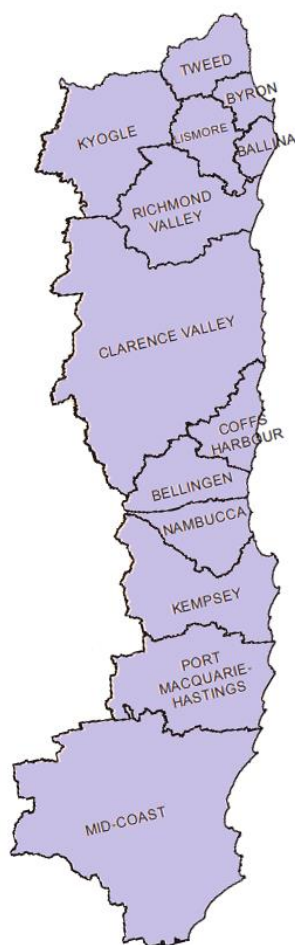




Destination
North Coast NSW

The Value of Tourism to North Coast 2019



**Every minute of every day,
Tourism delivers \$9,787 of
visitor spend into
North Coast**

**That is almost \$14.1 million per day!!
A value that has grown by 13.5%
in the last year alone.**



Tourism delivers **9.5%** of our jobs, supports **7,394** businesses and directly delivers **6.8%** of our region's Gross Value Add (GVA) which has grown every year since 2010/11 at an average **4.5%** pa.

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

The NSW Visitor Economy (3.0% direct share of state GVA) is worth more than Agriculture, Forestry and Fishing combined (1.6% share of state total) and scores just below Mining (3.3% 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 (\$25.8 billion)
2. Tourism (\$21.6 billion)
3. Manufacturing (\$13.4 billion)

EMPLOYMENT DUE TO TOURISM

Tourism's DIRECT Contribution to Employment

FULL TIME 11,120

PART TIME 13,453

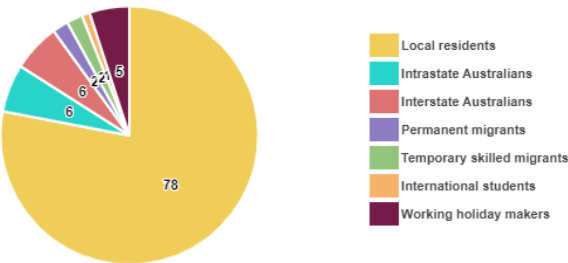


Supporting our local economy, Tourism supplies 9.5% of the region's employment including 24,632 persons who are directly employed and a further 9,905 who are indirectly employed.

There are 7,394 tourism related businesses in North Coast DN, around 19% of all Regional NSW Tourism businesses.

BUSINESSES RELYING ON TOURISM

Economically, tourism businesses directly deliver \$1.7 billion (6.8%) of the region's GVA – over 80% of Which is delivered 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		
		Establishments	Rooms	Room nights available (000)	Room nights occupied (000)	Room occupancy rate	Takings from accommodation	Average daily rate	Revenue per available room
YE		no.	no.	no.	no.		\$ millions	\$	\$
North Coast	Dec-2019	313	10,068	3,674	2,469	67.2%	456	185	124
	%Ch on 2018	0.0%	0.3%	0.6%	5.2%	2.9ppts*	8.0%	2.6%	7.3%

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

*percentage point change



Domestic direct inbound flights have increased in 2019 with a total of 10,616 flights (+0.4% yoy) delivering 849,143 seats (-0.8% 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.

Sources: Tourism Research Australia, State Tourism Satellite Accounts, 2018-19; Official Airline Guide OAG 2019, STR Tourist Accommodation 2019; Department of Foreign Affairs and Trade, Australia's Trade by State and Territory 2018-19

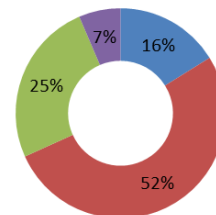
North Coast DN is **Number 1 DN** in terms of Visitor nights!

ECONOMIC VALUE OF TOURISM

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

North Coast has a substantial Domestic tourism market.

North Coast \$5.7 b
Share of DN consumption



- Day trips
- Intrastate overnight
- Interstate overnight
- International

North Coast DN visitation has grown over 37% since 2016 in terms of visitor expenditure value.

NORTH COAST DN TOTAL

15,530

VISITORS IN NC
(000)



28,450

NIGHTS IN NC
(000)



5,144

EXPENDITURE IN NC
(\$M)



TRAVEL TYPE

ORIGIN

International Overnight



375

VISITORS IN NC
(000)



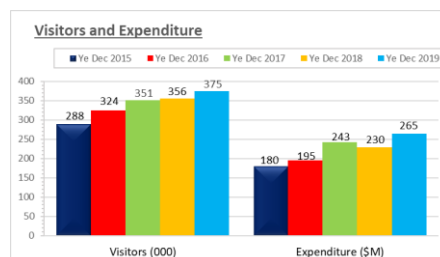
4,171

NIGHTS IN NC
(000)



265

EXPENDITURE IN NC
(\$M)



Share of International visitors to North Coast DN				
Top Origin	Share of Visitors		Share of Expenditure	
	YE Dec 18	YE Dec 19	YE Dec 18	YE Dec 19
UK	19.2%	18.3%	16.3%	16.3%
Germany	11.2%	10.8%	6.6%	5.1%
New Zealand	9.8%	9.6%	9.9%	8.6%
USA	9.4%	8.5%	9.8%	7.2%
China	3.7%	4.8%	3.6%	12.9%

Origin Region	Share of Visitors	
	YE Dec 18	YE Dec 19
Europe	55.2%	54.6%
North America	14.1%	12.4%
Asia	13.7%	16.4%
Other Countries	17.0%	16.6%

Domestic Overnight



6,477

VISITORS IN NC
(000)



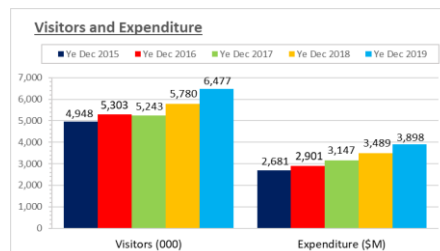
24,279

NIGHTS IN NC
(000)



3,898

EXPENDITURE IN NC
(\$M)



Origin	Share of Visitors		Share of Expenditure	
	YE Dec 18	YE Dec 19	YE Dec 18	YE Dec 19
Regional NSW	36.0%	37.8%	31.5%	32.7%
Sydney	27.7%	24.6%	32.1%	30.5%
Total Intrastate	63.6%	62.4%	63.6%	63.2%
Queensland	27.4%	28.5%	22.4%	22.7%
Victoria	5.9%	5.9%	9.5%	9.8%
ACT	1.6%	1.0%	2.3%	1.8%
Other Interstate	1.4%	2.1%	2.2%	2.5%
Total Interstate	36.4%	37.6%	36.4%	36.8%

Domestic Daytrip



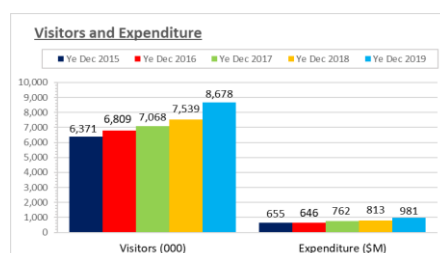
8,678

VISITORS IN NC
(000)



981

EXPENDITURE IN NC
(\$M)



Origin	Share of Visitors		Share of Expenditure	
	YE Dec 18	YE Dec 19	YE Dec 18	YE Dec 19
Interstate	27.7%	28.9%	27.9%	24.4%
Intrastate	72.3%	71.1%	72.1%	75.6%

NORTHERN RIVERS

8,590

VISITORS IN NC
(000)



13,928

NIGHTS IN NC
(000)



2,664

EXPENDITURE IN NC
(\$M)



MID NORTH COAST*

7,284

VISITORS IN NC
(000)



14,349

NIGHTS IN NC
(000)



2,443

EXPENDITURE IN NC
(\$M)



Note: Purpose of visit shares provided only when statistically reliable

TRAVEL TYPE

282

VISITORS IN NC
(000)



International Overnight

2,374

NIGHTS IN NC
(000)



186

EXPENDITURE IN NC
(\$M)



183

VISITORS IN NC
(000)

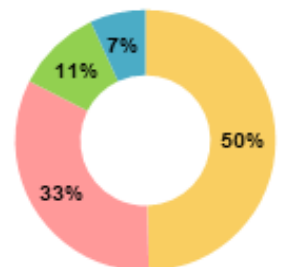
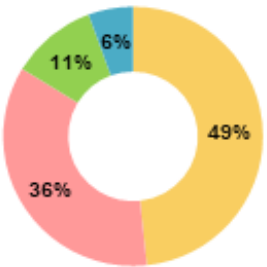
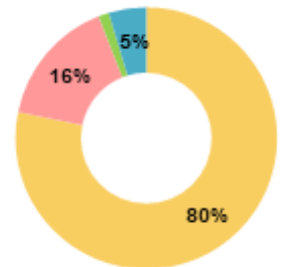
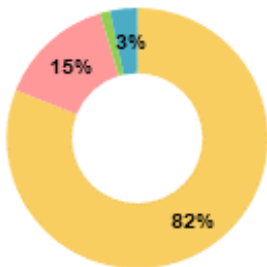
International Overnight

1,789

NIGHTS IN NC
(000)

78

EXPENDITURE IN NC
(\$M)



3,251

VISITORS IN NC
(000)



Domestic Overnight

11,554

NIGHTS IN NC
(000)



1,954

EXPENDITURE IN NC
(\$M)



3,480

VISITORS IN NC
(000)

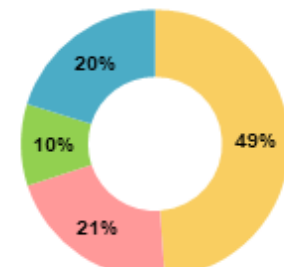
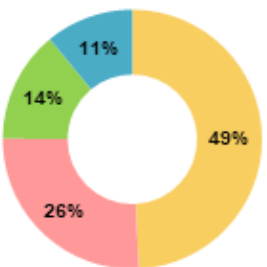
Domestic Overnight

12,561

NIGHTS IN NC
(000)

1,908

EXPENDITURE IN NC
(\$M)



5,057

VISITORS IN NC
(000)



Domestic Daytrip

524

EXPENDITURE IN NC
(\$M)



3,621

VISITORS IN NC
(000)

Domestic Daytrip

458

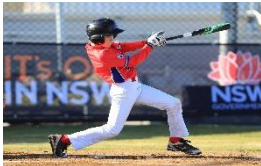
EXPENDITURE IN NC
(\$M)

*Mid North Coast includes the Mid-Coast LGA part of the Hunter region.

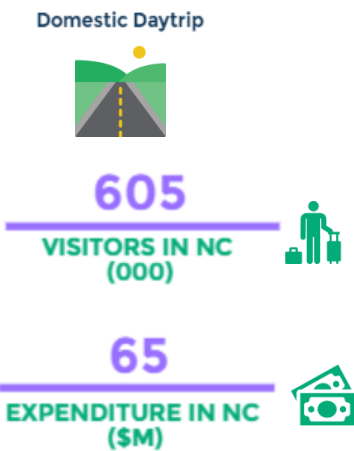


Events deliver visitors, visitor nights and visitor spend into North Coast DN

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...



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

SAMPLE OF NORTH COAST EVENTS

LARGE SCALE

- Australian Hockey U21 Championships
- Australian Ladies Classic - Golf
- Australian Little League Baseball Championships
- Australian Senior League Baseball Championships
- FFA National Youth Championships for Boys
- IRONMAN Port Macquarie
- Kennards Hire Rally Australia
- NSW State Team Readiness Camp
- SAE Australian Surf Championships
- Tour de Tweed (formerly Battle Recharge)
- Vissla NSW Pro Surf Series - Mothernest Great Lakes Pro
- Westfield FFA National Youth Championships for Girls

OTHER

- Ballina Food & Wine Festival
- BCU Coffs Tri
- BCU Woolgoolga MTB Festival
- Byron Bay Triathlon
- Casino Beef Week
- Elephant Trail Race
- Grafton Jacaranda Festival
- Hello Koalas Festival
- Lismore Lantern Parade
- Macksville Music Muster
- Mullum Music Festival
- National Touch League
- Sample Food Festival
- Treachery Adventure Festival
- Wintersun 2.0
- Woolgoogigla Curryfest
- Woolgoolga Blues & Berries Festival





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

Note: Activities of International visitors were undertaken in Australia, not necessarily in NSW



	International Visitors	Domestic Overnight Visitors	Daytrip Visitors
Attend aboriginal performance	4%	n/a	n/a
Attend an organised sporting event	10%	2%	*
Attend festivals / fairs or cultural events	22%	3%	*
Attend movies/cinema	24%	2%	*
Attend theatre, concerts or other performing arts	15%	2%	*
Birdwatching	15%	*	*
Bushwalking / rainforest walks	55%	16%	6%
Charter boat / cruise / ferry	41%	*	*
Cycling	14%	4%	*
Eat out / dine at a restaurant and/or cafe	95%	65%	51%
Exercise, gym or swimming	n/a	11%	4%
Experience aboriginal art / craft and cultural displays	18%	*	*
Fishing	7%	9%	3%
Go on a daytrip to another place	n/a	6%	n/a
Go on guided tours or excursions	32%	*	n/a
Go shopping for pleasure	81%	18%	16%
Go to markets	60%	11%	4%
Go to the beach	93%	50%	23%
Go whale or dolphin watching	21%	*	*
Golf	4%	3%	*
Other outdoor activities nfd	16%	4%	*
Picnics or BBQs	n/a	4%	*
Play other sports	9%	4%	*
Pubs, clubs, discos etc	65%	29%	10%
Sailing, windsurfing, kayaking	18%	n/a	n/a
Scuba diving	13%	*	n/a
Short educational course	3%	n/a	n/a
Sightseeing/looking around	87%	31%	19%
Snorkelling	32%	*	n/a
Surfing	28%	6%	*
Tourist trains	12%	*	n/a
Visit a health spa / sanctuary / well-being centre	7%	*	n/a
Visit amusements / theme parks	15%	*	*
Visit an aboriginal site / community	11%	*	*
Visit art / craft workshops / studios	10%	*	*
Visit botanical or other public gardens	58%	3%	*
Visit breweries	12%	*	*
Visit casinos	13%	*	n/a
Visit distilleries	5%	*	*
Visit farmgates	8%	*	*
Visit farms	18%	2%	*
Visit food markets	n/a	2%	*
Visit friends & relatives	n/a	44%	29%
Visit history / heritage buildings, sites or monuments	44%	6%	*
Visit museums or art galleries	45%	3%	*
Visit national parks / state parks	72%	15%	6%
Visit or stay on an island	30%	*	n/a
Visit wildlife parks / zoos / aquariums	48%	2%	*
Visit wineries	16%	*	*
Water activities / sports	n/a	7%	*
None of these	*	7%	15%

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

15,530

VISITORS IN NC
(000)



28,450

NIGHTS IN NC
(000)



5,144

EXPENDITURE IN NC
(\$M)



NORTHERN RIVERS

TOTAL Northern Rivers

	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	8,590	282	3,251	5,057
Share of NC %	55%	75%	50%	58%
Expenditure (\$M)	2,664	186	1,954	524
Share of NC %	52%	70%	50%	53%

Ballina (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	942	16	433	492
Share of NC %	6%	4%	7%	6%
Expenditure (\$M)	374	9	329	36
Share of NC %	7%	4%	8%	4%

Byron (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	2,409	223	1,014	1,172
Share of NC %	16%	59%	16%	14%
Expenditure (\$M)	974	116	733	125
Share of NC %	19%	44%	19%	13%

Clarence Valley (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,467	27	715	726
Share of NC %	9%	7%	11%	8%
Expenditure (\$M)	451	6	341	104
Share of NC %	9%	2%	9%	11%

Lismore (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	994	12	217	766
Share of NC %	6%	3%	3%	9%
Expenditure (\$M)	191	14	84	94
Share of NC %	4%	5%	2%	10%

Richmond Valley (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	489	*	176	311
Share of NC %	3%	*	3%	4%
Expenditure (\$M)	99	*	70	28
Share of NC %	2%	*	2%	3%

Tweed (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	2,262	29	775	1,458
Share of NC %	15%	8%	12%	17%
Expenditure (\$M)	515	23	366	126
Share of NC %	10%	9%	9%	13%

Kyogle (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	202	*	*	*
Share of NC %	1%	*	*	*
Expenditure (\$M)	59	*	*	*
Share of NC %	1%	*	*	*

MID NORTH COAST**

TOTAL Mid North Coast**

	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	7,284	183	3,480	3,621
Share of NC %	47%	49%	54%	42%
Expenditure (\$M)	2,443	78	1,908	458
Share of NC %	47%	29%	49%	47%

Bellingen (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	336	7	131	*
Share of NC %	2%	2%	2%	*
Expenditure (\$M)	56	1	44	*
Share of NC %	1%	0%	1%	*

Coffs Harbour (C)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,803	98	950	755
Share of NC %	12%	26%	15%	9%
Expenditure (\$M)	714	46	541	127
Share of NC %	14%	18%	14%	13%

Kempsey (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	674	11	365	299
Share of NC %	4%	3%	6%	3%
Expenditure (\$M)	224	2	203	19
Share of NC %	4%	1%	5%	2%

Mid-Coast (A)**	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	2,569	36	1,203	1,329
Share of NC %	17%	10%	19%	15%
Expenditure (\$M)	669	13	512	144
Share of NC %	13%	5%	13%	15%

Nambucca (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	378	*	189	*
Share of NC %	2%	*	3%	*
Expenditure (\$M)	86	*	70	*
Share of NC %	2%	*	2%	*

Port Macquarie-Hastings (A)	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,812	78	880	855
Share of NC %	12%	21%	14%	10%
Expenditure (\$M)	694	14	538	142
Share of NC %	13%	5%	14%	14%

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

** Mid North Coast includes the Mid-Coast LGA part of the Hunter region.