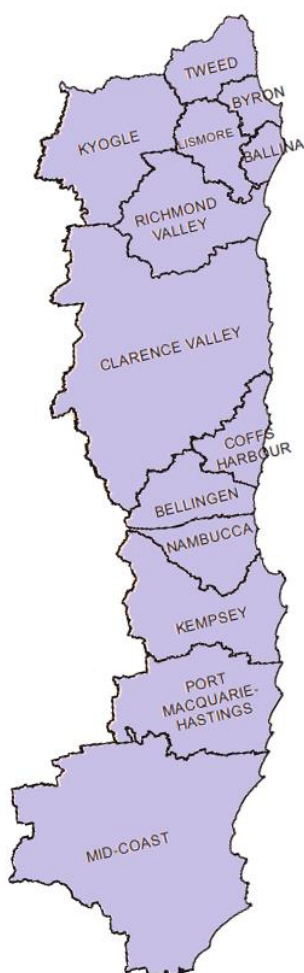




# Destination North Coast NSW

## The Value of Tourism to North Coast 2021



**Every minute of every day,  
Tourism delivers \$7,807 of  
visitor spend into  
North Coast**

**That is over \$11.2 million per day!  
A value that has grown by 9.7%  
in the last year alone.**

*In March 2020 the Commonwealth Government closed its international borders due to the rapid spread of Covid-19 virus which had a devastating impact on the tourism industry in NSW and Australia. Domestic travel to NSW was constrained by Public Health Orders resulting in numerous lockdowns and restrictions on intrastate and interstate movement. As a result, **International visitation to the North Coast Destination Network (DN)** for the year ended (YE) December 2021 cannot be shown individually in this booklet due to small sample size (which means that data is not statistically reliable).*

**This year the number of total visitors to the North Coast DN is 5.8 million or 37 per cent below the pre-Covid period (year 2019), and 3 per cent below the 2020 visitation level.**



Tourism delivers **9.4%** of our jobs, supports **8,066** businesses and directly delivers **5.9%** of our region's Gross Value Add (GVA).

**HOW DOES TOURISM COMPARE WITH OTHER MAJOR INDUSTRIES IN THE REGION?**

The NSW Visitor Economy (2.4% direct share of state GVA) is worth more than Agriculture, Forestry and Fishing combined (1.4% share of state total) and scores just below Mining (2.5% share of state total) in contribution to NSW.

Tourism in NSW is the 2<sup>nd</sup> largest NSW industry in terms of exports of merchandise and services (behind Mining and ahead of Manufacturing).

1. Mining (\$21.2 billion)
2. Tourism (\$18.8 billion)
3. Manufacturing (\$13.2 billion)

**EMPLOYMENT DUE TO TOURISM**

Tourism's DIRECT Contribution to Employment

**FULL TIME** 10,397  
**PART TIME** 13,635

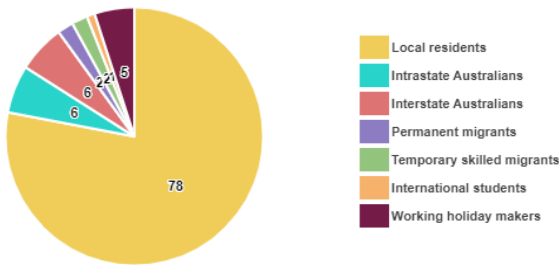


Supporting our local economy, Tourism supplies 9.4% of the region's employment including 24,032 persons who are directly employed and a further 8,366 who are indirectly employed.

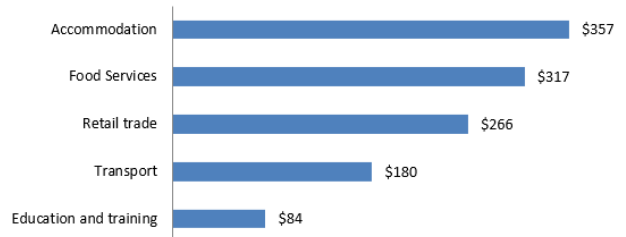
There are 8,066 tourism related businesses in North Coast DN, around 19% of all Regional NSW Tourism businesses.

**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.



North Coast Industry share of Direct Tourism GVA (\$m)



According to the Deloitte 2015-2020 Tourism Labour Force survey, over 78% of tourism job vacancies are filled by local residents of the area where the business is located.

It is estimated that NSW has a 10% vacancy rate in tourism jobs.

**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	\$	\$
<b>North Coast</b> Dec-2021	325	10,307	3,731	2,008	53.8%	440	219	118
%Ch on 2020	0.9%	0.8%	0.4%	-0.3%	-0.4ppts*	13.4%	13.7%	12.9%

\*percentage point change

North Coast DN has 325 accommodation establishments with a room stock of over 10,300 (for establishments with ten rooms or more).



Domestic direct inbound flights have increased in 2021 with a total of 7,686 flights (+43.8% yoy) delivering 664,357 seats (+45.6% yoy).

Note: Gross Value Added (GVA), Tourism Jobs and Businesses data are only available by tourism region. GVA was estimated based on visitor expenditure share while Tourism Jobs and Businesses were estimated based on visitor number share of the tourism regions within each DN in 2019 (pre-pandemic).



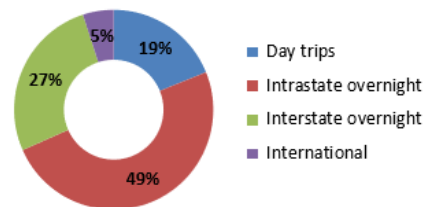
North Coast DN is **Number 1 DN** in terms of Visitor nights and Expenditure!

**ECONOMIC VALUE OF TOURISM**

In terms of what is consumed by Tourism in North Coast DN represents about 13% 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 \$5.0 b\***  
Share of DN consumption



\*Year ended December 2020 tourism consumption data

North Coast DN visitation has grown over 10% since 2016 in terms of visitor expenditure value.

**NORTH COAST DN TOTAL**

**9,764**

VISITORS (000)



**18,610**

NIGHTS (000)



**\$4,104**

EXPENDITURE (\$M)



**TRAVEL TYPE**

**ORIGIN**

**Domestic Overnight**

**4,416**

VISITORS (000)



**18,602**

NIGHTS (000)

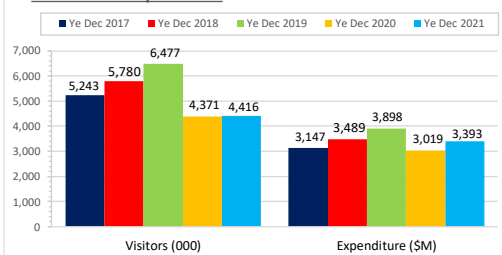


**\$3,393**

EXPENDITURE (\$M)



Visitors and Expenditure



Origin	Share of Visitors		Share of Expenditure	
	YE Dec 20	YE Dec 21	YE Dec 20	YE Dec 21
Regional NSW	43.8%	40.4%	34.5%	28.7%
Sydney	30.9%	30.3%	43.9%	45.5%
<b>Total Intrastate</b>	<b>74.7%</b>	<b>70.7%</b>	<b>78.5%</b>	<b>74.2%</b>
Queensland	20.7%	21.7%	15.4%	14.3%
Victoria	3.0%	5.5%	4.1%	9.2%
ACT	1.2%	0.6%	1.1%	0.7%
Other Interstate	0.4%	1.4%	0.9%	1.6%
<b>Total Interstate</b>	<b>25.3%</b>	<b>29.3%</b>	<b>21.5%</b>	<b>25.8%</b>

**Domestic Daytrip**

**5,346**

VISITORS (000)

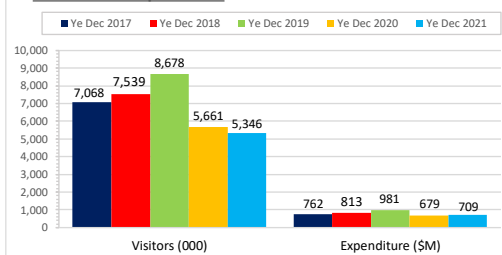


**\$709**

EXPENDITURE (\$M)



Visitors and Expenditure



Origin	Share of Visitors		Share of Expenditure	
	YE Dec 20	YE Dec 21	YE Dec 20	YE Dec 21
Interstate	16.7%	16.6%	12.6%	17.6%
<b>Intrastate</b>	<b>83.3%</b>	<b>83.4%</b>	<b>87.4%</b>	<b>82.4%</b>

### NORTHERN RIVERS

4,527

VISITORS (000)



7,829

NIGHTS (000)



\$1,964

EXPENDITURE (\$M)



### MID NORTH COAST\*

5,445

VISITORS (000)



10,627

NIGHTS (000)



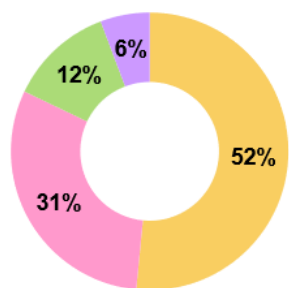
\$2,072

EXPENDITURE (\$M)



Note: Purpose of visit shares provided only when statistically reliable

### TRAVEL TYPE



1,979

VISITORS (000)



Domestic Overnight

7,825

NIGHTS (000)



\$1,634

EXPENDITURE (\$M)



- Holiday
- Visiting friends and relatives
- Business
- Other

2,646

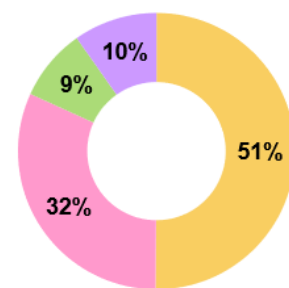
VISITORS (000)

10,622

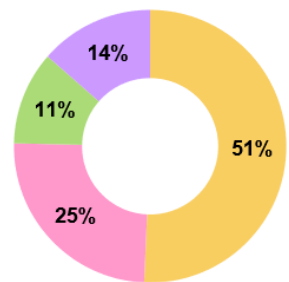
NIGHTS (000)

\$1,693

EXPENDITURE (\$M)



- Holiday
- Visiting friends and relatives
- Business
- Other



2,547

VISITORS (000)



Domestic Daytrip

\$330

EXPENDITURE (\$M)



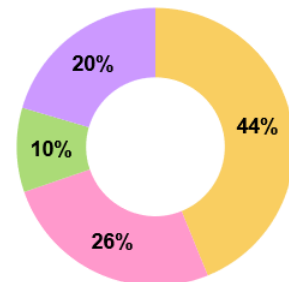
- Holiday
- Visiting friends and relatives
- Business
- Other

2,799

VISITORS (000)

\$379

EXPENDITURE (\$M)



- Holiday
- Visiting friends and relatives
- Business
- Other



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

Notes:

Items with an asterisk \* are available but not statistically reliable.

Items with n/a means data are not available.



Domestic Overnight Visitors



Daytrip Visitors

	Domestic Overnight Visitors	Daytrip Visitors
Eat out / dine at a restaurant and/or cafe	60%	41%
Go to the beach	51%	17%
Visit friends & relatives	32%	24%
Pubs, clubs, discos etc	26%	7%
Sightseeing/looking around	23%	11%
Bushwalking / rainforest walks	22%	5%
Go shopping for pleasure	20%	20%
Visit national parks / state parks	15%	7%
Fishing	10%	*
Go to markets	8%	*
Exercise, gym or swimming	8%	*
Water activities / sports	8%	*
Surfing	8%	*
Visit museums or art galleries	5%	*
Play other sports	4%	*
Go on a daytrip to another place	4%	n/a
Cycling	4%	*
Visit history / heritage buildings, sites or monuments	3%	*
Other outdoor activities nfd	3%	*
Golf	3%	*
Picnics or BBQs	3%	*
Visit food markets (2016 onwards)	2%	*
Visit wildlife parks / zoos / aquariums	2%	*
Visit botanical or other public gardens	2%	*



## Is your region getting its share of the Visitor/Tourism economy?

### NORTH COAST DN

#### TOTAL

9,764

VISITORS (000)



18,610

NIGHTS (000)



\$4,104

EXPENDITURE (\$M)



Note:

International data cannot be provided due to small sample size (data is statistically unreliable), however, it is included in the Total for each LGA.

### NORTHERN RIVERS

#### TOTAL Northern Rivers

	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	4,527	1,979	2,547
Share of NC %	46%	45%	48%
Expenditure (\$M)	1,964	1,634	330
Share of NC %	48%	48%	47%

### MID NORTH COAST\*\*

#### TOTAL Mid North Coast\*\*

	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	5,445	2,646	2,799
Share of NC %	56%	60%	52%
Expenditure (\$M)	2,072	1,693	379
Share of NC %	51%	50%	53%

Ballina (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	621	285	336
Share of NC %	6%	6%	6%
Expenditure (\$M)	305	249	56
Share of NC %	7%	7%	8%

Bellingen (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	248	121	*
Share of NC %	3%	3%	*
Expenditure (\$M)	78	61	*
Share of NC %	2%	2%	*

Byron (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	1,129	613	516
Share of NC %	12%	14%	10%
Expenditure (\$M)	792	732	60
Share of NC %	19%	22%	8%

Coffs Harbour (C)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	1,424	670	753
Share of NC %	15%	15%	14%
Expenditure (\$M)	571	465	106
Share of NC %	14%	14%	15%

Clarence Valley (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	686	402	283
Share of NC %	7%	9%	5%
Expenditure (\$M)	290	256	33
Share of NC %	7%	8%	5%

Kempsey (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	462	274	*
Share of NC %	5%	6%	*
Expenditure (\$M)	231	198	*
Share of NC %	6%	6%	*

Kyogle (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	117	*	*
Share of NC %	1%	*	*
Expenditure (\$M)	14	*	*
Share of NC %	0%	*	*

Mid-Coast (A)**	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	1,907	1,056	850
Share of NC %	20%	24%	16%
Expenditure (\$M)	608	511	97
Share of NC %	15%	15%	14%

Lismore (C)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	535	146	389
Share of NC %	5%	3%	7%
Expenditure (\$M)	107	45	62
Share of NC %	3%	1%	9%

Nambucca (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	227	126	*
Share of NC %	2%	3%	*
Expenditure (\$M)	89	82	*
Share of NC %	2%	2%	*

Richmond Valley (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	335	112	222
Share of NC %	3%	3%	4%
Expenditure (\$M)	57	41	17
Share of NC %	1%	1%	2%

Port Macquarie-Hastings (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	1,390	610	780
Share of NC %	14%	14%	15%
Expenditure (\$M)	496	376	120
Share of NC %	12%	11%	17%

Tweed (A)	Total Tourism	Domestic Overnight	Daytrip
Visitors (000)	1,240	495	745
Share of NC %	13%	11%	14%
Expenditure (\$M)	400	301	99
Share of NC %	10%	9%	14%

North Coast DN also includes other Unincorporated areas for which data are available but not statistically reliable.