

# Visitation Report

## Ballina LGA

Year-end December 2022



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## Key Performance Indicators

The data for this report is sourced from the National Visitor Survey produced by Tourism Research Australia, based on data for the year-end December 2022 for the Ballina LGA. The results demonstrate a strong recovery from the Covid-19 lockdowns and travel restrictions as shown below:

- Total visitation increased by 34% from the previous year to 832,000 domestic visitors.
- Domestic overnight visitors increased 10% on the previous year with approximately 313,000 visitors spending 0.9 million nights in the Ballina LGA – at an average stay of 3.1 nights.
- Day visitors also rebounded strongly from the previous year by 54% to 519,000 visitors.

Across Australia, international visitation has not been reported since March 2020, when Covid\_19 travel restrictions interrupted data collection from tourist arrivals. Prior to that time the number of international overnight travellers to Ballina LGA was approximately 14,000.

### KEY VISITATION INDICATORS

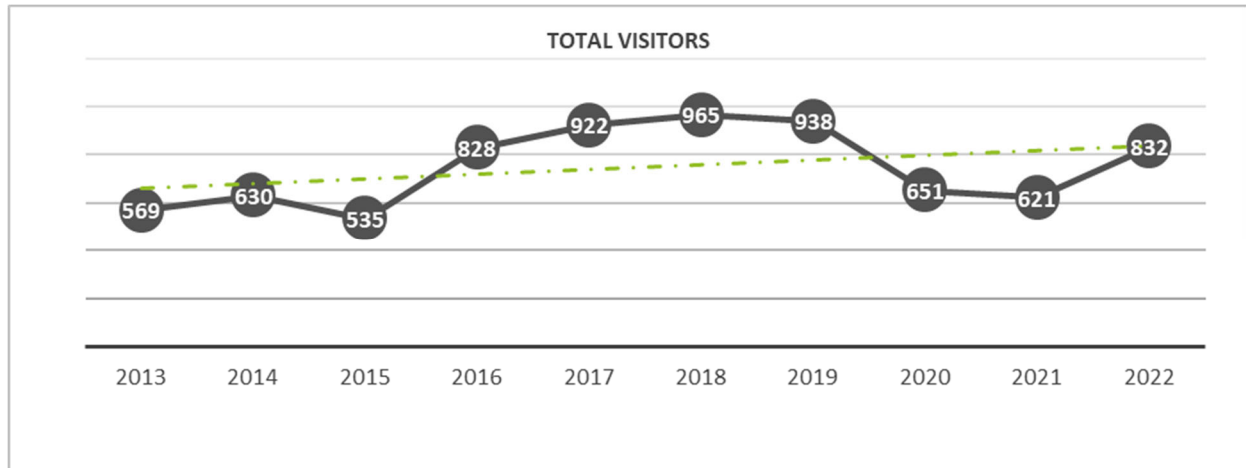
Year-end December '000	2018	2019	2020	2021	2022	5 year average
<b>Domestic overnight visitors</b>	<b>324</b>	<b>433</b>	<b>253</b>	<b>285</b>	<b>313</b>	<b>322</b>
% change	<b>0%</b>	<b>34%</b>	<b>-42%</b>	<b>13%</b>	<b>10%</b>	<b>3%</b>
<b>Domestic nights</b>	<b>950</b>	<b>1,266</b>	<b>810</b>	<b>928</b>	<b>965</b>	<b>984</b>
% change		<b>33%</b>	<b>-36%</b>	<b>15%</b>	<b>4%</b>	<b>4%</b>
av night stay	<b>2.9</b>	<b>2.9</b>	<b>3.2</b>	<b>3.3</b>	<b>3.1</b>	<b>3.1</b>
<b>Domestic day visitors</b>	<b>625</b>	<b>492</b>	<b>386</b>	<b>336</b>	<b>519</b>	<b>472</b>
% change	<b>7%</b>	<b>-21%</b>	<b>-22%</b>	<b>-13%</b>	<b>54%</b>	<b>1%</b>
<b>International visitors</b>	<b>13</b>	<b>16</b>	<b>3</b>			
<b>International Nights</b>	<b>84</b>	<b>138</b>	<b>41</b>			
av night stay	<b>6.5</b>	<b>8.6</b>	<b>13.7</b>			
<b>Total Visitors</b>	<b>962</b>	<b>941</b>	<b>642</b>	<b>621</b>	<b>832</b>	<b>793</b>
% change	<b>6%</b>	<b>-2%</b>	<b>-32%</b>	<b>-3%</b>	<b>34%</b>	<b>1%</b>
<b>Total Nights</b>	<b>1,034</b>	<b>1,404</b>	<b>851</b>	<b>928</b>	<b>965</b>	<b>1,036</b>

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

## 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 back toward the highs seen in 2018 and 2019. As shown the growth rate over the 10 year timeframe is trending upward at a rate of 7% per year.

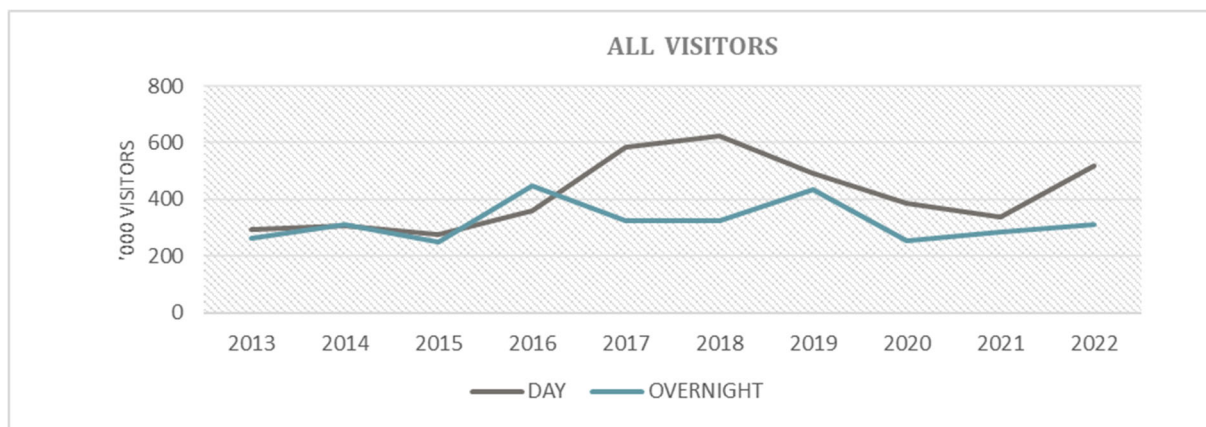
### TEN YEAR VISITATION TRENDS



The growth of **overnight visitors** has been positive over the past 10 years with an average growth rate of 7%. As shown below, following the dip in 2020, the last two years have maintained positive growth of around 10%. The increase of 10% from 2021 to 2022 is slightly less than the trend to other NSW Regional areas where the number of domestic overnight trips has rebounded by 33% in 2022<sup>1</sup>.

The numbers of **day visitors** has also increased by an average growth rate of 10% over the past 10 years. The increase of 54% from 2021 to 2022 is slightly more than the trend in other NSW Regional areas where day visits have increased by 37% in 2021-22<sup>1</sup>.

### OVERNIGHT AND DAY VISITATION



<sup>1</sup> [www.tra.gov.au/data-and-research/reports/national-visitor-survey-results/national-visitor-survey-results](http://www.tra.gov.au/data-and-research/reports/national-visitor-survey-results/national-visitor-survey-results).

## Source markets

In 2022, the majority of domestic overnight visitors came from Qld, with half of the overnight visitors (52%) and a third of day visitors (34%) residing in Qld. The surrounding areas of the NSW North Coast are also a strong source market, although more as a day visit than overnight. Notably, there were less overnight visitors from Sydney in 2022 than during the pandemic.

The area received a larger ratio of interstate visitors this year with a total of 68% overnight and 34% day visitors from interstate. There were an increased number of visitors from Victoria (12%) returning to levels last seen in 2018.

Day visitors predominantly came from many neighbouring areas of NSW North Coast (64%) (mainly Lismore 9%, Casino 7% and Maclean 9%), however an increased number came from the Gold Coast (20%).

### DOMESTIC SOURCE MARKETS (YEAR-END DECEMBER 2022)

State	Region	Overnight 2022	Overnight 5 year av	Day 2022	Day 5 year av
NSW	Sydney	13%	16%	2%	<1%
	North Coast NSW	4%	14%	64%	71%
	Hunter	5%	5%		
	Central Coast	4%	3%		
	New England North West	4%	3%		
	Other NSW	1%	3%		2%
		31%	46%	66%	73%
QLD	Brisbane	35%	29%	11%	10%
	Gold Coast	11%	9%	20%	16%
	Sunshine Coast	2%	2%	3%	1%
	Other QLD	2%	2%		
		52%	44%	34%	27%
VIC	Melbourne	9%	3%		
	Other VIC	3%	4%		
		12%	7%		
Other States	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

## Reason for visit

In 2022, 48% of domestic overnight visitors came to Ballina for the purpose of a **holiday**, while 34% were visiting friends and relatives, and 11% on business. This is in line with previous 5-year trends.

## Accommodation

50% of domestic overnight visitors stayed in commercial accommodation, while 50% stayed in private accommodation - VFR (33%) camping (10%) and private property (7%).

## Quarterly analysis

The recovery from the impact of Covid\_19 is showing in the Oct- Dec quarter with an increase in total visitors from the previous quarter of 66%. While it should be noted that some of this increase is seasonal, this increase is also 33% above the same quarter in the previous year.

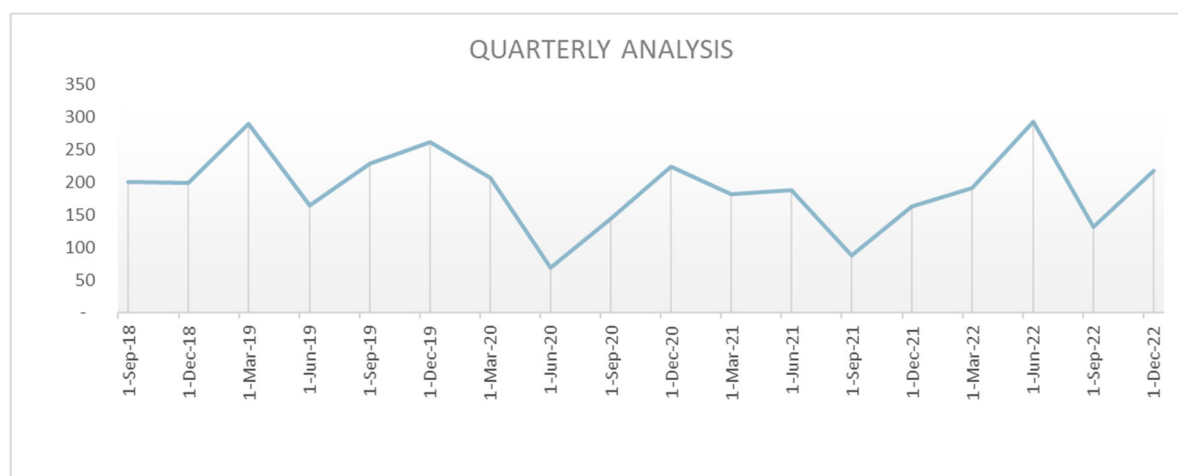
As shown there were increases in all four quarters from the previous year ^^.

### QUARTER ANALYSIS

Quarter '000	Jan-Mar 2022	Apr-June 2022	Jul-Sept 2022	Oct-Dec 2022	Annual year-end December
Domestic overnight visitors	92	79	59	83	313
% change on previous qtr	49%	-13%	-25%	41%	
Nights	271	301	160	232	964
% change on previous qtr	11%	11%	-47%	45%	
av night stay	3.0	3.8	2.7	2.8	3.1
Domestic day visitors	100	213	72	134	519
% change on previous qtr	-2%	113%	-66%	86%	
total visitors	191	292	131	217	831
% change on previous qtr	17%	53%	-55%	66%	
% change on same qtr previous year ^^	6%	55%	49%	33%	

## Year to date analysis

Analysis of each quarter over the past five years shows the highest quarter as being from March to June 2022. It should be noted that this was a time of recovery in the LGA from major regional flooding, which may also impact results. The impacts of major lockdowns in September 2021 and June 2020 can clearly be seen in this chart.



## Competitor Analysis

When looking at the end of the 2022 calendar year across different North Coast destinations, there has been positive change on the previous year for all LGAs - and yet the impacts on domestic visitors has been varied amongst them. Ballina LGA has had one of the highest increases in total visitation in the region, along with Byron Bay and Lismore, while Coffs Coast and Port Macquarie had lower overall increases.

		2018	2019	2020	2021	2022	change on previous year
Ballina	Domestic overnight	324	433	253	285	313	10%
	Domestic day	625	492	386	336	519	54%
	International	16	12	-	-	-	-
	Total	965	937	639	621	832	34%
Coffs Coast	Domestic overnight	974	1,062	786	774	928	20%
	Domestic day	915	954	933	880	787	-11%
	International	94	96	71	-	-	-
	Total	1,983	2,112	1,790	1,654	1,715	4%
Lismore	Domestic overnight	235	212	181	138	164	19%
	Domestic day	503	745	370	359	465	30%
	International	13	11	9	-	-	-
	Total	751	968	560	497	629	27%
Byron Bay	Domestic overnight	909	1,014	523	613	713	16%
	Domestic day	1,088	1,172	423	516	739	43%
	International	201	225	151	-	-	-
	Total	2,198	2,411	1,097	1,129	1,452	29%
Port Macquarie	Domestic overnight	821	880	685	610	816	34%
	Domestic day	694	855	691	780	613	-21%
	International	75	81	50	-	-	-
	Total	1,590	1,816	1,426	1,390	1,429	3%
North Coast	Domestic overnight	5,707	6,402	4,305	4,322	5,490	27%
	Domestic day	7,416	8,510	5,558	5,221	5,902	13%
	International						-
	Total	13,123	14,912	9,863	9,543	11,392	19%

TRA data is recorded at SA2 level to include the following areas for the LGA of Ballina Coast and Hinterland

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

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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. 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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