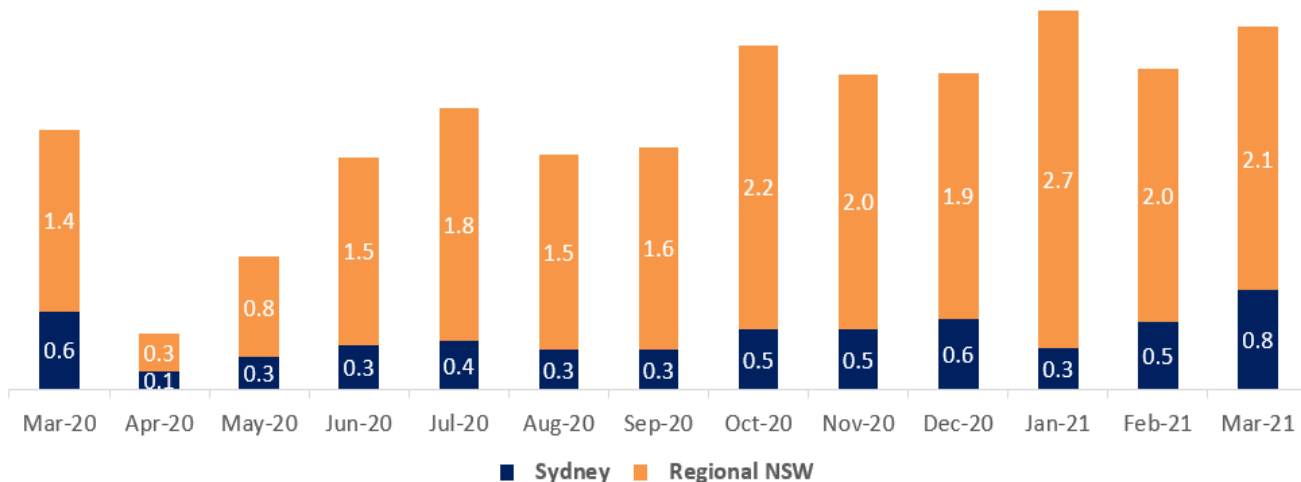
NSW												
Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21
-40%	-87%	-79%	-67%	-64%	-70%	-73%	-57%	-57%	-47%	-63%	-36%	27%
-32%	-89%	-61%	-32%	-21%	-23%	-29%	-5%	0%	-17%	5%	23%	45%

## % Share of NSW

YE Mar 2020    YE Mar 2021

Sydney	33%	20%
Reg NSW	70%	82%

  
Visitors  
(Million)



# NVS Monthly Series

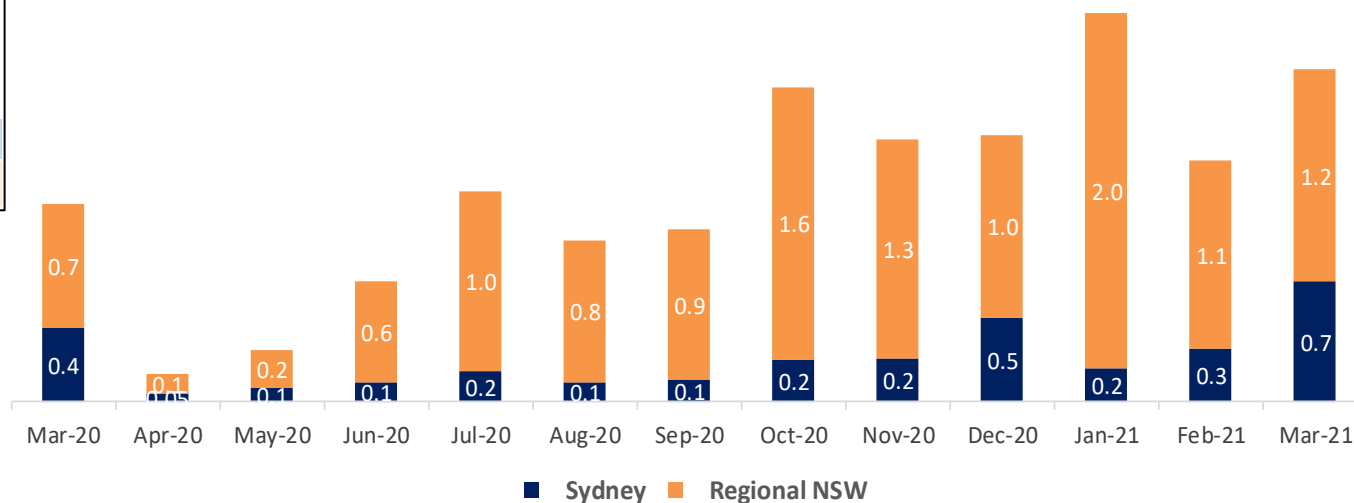
## Expenditure

	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21
% change on prev year (Syd)	-49%	-95%	-90%	-86%	-79%	-85%	-85%	-71%	-71%	-41%	-74%	-51%	63%
% change on prev year (Reg NSW)	-28%	-92%	-78%	-43%	-15%	-28%	-32%	22%	30%	-15%	11%	45%	71%

## % Share of NSW

	YE Mar 2020	YE Mar 2021
Sydney	40%	19%
Reg NSW	60%	81%

\$  
Expenditure  
(Billion)

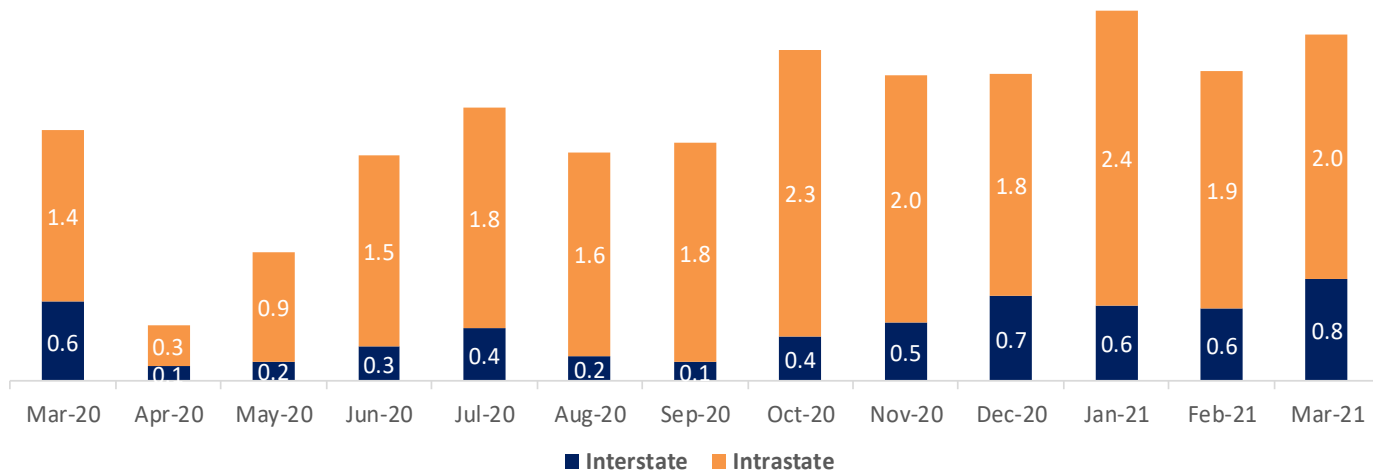


# NVS Monthly Series

## Origin to NSW

Visitors	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21
% change on prev year (Interstate)	-39%	-91%	-85%	-72%	-64%	-80%	-88%	-69%	-56%	-40%	-44%	-21%	29%
% change on prev year (Intrastate)	-33%	-87%	-60%	-31%	-17%	-17%	-19%	2%	0.2%	-19%	5%	14%	42%

% Share of NSW		
	YE Mar 2020	YE Mar 2021
Interstate	33%	19%
Intrastate	67%	81%



# Trends – identified or indicative

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## Overall ...

- More Day-trippers as a proportion
    - 10-15% growth after initial “opening” – now eased back - Daytrip is a significant proportion of visitors to North Coast.
  - Choice of “Available” will revert to Intention
  - Pent-up Demand still a consideration
  - Purchase Timeframe will remain reduced – typically 50% @ 3 months is now 1 month
- Expectations on services will increase
    - Cancellation processes and refunds
    - Online engagement
  - Consumer Confidence is highest since 2010 according to Westpac
    - Internal research shows CC for Travellers is marginally higher than for General Public
    - 46% have sufficient “certainty” to plan but 44% think their State will lockdown again (BBDO).
    - At the beginning of Covid 80% assumed it would last 1 year – now 61% think 1-3 years.



# Trends – identified or indicative

## Who's coming to North Coast ...

- More Intrastate Overnight – currently ..
  - 2.9:1 vs 1.6: 1 2019 Interstate visitors
  - 3.6:1 vs 1.7:1 2019 Interstate Spend
- More Youth (15-29) and Senior (60+) Day-trippers
  - +3% Youth visitors vs 2019
  - +8% 60+ visitors vs 2019
  - Intrastate 4.9:1 vs 2.4:1 2019 Interstate visitors

## Reaction Times will reduce





**THANK YOU**

