

Visitation Report

Ballina LGA

Year-end December 2023



**DESTINATION
RESEARCH**

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Key Performance Indicators

The data for this report is sourced from the National and International Visitor surveys produced by Tourism Research Australia (TRA), based on data for the year-end December 2023 for the Ballina LGA. The survey results are estimates and should be viewed as trends rather than exact numbers¹. As shown, they highlight the ongoing improvement from the Covid-19 lockdowns and flood impacts of previous years and suggest continued improvement.

- **Total visitation increased by 17% from the previous year** to approximately 976,000 visitors.
- Domestic overnight visitors increased 35% on the previous year with approximately 424,000 visitors spending 1.2 million nights in the Ballina LGA – at an average stay of 2.9 nights.
- Day visitors increased slightly on the previous year by 4% to 540,000 visitors.
- International visitors are returning to pre-covid levels to 12,000, spending 82,000 nights in the Ballina LGA – at an average stay of 6.9 nights.

KEY VISITATION INDICATORS

Year-end December '000	2019	2020	2021	2022	2023	5 year average
Domestic overnight visitors	433	253	285	313	424	342
% change	34%	-42%	13%	10%	35%	10%
Domestic nights	1,266	810	928	965	1,250	1,044
% change	33%	-36%	15%	4%	30%	9%
av night stay	2.9	3.2	3.3	3.1	2.9	3.1
Domestic day visitors	492	386	336	519	540	455
% change	-21%	-22%	-13%	54%	4%	1%
International visitors	16	3	0	5	12	7
International Nights	138	41	0	62	82	65
av night stay	8.6	13.6		12.4	6.9	9.0
Total Visitors	941	642	621	837	976	803
% change	-2%	-32%	-3%	35%	17%	3%
Total Nights	1,404	851	928	1,027	1,332	1,108

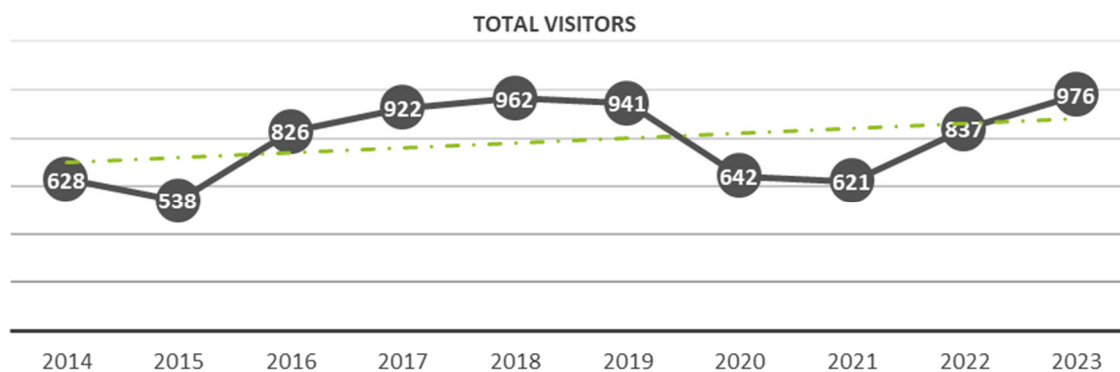
Source: National Visitor Survey & International Visitor Survey, Tourism Research Australia

¹ See pg 8 Methodology and sample constraints.

Segment growth

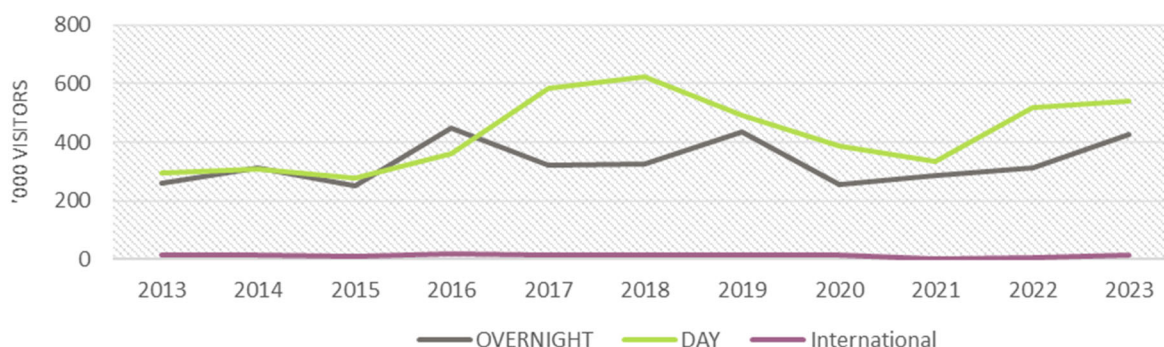
The rebound in all visitors has been very positive in recovery from the travel restrictions of Covid_19, with total visitor numbers pushing slightly higher than the total in 2018. As shown the growth rate over the 10 year timeframe is trending upward at a rate of 10% per year.

TEN YEAR VISITATION TRENDS



- The growth of **overnight visitors** has been positive over the past 10 years with an average growth rate of 10%. As shown below, following the dip in 2020, the last three years have maintained positive growth.
- **The increase in overnight visitors of 35% from 2022 to 2023 is much higher than the trend to other NSW Regional areas where the increase in domestic overnight trips is estimated at 5% in 2022-2023².**
- The number of **day visitors** has also increased by an average growth rate of 10% over the past 10 years.
- The increase of 4% in day visitors from 2022 to 2023 is a little lower than other NSW Regional areas where day visits have increased by 12% in 2022-23¹.

ALL VISITOR MARKETS



² <https://www.tra.gov.au/en/domestic/domestic-tourism-results> NVS Survey results data tables Dec 2022-2023.

Source markets

In 2023, the majority of **domestic overnight** visitors came from NSW, with half of the overnight visitors (50%) and 80% of day visitors (80%) residing in NSW. Sydney is a key market segment (16%) along with surrounding areas of the NSW North Coast.

Ballina LGA received just under half of its overnight visitors (46%) from Queensland and 10% of day visitors.

Day visitors predominantly came from many neighbouring areas of NSW North Coast (74%) (mainly Lismore 16%, Casino 7% and Tweed Coast 13%); however a decreased number came from the Gold Coast (9%).

DOMESTIC SOURCE MARKETS (YEAR-END DECEMBER 2023)

State	Region	Overnight 2023	Overnight 5-year av	Day 2023	Day 5-year
NSW (50%)	Sydney	16%	17%	6%	2%
	North Coast NSW	15%	14%	74%	69%
	Hunter	1%	5%		
	Central Coast	7%	4%		
	New England North West	6%	4%		
	Other NSW	5%	3%		
			50%	49%	80%
QLD (46%)	Brisbane	23%	27%	11%	10%
	Gold Coast	5%	8%	9%	16%
	Sunshine Coast	4%	2%	0%	1%
	Other QLD	7%	7%		
			46%	43%	20%
VIC (2%)	Melbourne	1%	3%		
	Other VIC	1%	2%		
		2%	5%		
Other States (2%)	SA (ADL)	<1%	1%		
	ACT (CBR)	1%	1%		
	TAS (Hobart)	<1%	<1%		
	WA (Perth)	1%	1%		
	NT	<1%	<1%		

Source: National Visitor Survey, Tourism Research Australia

Accommodation

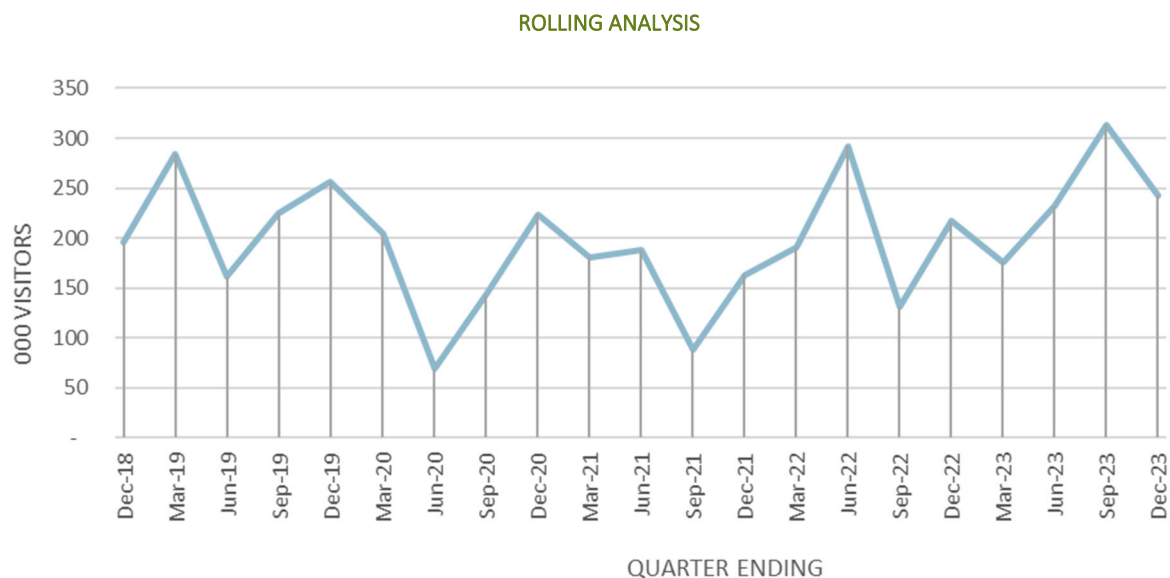
51% of domestic overnight visitors stayed in commercial accommodation, while 49% stayed in private accommodation - VFR (37%) camping (7%) and private property (5%).

Reason for visit

In 2023, there was shift in the reason to visit Ballina with an increase in visiting friends/relatives (39% overnight; 46% day), rather than for the purpose of a **holiday** (30% overnight; 37% day), while other reasons included business (20%; 4%), health and other appointments (4%; 13%).

Year to date analysis

Analysis of domestic data over the past 5 years shows the seasonal fluctuations for each quarter. In the past year, the highest quarter was July to September 2023. This quarter is not traditionally a strong quarter but has contributed to the overall higher result for the year.



Note: The impacts of major lockdowns in September 2021 and June 2020 can clearly be seen in this chart.

Quarterly analysis

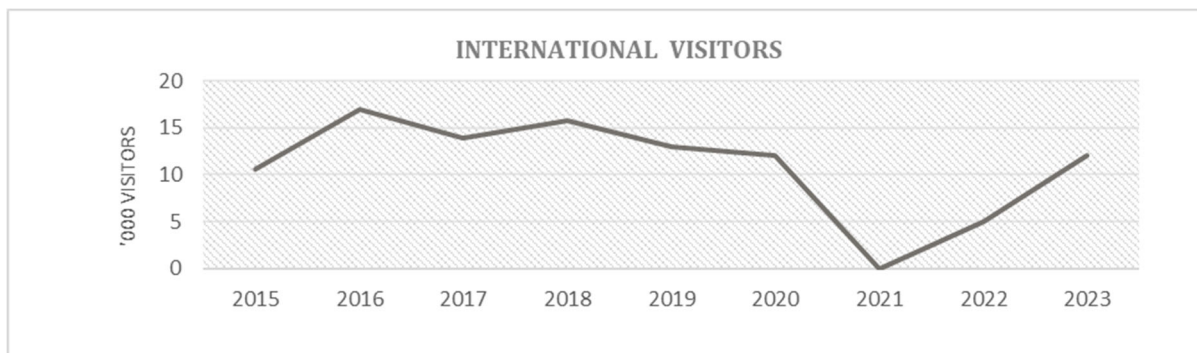
As shown, there were both increases and decreases in all four quarters from the previous year ^^ with July to September showing a 139% increase from the previous year.

QUARTER ANALYSIS

Quarter '000	Jan-Mar 2022	Apr-June 2022	Jul-Sept 2023	Oct-Dec 2023	Annual year-end December
Domestic overnight visitors	65	115	137	107	424
% change on previous qtr	-22%	77%	19%	-22%	
Domestic day visitors	111	117	176	136	540
% change on previous qtr	-17%	5%	50%	-23%	
total visitors	176	232	313	243	964
% change on previous qtr	-19%	32%	35%	-22%	
% change on same qtr previous year ^^	-8%	-21%	139%	12%	

International Visitors

Data for international visitors has been made available for 9 months of 2023, having been unavailable in 2020-2022 as a result of Covid-19 border closures. The number of international travellers averaged 14,000 per annum before 2020 - comprising less than 2% of total visitation. In 2023, TRA recorded 12,000 visitors to Ballina suggesting international visitation is recovering and is likely to return to previous levels in 2024-25.



INTERNATIONAL '000	2018	2019	2020	2021	2022	2023	5 yr average
# of visitors*	13	16	3	-	5	12	10
Nights	84	138	41		62	82	81
Av night stay	6.4	8.4	12.7		12.6	6.7	9.4
Sample size	72	81	20	1	504	71	125
2023 Source regions	NZ (29%) Europe incl UK (42%) Nth America (13%) Asia (12%) Other (4%)						
2023 Top source countries	NZ (29%) UK (18%) Germany (16%) Canada (10%)						

Visitor Residence (INT)

Over the past 10 years, Ballina attracted a consistent mix of international markets, with the main generating regions being New Zealand, North America and Europe/UK. As shown below the mix in 2023 was slightly different with less from USA and Europe and more from closer markets including NZ and Asia.

	2010-2020	2023
New Zealand	15%	29%
Europe & UK	55%	42%
Asia	6%	12%
North America	18%	13%
all other countries - including Sth America, UAE and Pacific	6%	5%

Traveller Type (INT)

The following characteristics are typical of international visitors to Ballina:

- 98% FIT travellers, with only 2% on a group tour.
- 5% on a packaged tour.
- Backpackers comprise 22% of the market.

The main purpose of travel is for holiday (66%) or VFR (30%), with 8% attending a sport event.

Competitor Analysis

When looking at the end of the 2023 calendar year across different North Coast destinations, there has been positive change on the previous year for most LGAs - and yet the results for domestic visitors has been varied amongst them.

Ballina LGA has the **HIGHEST increase in total visitation from the previous year** in these North Coast destinations.

		2019	2020	2021	2022	2023	change on previous year
Ballina	Domestic overnight	433	253	285	313	424	35%
	Domestic day	492	386	336	519	540	4%
	International	16	3	-	5	12	140%
	Total	941	642	621	837	976	17%
Coffs Coast	Domestic overnight	1,062	786	774	928	1,040	12%
	Domestic day	954	933	880	787	625	-21%
	International	104	17		21	53	152%
	Total	2,120	1,736	1,654	1,736	1,718	-1%
Lismore	Domestic overnight	212	181	138	164	121	-26%
	Domestic day	745	370	359	465	601	29%
	International	11	3		3	6	100%
	Total	968	554	497	632	728	15%
Byron Bay	Domestic overnight	1,014	523	613	713	746	5%
	Domestic day	1,172	423	516	739	729	-1%
	International	223	39		58	149	157%
	Total	2,409	985	1,129	1,510	1,624	8%
Port Macquarie	Domestic overnight	880	687	610	816	801	-2%
	Domestic day	855	691	780	613	829	35%
	International	5	1		1	4	300%
	Total	1,740	1,379	1,390	1,430	1,634	14%
North Coast	Domestic overnight	6,402	4,303	4,322	5,490	5,632	3%
	Domestic day	8,510	5,558	5,221	5,902	6,712	14%
	International	374	68	-	107	257	140%
	Total	15,286	9,929	9,543	11,499	12,601	10%

Methodology

This report has been compiled by researchers from Destination Research. The visitation statistics contained in this report are based on the sample data collected by TRA and therefore provide an indication of visitor trends rather than actual performance measures.

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>

TRA data is recorded at SA2 level to include the following areas for the Ballina LGA and its tourism area of “Ballina Coast and Hinterland”

1. Ballina
2. Lennox Head
3. Alstonville
4. Other regional Ballina e.g. Knockrow

Disclaimer and Copyright

The information presented in this report is accurate at the time of printing. Whilst all care is taken to ensure its accuracy, no liability is accepted for loss or damage as a result of its content. Findings and recommendations are based on the data of the current study; further research may be required to validate the findings of this study.

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