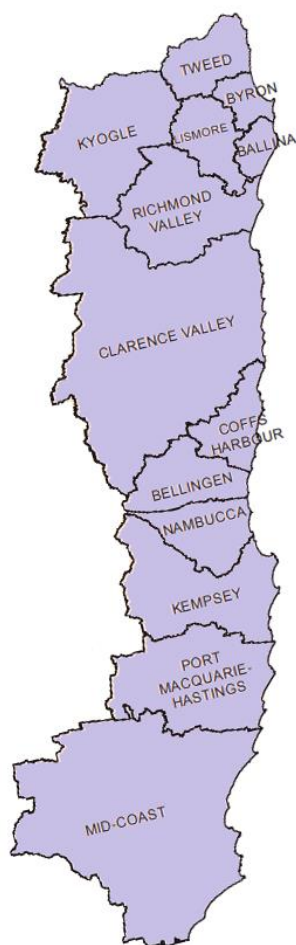




Destination
North Coast NSW

The Value of Tourism to North Coast 2018



**Every minute of every day,
Tourism delivers \$8,710 of
visitor spend into
North Coast**

**That is almost \$12.5 million per day!!
A value that has grown by 9.8%
in the last year alone.**

Tourism delivers **9.4%** of our jobs, supports **7,072** businesses and delivers **7.1%** of our region’s Gross Value Add which has grown every year since 2010/11 at an average **3.5%** pa.

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

The NSW Visitor Economy (3.0% direct share of state total GDP) is worth more than Agriculture, Forestry and Fishing combined (2.0% share of state total) and scores just below Mining (3.2% share of state total) in contribution to NSW.

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

1. Mining (\$17.5 billion)
2. Tourism (\$13.0 billion)
3. Manufacturing (\$9.8 billion)

EMPLOYMENT DUE TO TOURISM

Tourism's DIRECT Contribution to Employment

FULL TIME 10,164

PART TIME 11,698

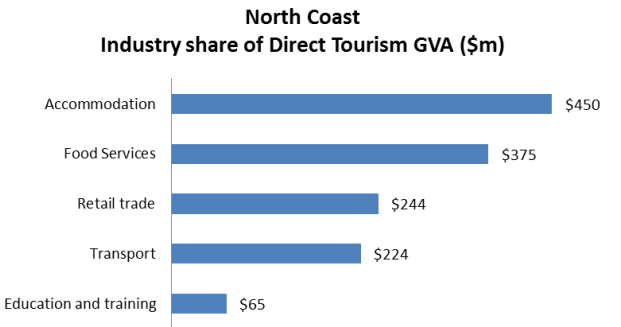
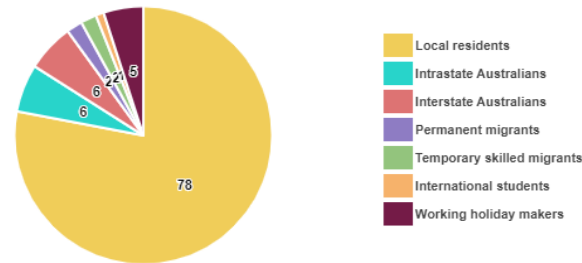


Supporting our local economy, Tourism supplies 9.4% of the region’s employment including 22,004 persons who are directly employed and a further 8,426 who are indirectly employed.

There are 7,072 tourism related businesses in North Coast DN, around 19% of all Regional NSW Tourism businesses.

BUSINESSES RELYING ON TOURISM

Economically, these tourism businesses deliver over \$1.5 billion (7.1%)* of the region’s Gross Value Add – nearly 90% of which is delivered directly by our Accommodation, Food Service, Retail, Transport and Education establishments.



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		SUPPLY			DEMAND		REVENUE		
	YE	Establishments no.	Rooms no.	Room nights available (000) no.	Room nights occupied (000) no.	Room occupancy rate %	Takings from accommodation \$ millions	Average daily rate \$	Revenue per available room \$
North Coast	Dec-2018	312	10,101	3,687	2,372	64.3%	425	179	115
	%Ch on 2017	-0.4%	-0.1%	-0.1%	3.7%	3.8%	14.0%	9.9%	14.1%

North Coast DN has over 300 accommodation establishments with a room stock of over 10,000 (for establishments with ten rooms or more).



Domestic direct inbound seats and flights have decreased in 2018 with a total of 10,576 flights (-12.6% yoy) delivering 855,941 seats (-4.7% yoy).

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

* indicates direct contribution.

Sources: Tourism Research Australia, State Tourism Satellite Accounts, 2016-17, Official Airline Guide OAG YE Dec 2018; STR Tourist Accommodation 2018.



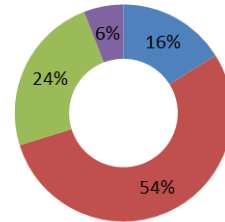
North Coast DN is **Number 1 DN** in terms of visitor nights!

ECONOMIC VALUE OF TOURISM

In terms of what is consumed by Tourism, in North Coast DN represents about 12% of the state's Total Tourism Consumption. This is mostly delivered by Intrastate tourism to the Region.

North Coast has a substantial Domestic tourism market.

North Coast \$4.8 b
Share of DN consumption



Day trips
Intrastate overnight
Interstate overnight
International

North Coast DN visitation has grown over 35% since 2012 in terms of visitor expenditure value.

NORTH COAST DN TOTAL

14,133

VISITORS IN NC
(000)



25,008

NIGHTS IN NC
(000)



4,578

EXPENDITURE IN NC
(\$M)



TRAVEL TYPE

ORIGIN

International Overnight



363

VISITORS IN NC
(000)



3,855

NIGHTS IN NC
(000)

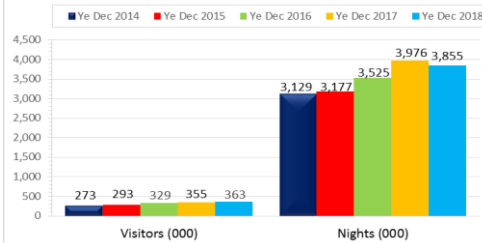


235

EXPENDITURE IN NC
(\$M)



Visitors and nights



Share of International visitors to North Coast DN			
Rank	Individual market	YE Dec 17	YE Dec 18
1	United Kingdom	19.6%	19.0%
2	Germany	10.9%	11.1%
3	New Zealand	10.9%	9.9%
4	United States of America	10.2%	9.2%
5	France	4.7%	5.3%

Origin Region	YE Dec 17	YE Dec 18
Europe	64.6%	59.9%
North America	13.2%	14.2%
Asia	9.7%	12.5%
Other Countries	12.5%	13.4%

Domestic Overnight



5,842

VISITORS IN NC
(000)



21,153

NIGHTS IN NC
(000)

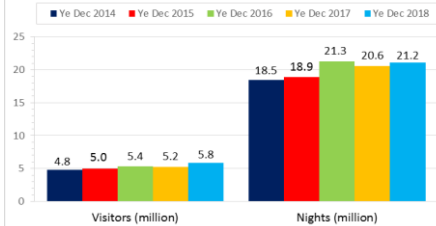


3,504

EXPENDITURE IN NC
(\$M)



Visitors and nights



Origin	Share of Visitors		Share of Nights	
	YE Dec 17	YE Dec 18	YE Dec 17	YE Dec 18
Regional NSW	39.8%	35.5%	37.6%	34.1%
Sydney	22.9%	27.7%	25.2%	29.6%
Total Intrastate	62.7%	63.2%	62.8%	63.6%
Victoria	5.7%	5.6%	7.7%	8.7%
Queensland	28.0%	27.9%	24.3%	22.6%
ACT	*	*	*	*
Other Interstate	2.4%	1.5%	3.4%	2.3%
Total Interstate	37.3%	36.8%	37.2%	36.4%

Domestic Daytrip



7,929

VISITORS IN NC
(000)



n/a

NIGHTS IN NC
(000)

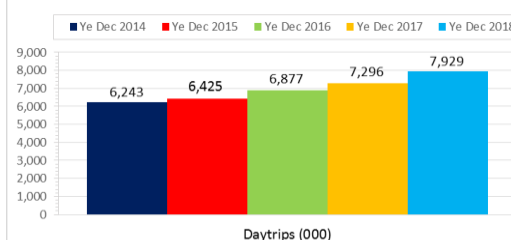


839

EXPENDITURE IN NC
(\$M)



Daytrips



Origin of domestic daytrip visitors to North Coast DN	
YE Dec 2018	Visitors (000)
Intrastate	5781
Interstate	2147
Total	7929

NORTHERN RIVERS

7,686

VISITORS IN NC
(000)



11,427

NIGHTS IN NC
(000)



2,173

EXPENDITURE IN NC
(\$M)



MID NORTH COAST*

6,333

VISITORS IN NC
(000)



13,099

NIGHTS IN NC
(000)



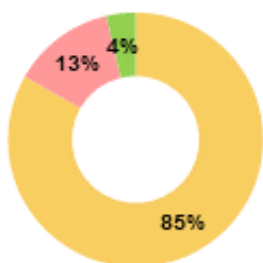
2,354

EXPENDITURE IN NC
(\$M)



Note: Purpose of visit shares provided only when statistically reliable

TRAVEL TYPE



266

VISITORS IN NC
(000)



International Overnight

2,266

NIGHTS IN NC
(000)



136

EXPENDITURE IN NC
(\$M)



■ Holiday
■ Visiting friends and relatives
■ Other

171

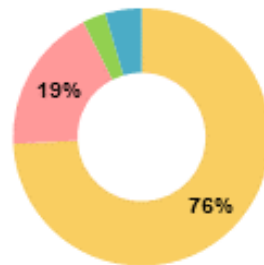
VISITORS IN NC
(000)

1,481

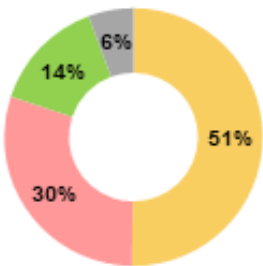
NIGHTS IN NC
(000)

90

EXPENDITURE IN NC
(\$M)



■ Holiday
■ Visiting friends and relatives
■ Business
■ Other



2,816

VISITORS IN NC
(000)



Domestic Overnight

9,201

NIGHTS IN NC
(000)



1,533

EXPENDITURE IN NC
(\$M)



■ Holiday
■ Visiting friends and relatives
■ Business
■ Other

3,166

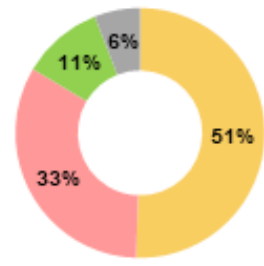
VISITORS IN NC
(000)

11,618

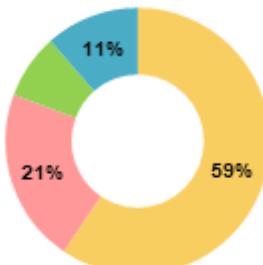
NIGHTS IN NC
(000)

1,935

EXPENDITURE IN NC
(\$M)



■ Holiday
■ Visiting friends and relatives
■ Business
■ Other



4,604

VISITORS IN NC
(000)



Domestic Daytrip

n/a

NIGHTS IN NC
(000)



504

EXPENDITURE IN NC
(\$M)

■ Holiday
■ Visiting friends and relatives
■ Business
■ Other

2,995

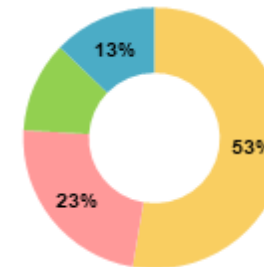
VISITORS IN NC
(000)

n/a

NIGHTS IN NC
(000)

328

EXPENDITURE IN NC
(\$M)



■ Holiday
■ Visiting friends and relatives
■ Business
■ Other

*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

Since 2011, NSW has secured events that have and will deliver over \$3.5 billion worth of visitor expenditure into the state.



NORTH COAST NSW EVENTS DELIVERED...

Domestic Overnight



334

VISITORS IN NC
(000)



Domestic Daytrip



515

VISITORS IN NC
(000)



985

NIGHTS IN NC
(000)



51

EXPENDITURE IN NC
(\$M)



249

EXPENDITURE IN NC
(\$M)



International event visitor data in North Coast are available but not statistically reliable.

SAMPLE OF NORTH COAST EVENTS

LARGE SCALE

Barbarians Tour
Byron Bay Bluesfest
Grafton Jacaranda Festival
IRONMAN Australia & IRONMAN 70.3 Port Macquarie
Kennards Hire Rally Australia
National Touch League
NSW Pro Surf Series - Great Lakes Pro
Splendour in the Grass

OTHER

Australian Little League Baseball Championships
Australian Senior League Baseball Championships
Bangalow Music Festival
Commonwealth Bank Women's Ashes Series
FFA National Youth Championships for Boys
Offshore Superboats Championships - Coffs Harbour
Sample Food Festival
Tastings on the Hastings
The Ballina Prawn Festival
The Wingham Akoostik Music Festival
Woolgoolah Curryfest





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



International
Visitors



Domestic
Overnight
Visitors



Daytrip
Visitors

Attend aboriginal performance	6%	n/a	n/a
Attend an organised sporting event	13%	*	*
Attend festivals / fairs or cultural events	24%	3%	*
Attend Movies/Cinema (2007 onwards)	25%	*	*
Attend theatre, concerts or other performing arts	15%	3%	*
Bushwalking / rainforest walks	58%	16%	*
Charter boat / cruise / ferry	45%	*	*
Cycling	16%	3%	*
Eat out / dine at a restaurant and/or cafe	94%	66%	55%
Exercise, gym or swimming	n/a	10%	*
Experience aboriginal art / craft and cultural display	20%	*	*
Fishing	7%	9%	*
Go on a daytrip to another place	n/a	5%	n/a
Go on guided tours or excursions	34%	*	*
Go shopping for pleasure	81%	19%	21%
Go to markets	61%	8%	*
Go to the beach	91%	49%	25%
Go whale or dolphin watching	23%	*	*
Golf	4%	*	*
Movies/videos	n/a	*	n/a
Other outdoor activities nfd	17%	*	*
Picnics or BBQs		5%	*
Play other sports	10%	*	*
Pubs, clubs, discos etc	66%	27%	7%
Sailing, windsurfing, kayaking	18%	n/a	n/a
Scuba diving	13%	*	n/a
Short educational course	3%	n/a	n/a
Sightseeing/looking around	86%	30%	21%
Snorkelling	35%	*	n/a
Surfing	29%	*	*
Tourist trains	12%	*	*
Visit a health spa / sanctuary / well-being centre	7%	*	*
Visit a reef	32%	*	n/a
Visit amusements / theme parks	12%	*	*
Visit an aboriginal site / community	13%	*	*
Visit art / craft workshops / studios	12%	*	*
Visit botanical or other public gardens	56%	3%	*
Visit breweries (2018 onwards)	11%	*	n/a
Visit casinos	14%	*	*
Visit farmgates (2016 onwards)	10%	*	*
Visit farms	19%	*	*
Visit food markets (2016 onwards)	n/a	3%	1%
Visit friends & relatives	n/a	43%	25%
Visit history / heritage buildings, sites or monument	45%	6%	*
Visit industrial tourist attractions / mines / breweries	n/a	1%	0%
Visit museums or art galleries	45%	4%	*
Visit national parks / state parks	72%	15%	*
Visit wildlife parks / zoos / aquariums	49%	*	*
Visit wineries	18%	*	*
Water activities / sports	n/a	5%	*

Note:

Items with an asterisk * 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

14,133

VISITORS IN NC
(000)



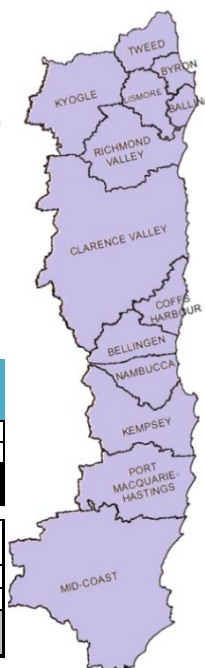
25,008

NIGHTS IN NC
(000)



4,578

EXPENDITURE IN NC
(\$M)



NORTHERN RIVERS

TOTAL Northern Rivers	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	7,686	266	2,816	4,604
Share of NC %	54%	73%	48%	58%
Nights (000)	11,427	2,226	9,201	
Share of NC %	46%	58%	43%	

Ballina (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	980	13	328	639
Share of NC %	7%	4%	6%	8%
Nights (000)	1,048	84	963	
Share of NC %	4%	2%	5%	

Byron (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	2,237	213	906	1,118
Share of NC %	16%	59%	16%	14%
Nights (000)	4,528	1,542	2,986	
Share of NC %	18%	40%	14%	

Clarence Valley (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,307	26	680	600
Share of NC %	9%	7%	12%	8%
Nights (000)	2,513	158	2,355	
Share of NC %	10%	4%	11%	

Lismore (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	768	13	238	517
Share of NC %	5%	4%	4%	7%
Nights (000)	770	143	628	
Share of NC %	3%	4%	3%	

Richmond Valley (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	324	*	143	*
Share of NC %	2%	-	2%	-
Nights (000)	462	*	448	
Share of NC %	2%	-	2%	

Tweed (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	2,077	27	587	1,463
Share of NC %	15%	7%	10%	18%
Nights (000)	1,953	258	1,695	
Share of NC %	8%	7%	8%	

MID NORTH COAST**

TOTAL Mid North Coast**	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	6,333	171	3,166	2,995
Share of NC %	45%	47%	54%	38%
Nights (000)	13,099	1,481	11,618	
Share of NC %	52%	38%	55%	

Bellingen (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	240	*	*	*
Share of NC %	2%	-	-	-
Nights (000)	533	*	*	
Share of NC %	2%	-	-	

Coffs Harbour (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,760	86	871	802
Share of NC %	12%	24%	15%	10%
Nights (000)	3,355	786	2,569	
Share of NC %	13%	20%	12%	

Kempsey (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	474	11	268	*
Share of NC %	3%	3%	5%	-
Nights (000)	1,379	36	1,342	
Share of NC %	6%	1%	6%	

Mid-Coast (A)**	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	2,224	30	1,135	1,059
Share of NC %	16%	8%	19%	13%
Nights (000)	4,296	248	4,048	
Share of NC %	17%	6%	19%	

Nambucca (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	310	*	166	*
Share of NC %	2%	-	3%	-
Nights (000)	579	*	535	
Share of NC %	2%	-	3%	

Port Macquarie-Hastings (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,583	76	819	688
Share of NC %	11%	21%	14%	9%
Nights (000)	2,957	310	2,647	
Share of NC %	12%	8%	13%	

Other area that make up Northern Rivers includes Kyogle for which data is 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 is available but not statistically reliable.



North Coast DN overnight expenditure **to grow by \$942.3M to \$4.3B** over the next 10 years!

TOTAL VISITOR NIGHTS IN NEW SOUTH WALES

	Purpose of visit				Holiday		VFR ^a		Business		Other		All purpose		State total
	Holiday	VFR ^a	Business	Other ^c	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	
	Year-on-year change (%)														
2017-18	6.8	3.5	1.7	4.7	9.3	5.0	6.3	0.7	1.3	2.1	6.2	-0.9	6.6	2.6	4.8
2018-19	3.8	4.3	3.7	6.2	5.7	2.4	5.9	2.7	3.0	4.5	6.3	6.0	5.7	3.1	4.5
2019-20	3.5	4.5	3.8	5.0	5.2	2.1	6.0	2.8	4.1	3.6	5.2	4.2	5.3	2.7	4.2
2020-21	3.2	4.2	3.2	5.0	4.7	1.9	5.8	2.5	3.0	3.4	5.1	4.4	5.0	2.5	3.9
2021-22	3.4	4.0	3.3	4.8	5.2	1.9	5.3	2.4	3.1	3.5	5.0	4.1	4.9	2.5	3.9
	5-year average annual growth rate (%)														
2016/17-2021/22	4.1	4.1	3.1	5.2	6.0	2.6	5.9	2.2	2.9	3.4	5.6	3.5	5.5	2.7	4.3
2021/22-2026/27	3.3	4.0	3.2	4.5	5.0	1.8	5.4	2.3	3.1	3.3	4.7	3.9	4.8	2.4	3.8
	10-year average annual growth rate (%)														
2016/17-2026/27	3.7	4.1	3.2	4.8	5.5	2.2	5.6	2.3	3.0	3.4	5.1	3.7	5.2	2.5	4.1

According to Tourism Research Australia's latest State Nights forecast, Tourism Nights in Regional NSW is expected to grow by 2.5% pa over the next 10 years.

Should this hold true and North Coast DN's share of state hold constant, then the value of Overnight Visitor expenditure in the region could reach \$4.3 billion by 2026/ 27 from \$3.4 billion in 2016/17.*

INBOUND VISITOR NIGHTS IN NEW SOUTH WALES

	Purpose of visit				Holiday		VFR ^b		Business		Other		All purpose			
	Holiday ^a	VFR ^b	Business	Other ^c	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	State total	
	Year-on-year change (%)															
	2017-18	11.0	9.5	7.3	7.3	10.9	11.9	8.7	13.2	9.6	-6.5	7.4	6.3	8.8	9.8	9.0
	2018-19	6.4	7.4	1.9	6.3	6.6	5.4	7.9	5.5	0.8	9.9	6.3	6.1	6.6	5.8	6.5
	2019-20	5.9	7.7	5.9	5.1	6.0	5.1	8.0	6.5	6.3	3.0	5.2	4.5	6.2	5.3	6.0
	2020-21	5.2	7.2	2.3	5.2	5.4	4.4	7.7	5.3	2.4	1.5	5.2	5.0	5.7	4.8	5.6
	2021-22	5.8	6.6	3.0	4.9	6.0	5.0	6.9	5.2	2.8	4.7	5.0	4.3	5.7	4.8	5.6
	5-year average annual growth rate (%)															
	2016/17-2021/22	6.8	7.7	4.1	5.8	7.0	6.3	7.8	7.1	4.3	2.4	5.8	5.2	6.6	6.1	6.5
2021/22-2026/27	5.6	6.5	3.2	4.6	5.8	4.8	6.8	5.1	3.3	2.9	4.7	4.2	5.5	4.7	5.4	
10-year average annual growth rate (%)																
2016/17-2026/27	6.2	7.1	3.6	5.2	6.4	5.6	7.3	6.1	3.8	2.6	5.3	4.7	6.1	5.4	5.9	

DOMESTIC VISITOR NIGHTS IN NEW SOUTH WALES

	Purpose of visit				Holiday		VFR ^b		Business		Other		All purpose		State total	
	Holiday	VFR ^b	Business	Other ^c	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state	Capital city	Rest of state		
	Year-on-year change (%)															
	2017-18	4.0	-0.5	0.5	-8.1	3.9	4.0	2.1	-1.6	-1.8	2.5	-7.3	-8.6	0.4	1.1	0.9
	2018-19	2.0	2.1	4.1	5.8	2.3	1.9	2.0	2.1	3.9	4.3	5.8	5.9	3.0	2.5	2.6
	2019-20	1.6	2.0	3.4	4.1	1.9	1.6	2.0	2.1	3.2	3.6	4.6	3.8	2.6	2.1	2.2
	2020-21	1.6	1.8	3.4	4.1	1.8	1.5	1.7	1.8	3.2	3.5	4.5	3.7	2.5	2.0	2.1
	2021-22	1.4	1.8	3.3	4.0	1.7	1.4	1.7	1.8	3.2	3.5	4.4	3.7	2.4	1.9	2.1
	5-year average annual growth rate (%)															
	2016/17-2021/22	2.1	1.4	3.0	1.8	2.3	2.1	1.9	1.2	2.3	3.5	2.3	1.6	2.2	1.9	2.0
2021/22-2026/27	1.2	1.6	3.2	3.8	1.4	1.2	1.6	1.7	3.1	3.3	4.2	3.5	2.3	1.8	1.9	
10-year average annual growth rate (%)																
2016/17-2026/27	1.7	1.5	3.1	2.8	1.9	1.6	1.7	1.4	2.7	3.4	3.2	2.5	2.2	1.9	2.0	

* Modelled on TRA inbound and domestic 10 year CAGR against a static share of visitor night for North Coast DN, 2.5% CPI included.

Source: Tourism Research Australia, International & National Visitor Surveys

Note: Tourism Forecasts are only available for NSW, Sydney and total Regional NSW. Forecasts for the DNs were estimated based on visitor nights and expenditure per night of the tourism regions within each DN.