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Terminology

The following terms and acronyms are used in this report.

**Byron**
Byron Shire Council or Byron Shire Council area

**Domestic Overnight Visitors**
Visitors to an area who live in a location within Australia and stayed at least one night

**Usual Resident Population**
Census count of people where they usually live

**Enumerated Population**
Census count of people where they were on the night of the Census

**Estimated Resident Population (ERP)**
ABS best estimate of actual resident population

**LGA**
Local Government Area

**NIEIR**
National Institute of Economic and Industry Research (National Economics)

**ABS**
Australian Bureau of Statistics

**TRA**
Tourism Research Australia

**Inside Airbnb**
A website that analyses Airbnb listings data
Key Findings
Key Findings - scale

This report presents analysis into the scale and impact of high visitation numbers in the Byron Shire Council area. Some key findings have been drawn out for an overview:

- In 2016/17, Tourism and Hospitality generated 23% of Byron’s jobs (3,506 jobs) and 14.1% of output/sales ($463M) in 2016/17. As a sector it would be Byron’s largest employer.

- Output and jobs generated by the sector were equivalent to Coffs Harbour which has an economy ($3.24B) and population (75,503) more than double Byron’s ($($1.7B; 33,987).

- In 2017/18, Byron was estimated to have had 2.0 million visitors.

- Half of Byron’s visitors stay overnight (domestic and international), compared to only 38% for the NSW as a whole.

- Recent growth has outpaced the state’s. Between 2014 and 2018, total visitation was estimated to have grown by 49%, compared to 11% for NSW.

- Daytrippers increased by 74% over the last decade, and domestic overnight visitors grew by 57%.

- Domestic visitor nights up 33% from 2006/07, international nights up 18%.

- Events travel is a key market. In the three years to 2017/18, Byron supported 3.3% of NSW’s events based trips including 8.3% of NSW’s events based overnight travel.

- Byron’s visitation is similar to much larger cities such as Launceston and Townsville.

- Byron has similar visitation to tourist destinations like the Great Ocean Road, but 4 times the amount of international visitors stay overnight.

- Byron Bay is the 4th most visited destination in NSW and the 11th most visited in Australia amongst international visitors.

- Byron Ballina Airport caters to half a million passengers each year and over the last five years was the fastest growing airport amongst Australia’s top 20.

- International visitor nights forecast to grow by 900,000 over the next decade, domestic nights by 700,000.
Key Findings - impact

Byron had an enumerated population of 33,624, 6.6% higher than its usual resident population (31,556), equivalent to over 2,000 extra people. This was six times the state average.

Byron had an average of 14,000 visitors in the LGA each day in 2017/18 with 11,100 being overnight visitors. This is higher than all locations in NSW’s north coast.

If added to the resident population this would represent a 45% addition.

If the same methodology is applied to all LGAs, Byron’s ‘serviceable population’ is greater than Orange, Bathurst and Lismore.

The cost of servicing this temporary population is estimated at $23 million per year.

Peak visitation months sees considerable congestion on Byron’s roads. A 5 minute traffic delay in Byron Bay could generate almost $10,000 per day in travel time costs.

Private rental accommodation is more commonly used by visitors in Byron than elsewhere in NSW. In the three years to 2016/17, 17% of domestic overnight visitors used rental properties, double most benchmarks. Byron has more Airbnb listings than all but 3 Greater Sydney LGAs.

Short term rentals are linked to unoccupied dwellings which represent 13.2% of all Byron’s dwelling stock compared to 9.3% for the state.

Properties used for holiday renting attract higher prices due to their revenue stream. In 2017, The median dwelling price in Byron was $865,0001. This was $225,000 more than the NSW average

The estimated median price for a house in Byron Bay was $1.5 million and rent was $900/week.

This places housing costs pressure on existing residents as in 2016, Byron had a lower median household income ($1,149 per week) than the state ($1,486), however the median rent ($400) was higher (NSW - $380).
Tourism in Byron Shire
Byron Shire is located on the Far North Coast of New South Wales, about 800 kilometres north of the Sydney CBD and 200 kilometres south of the Brisbane CBD.
Byron’s attractions reflect its coastal location and access to sub-tropical hinterland

Most destinations and activities are connected to the outdoors and nature, including:

- **Beaches** – Belongil, Byron Bay, Wategos, Broken Head
- **Active sports** – Surfing, Windsurfing, snorkeling, cycling, hiking
- **Local produce** – Farmers markets, The Farm, Stone & Wood Brewery, Byron Bay Cookies
- **Health and wellbeing** – day spas, yoga retreats, Crystal castle & Shambala gardens
- **Festivals** – Splendour in the Grass, Byron Bay Bluesfest, Falls Festival
Byron has an average hotel offer for its population size
However, its Airbnb offer is extraordinary

Byron Shire has more Airbnb listings than most LGAs in Greater Sydney, except for the City of Sydney, Waverly Council area (Bondi Beach) and the City of Randwick. However, the average nights per year occupied in Byron Shire (72 nights per year per listing) is much higher than Waverly and Randwick (both 36) meaning total Airbnb nights is greater than Waverly and almost double the Randwick’s.¹

¹Inside Airbnb, 2018. For reference, City of Sydney average nights per year is 79.
Byron has a larger share of visitors who use short-term rentals

In the 3 years to 2017/18, 17% of domestic overnight visitors used rental properties, double most benchmarks.
Accommodation and attractions centred on Byron Bay
Tourism and hospitality is a substantial contributor to the economy
Tourism is vital to Byron’s economy

Tourism and Hospitality generated 23% of Byron’s jobs and 14% of output/sales in 2016/17. As a sector it would be Byron’s largest employer.

Output and jobs generated by the sector were equivalent to or greater than Coffs Harbour and Tweed which have economies ($3.2B; $3.3B) and populations (75,503; 94,857) effectively double Byron’s ($1.7B; 33,987)\(^1\)

\(^1\)NIEIR, 2018; ABS Regional Population Growth, Australia (3218.0) \(_{\text{v}}\)
Tourism can grow the economy without the constraint of population and local market limits

- Tourism brings external earnings and increases demand for local goods and services which is ‘multiplied’ throughout the local economy. Tourism is also job friendly as spending generates relatively more jobs per dollar than other industries.

In 2016/17, the flow-on impacts of direct Tourism and Hospitality activities in Byron was 1,600 jobs and $193m in output

Source: NIEIR, 2018
Tourism output has grown faster than benchmark LGAs

INDEXED CHANGE IN TOURISM AND HOSPITALITY OUTPUT/SALES, 2007 - 2017

Tourism and Hospitality output/sales grew by $57m between 2007 and 2017, or 14%

Source: National Institute of Economic and Industry Research (NIEIR)©, 2018. Compiled by .id the population experts
Visitation overview
Substantial growth in domestic visitors

In 2017/18, Byron was estimated to have had **2.0 million visitors**:

- **1,024,000** Day-trippers
- **818,000** Domestic Overnight Visitors (2.7 million nights)
- **201,000** International Visitors (1.3 million nights)

**Reason for trip:**

- **Holiday**: 18%
- **Visiting Family/Friends**: 3%
- **Business**: 5%
- **Other**: 6%

Half of Byron’s visitors stay overnight (domestic and international), compared to only 37% for the NSW as a whole.


Note: There are some clear limitations with annual TRA visitation data due to sampling variability. See Appendix for more detail.

*International visitors reason for trip based on 2016/17 due to issues related to data availability.*
Substantial growth in domestic visitors

Day-trippers grew by 74% in the last decade, and domestic overnight visitors grew by 57%. International visitors haven’t grown by as much.

VISITATION NUMBERS, 2007/08 - 2017/18

- Daytrips
- Domestic Overnight Trips
- International Visitors

Domestic visitor nights up 33% from 2007/08, international nights up 18%
Growth in visitation has outpaced NSW’s, especially in the last few years

INDEXED CHANGE IN TOTAL VISITATION, 2008/09 - 2017/18, 3 YEAR AVERAGES

Between 2014 and 2018, visitation was estimated to have grown by 49%, compared to 11% for NSW

Source: TRA, Unpublished data from the National Visitor Survey and International Visitor Survey, 2018. Compiled by .id the population experts
Byron’s share of NSW visitation far exceeds its population share

Looking at Byron Bay in particular, the share of NSW’s population is only 0.4% but its share of visitation is 2.1%

STATE POPULATION SHARES, 2017

- Tweed
- Port Macquarie-Hastings
- Coffs Harbour
- Ballina
- Byron

Share of NSW’s population

STATE VISITATION SHARES, 2017/18

- Byron
- Tweed
- Coffs Harbour
- Port Macquarie-Hastings
- Ballina

Share of NSW’s visitation

Source: ABS Cat 3218.0 Regional Population Growth, 2018. Compiled by. id the population experts

Events travel is a key market for Byron

More than 5% of Byron’s domestic visitors come to Byron to attend an event.

In the three years to 2017/18, Byron supported an estimated:

- 3.3% of NSW’s events based trips, including
- 8.3% of NSW’s events based overnight travel

SHARE OF VISITORS WHOSE MAIN REASON IS TO ATTEND AN EVENT, 3 YEAR AVERAGE TO 2017/18

Source: TRA, Unpublished data from the National Visitor Survey, 2018; Compiled by .id the population experts
Byron has more than double the visitation numbers of some LGAs with equivalent population

<table>
<thead>
<tr>
<th></th>
<th>Byron</th>
<th>Mount Barker (SA)</th>
<th>Bega Valley (NSW)</th>
<th>Southern Downs (Qld)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (ERP, 2017)</td>
<td>33,987</td>
<td>34,643</td>
<td>34,095</td>
<td>35,542</td>
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<tr>
<td>Day-trippers (2017/18)</td>
<td>1,024,000</td>
<td>659,000</td>
<td>451,000</td>
<td>504,000</td>
</tr>
<tr>
<td>Domestic Overnight Visitors (2017/18)</td>
<td>817,000</td>
<td>88,000</td>
<td>457,000</td>
<td>389,000</td>
</tr>
<tr>
<td>International Visitors (2017/18)</td>
<td>201,000</td>
<td>6,400</td>
<td>34,000</td>
<td>13,000</td>
</tr>
<tr>
<td>Total Visitation</td>
<td>2.04 million</td>
<td>753,000</td>
<td>942,000</td>
<td>906,000</td>
</tr>
</tbody>
</table>

Source: ABS Cat 3218.0 Regional Population Growth, 2016/17; TRA, Unpublished data from the National Visitor Survey and International Visitor Survey, 2018. N.B. Figures have been rounded for comparison purposes.
Byron’s visitation numbers match or exceed some much larger cities

<table>
<thead>
<tr>
<th></th>
<th>Byron</th>
<th>Launceston (Tas)</th>
<th>Townsville (QLD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (ERP, 2017)</td>
<td>33,987</td>
<td>67,004</td>
<td>193,601</td>
</tr>
<tr>
<td>Day-trippers (2017/18)</td>
<td>1,024,000</td>
<td>1,055,000</td>
<td>644,000</td>
</tr>
<tr>
<td>Domestic Overnight Visitors (2017/18)</td>
<td>817,000</td>
<td>617,000</td>
<td>918,000</td>
</tr>
<tr>
<td>International Visitors (2017/18)</td>
<td>201,000</td>
<td>118,000</td>
<td>101,000</td>
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<tr>
<td>Total Visitation</td>
<td>2.04 million</td>
<td>1.79 million</td>
<td>1.66 million</td>
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</tbody>
</table>


N.B. Figures have been rounded for comparison purposes.
Byron’s population and visitation equivalent to some other coastal tourist destinations, but with a higher share of international overnight visitors

<table>
<thead>
<tr>
<th>Key tourism destination</th>
<th>Byron</th>
<th>Bass Coast (Vic)</th>
<th>Surf Coast (Vic)</th>
<th>Busselton (WA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (ERP, 2017)</td>
<td>33,987</td>
<td>34,223</td>
<td>31,324</td>
<td>38,300</td>
</tr>
<tr>
<td>Day-trippers (2017/18)</td>
<td>1,024,000</td>
<td>1,380,000</td>
<td>1,284,000</td>
<td>698,000</td>
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<tr>
<td>Domestic Overnight Visitors (2017/18)</td>
<td>817,000</td>
<td>867,000</td>
<td>1,029,000</td>
<td>883,000</td>
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<tr>
<td>International Visitors (2017/18)</td>
<td>201,000</td>
<td>49,000</td>
<td>52,000</td>
<td>55,000</td>
</tr>
<tr>
<td>Total Visitation</td>
<td>2.04 million</td>
<td>2.30 million</td>
<td>2.36 million</td>
<td>1.64 million</td>
</tr>
</tbody>
</table>


N.B. Figures have been rounded for comparison purposes.
Byron Bay clearly one of Australia’s biggest tourist drawcards

In 2017/18, Byron Bay was estimated to be the

- **21st most visited destination** in Australia
- **4th most visited in NSW**

(after Sydney – Haymarket – The Rocks; Newcastle – Cooks Hill; and Wollongong East)

28th most visited for day-trips
14th most visited for domestic overnight stays
11th most visited by international tourists


*Destination defined as ABS Small Area Level 2
Byron region clearly one of Australia’s biggest tourist destinations

In 2017/18, Ballina Byron Gateway Airport had over half a million passengers and was the:

- 10th busiest regional airport in Australia
- 2nd busiest regional airport in NSW
- Fastest growing airport amongst Australia’s top 20 over the last five years

Source: BITRE, Airport Traffic Data, 2018
Many international visitors utilise Gold Coast Airport to access Byron; visitation expected to get an uplift off the back of 2018 Commonwealth Games

In 2016/17, Gold Coast Airport was:

- 6th busiest airport in Australia; 5th busiest for international passengers
- 2nd fastest growing airport for international passengers amongst Australia’s top 5 over the last five years
- Undergoing an expansion to improve capacity and meet a forecast growth of 10m passengers over the next 20 years

The 2018 Commonwealth Games attracted over 500,000 visitors to the Gold Coast

Source: Qld Government and City of Gold Coast

In 2016/17, 7% of all international visitors to Byron entered Australia from Gold Coast Airport

Source: BITRE, Airport Traffic Data, 2018; Gold Coast Airport Masterplan Airport Forecasts. Image source: www.goldcoastairport.com.au
International visitor nights forecast to grow by 900,000 over the next decade, domestic nights by 700,000

1 Keeping shares of Regional NSW Domestic and International Visitor nights constant
Socio-economic impact of Byron’s tourism
Byron’s actual regular population is a lot larger than its resident population

The 2016 Census records two different population estimates. The usual resident population incorporates those people who usually call a location home, whereas the enumerated population records where people were located on Census night. Tourist destinations usually have much larger enumerated populations. In 2016:

Byron had an enumerated population of 33,624, 6.6% higher than its usual resident population (31,556), equivalent to over 2,000 extra people. This was six times the state average.

Source: ABS Census of Population and Housing, 2016. Compiled by .id the population experts
The census likely undercounts the gap

The Census will likely undercount the average regular population in Byron due to a number of factors:

- It is recorded in August (Winter) which has lower visitation rates than some other months. For example, research has shown that amongst non-resident owned properties in Byron, August 2011 was the 4th lowest month by % of total days properties rented and 6th lowest month for usage by the owner.¹

- It is a snapshot at one point in time and therefore can not incorporate the fact that Byron hosts a number of festivals that regularly attract between 15 - 30,000 people per day

- It undercounts the number of international ‘temporary residents’ by a large amount*

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*At June 2016, the number of temporary visa holders was estimated at 1,060,410. The 2016 Census recorded 315,530 International Visitors on Census night. Source: Department of Immigration and Border Protection, 2016; ABS Census 2016.

¹Harris, K. & Hugo, G., 2013, Time and tide: moving towards an understanding of temporal population changes in coastal Australia
Visitor data provides another perspective of Byron’s substantial ‘extra’ population

Using TRA data of estimated day trippers and visitor nights, it is estimated that Byron had

- 14,000 visitors in the LGA on average each day (11,100 overnight visitors)

- This represents a 49% increase on the usual resident population count

If the same methodology is applied to all LGAs, Byron’s ‘serviceable population’ is greater than Orange, Bathurst and Lismore*

*Serviceable population = estimate resident population plus average daily visitors. LGA 2017 ERP (ABS) added to average daily visitation numbers (TRA 2017).
Peak visitor periods can cause considerable congestion costs

Anecdotal evidence and traffic count data highlights the increased congestion on Byron roads during peak travel months (Summer and April festival period). Congestion has a number of costs to communities, namely

- extra travel time
- extra travel time variability (where congestion can result in trip times becoming more uncertain)
- increased vehicle operating costs (primarily higher rates of fuel consumption), and
- poorer air quality (with vehicles under congested conditions emitting higher rates of pollutants)

During the peak holiday periods,

- A 5 minute traffic delay in Byron Bay could generate almost $10,000 per day in travel time costs

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1 Bureau of Transport and Regional Economics, 2007, Working Paper 71
2 Based on modelled number of workers in Byron Bay Destination Zone commuting by vehicle (ABS Census, 2011). Traffic counts of Freight vehicles using Ewingsdale Road (supplied by BCC), and Value of time costs from Transport NSW government Principles and Guidelines for Economic Appraisal of Transport Investment and Initiatives
A larger share of Byron’s dwelling stock is unoccupied

As shown earlier, Byron has a larger share of visitors who use short-term rentals. This is often associated with a larger share of unoccupied dwellings – houses/units that had no one living in them on Census night. Research has shown that these dwellings are often rented out for periods when the owner is not in residence\(^1\).

In 2016:

- 13.2% of Byron’s dwelling stock was unoccupied
- This is equivalent to just over 2000 dwellings
- In Byron Bay, it was 16.9%
- The average for NSW is 9.3%

\(^1\)Harris, K. & Hugo, G., 2013, Time and tide: moving towards an understanding of temporal population changes in coastal Australia
Short term rentals likely to be contributing to elevated house prices

Byron’s dwelling stock is much more expensive than the regional NSW average and well above benchmark areas. In 2017:

- The median dwelling price was $865,000\(^1\). This was $225,000 more than the NSW average.
- The estimated median price for a house in Byron Bay was $1.5 million and rent was $900/week\(^2\).
- The median rent for a 3 bedroom house was $600 per week, $180 more than the NSW average.

\(^1\)The median dwelling price is the median of all house and unit sales prices in the quarter. It includes prices for large dwellings with more than 3 bedrooms (26.5% of the dwelling stock in Byron) which can attract very large prices.

\(^2\) Byron Bay Suburb Profile, September 2017, realestate.com.au
Housing costs place a larger strain on Byron’s usual residents

Households in Byron face some challenges entering the housing market or meeting housing costs.

- Byron has a lower median household income ($1,149 per week) than the state ($1,486), however the median rent ($400) is higher (NSW - $380).
- 61% of households are in the bottom two household income quartiles, 56% of households are in the top two weekly rental payment quartiles.
- The share of households facing rental stress is 17.2%, compared to 12.9% for New South Wales.*

*Spending more than 30% of household income on rental payments. Source: ABS Census 2016 QuickStats
The rise of Airbnb impacts Council’s ability to generate enough revenue to service visitation

Byron’s Accommodation Industry is estimated to generate almost $100m year. However, it is estimated to have less registered accommodation providers and bed spaces (hotels, hostels, caravan parks) than other areas.¹

Private Airbnb listings generate considerable revenue that is not necessarily able to be taxed under traditional rate based methods and therefore contribute to servicing costs. According to Inside Airbnb data:

- Airbnb listings in Byron Shire likely generated almost $62.7m in revenue in 2017/18²
- This compares to only $15.6M for Tweed Shire.

¹In June 2016, Coffs Harbour had 37 hotels/motels (15+ rooms) with 3,588 bed spaces, Byron had 18 with 1,499 bed spaces. In 2010, Coffs Harbour had 58 hotel/motels/hostels with 5,401 bed spaces, Byron had 42 with 3,394 bed spaces. Coffs Harbour also had double the amount of caravan parks, 20 compared to Byron’s 10. Source: ABS 8635.0 Tourist Accommodation, Small Area Data

²Revenue figure is based on Inside Airbnb’s average price per night multiplied by estimated nights occupied by number of listings. Refer to Appendix for more details.
Byron tourism overview
A major contributor to the economy

In 2016/17, Tourism and Hospitality generated:

- 23% of Byron’s Jobs: 3,506
- 14% of Output: $463M

Byron’s visitors more likely to be from o/s and stay longer

In 2017/18, out of all visitors:

- 50% stayed at least one night
- 10% were international

Byron’s visitation numbers equivalent to larger regional cities

In 2017/18, Byron had:

- 2.0 million visitors
  (More than Coffs Harbour, Launceston and Mandurah)

Byron Bay one of Australia’s biggest tourist drawcards

In 2017/18, Byron Bay was estimated to be the:

- 4th most visited destination in NSW
**Ballina Byron Gateway Airport enables visitation**

- In 2017/18, the airport was:
  - Servicing 500,000 passengers
  - 2nd busiest in regional NSW
  - Fastest growing amongst Australia’s top 20 over previous 5 years

**Airbnb has changed the accommodation landscape**

- In 2018, Byron Shire had:
  - 2,912 listings
  - More than all but 3 of Greater Sydney’s LGAs

**Byron is an event/festival capital**

- In the three years to 2017/18, the shire supported:
  - 8.3% of NSW’s events based overnight travel
Byron’s actual population much larger than resident population

In 2016, there were:

Over 2,000 more people in Byron than usual residents recorded on Census night
The 6.6% gap is six times the state average

However, the Census undercounts average populations due to difficulties recording overseas visitors and seasonal variations. Using visitation data, in 2017/18, on average, there were:

An extra 14,000 visitors each day, 11,100 of which were staying overnight
This is a 45% increase on the usual resident count

Cost of servicing this ‘extra’ population is substantial

Using average per person service delivery costs, Byron’s high visitation would have a:

$23M annual servicing cost

Congestion during peak periods also has a social cost

A 5 minute traffic delay in Byron Bay could generate almost:

$10,000 per day in travel time costs

Holiday rentals drive up housing costs

Byron has a lower median household income than the state, however the median rent is higher.

17.2% of households face rental stress (NSW -12.9%)
Tourism Research Australia Data and limitations

The primary source of information on visitor numbers to LGAs are the National Visitor Survey (NVS) and International Visitor Survey (IVS) produced by Tourism Research Australia (TRA). Estimates produced as part of the NVS/IVS are based on a sample, rather than a census. As such, the results are subject to sampling variability.

.id usually applies a number of techniques to account for these sampling issues. These techniques include:

- Analysis is typically based on a three – five year average. This improves the sample sizes and validity of the data.
- Benchmarked to other regions to isolate regional/local effects
- Data from the ABS and other sources are used to support observations.

At the client’s request, we have reported annual point in time visitation date for 2017/18 in some slides. This data is presented with the caveat that due to sampling variability in individual years, users of the data should note make decisions based on this data alone.
Tourism and hospitality are key industries and major contributors to Australia’s economy. However it has not been well represented in economic profiles in the past, because it actually includes parts of many different traditional industries.

The Australian Bureau of Statistics publish the “Tourism Satellite Account” which is a separate set of national accounts which look at the value and contribution of tourism in the national economy.

This dataset presents National Economics microsimulation model of the tourism satellite account at the local level, showing the value of total sales and value add, as well as annual estimates of employment and FTE employment for the tourism sector.

Further information can be found at: http://economy.id.com.au/byron/tourism-value
Inside Airbnb

Airbnb data for the Northern Rivers region is freely available at http://insideairbnb.com/northern-rivers/

According to the site, a conservative occupancy model has been built in order to estimate Occupancy Rates, Income per Month and Nights per Year. More information on the methodology of the occupancy model can be found in the disclaimers.

Inside Airbnb: Northern Rivers uses the following parameters:

- A high availability metric and filter of 60 days per year
- A frequently rented filter of 60 days per year
- A review rate of 50% for the number of guests making a booking who leave a review
- An average booking of 3 nights unless a higher minimum nights is configured for a listing.
- A maximum occupancy rate of 70% to ensure the occupancy model does not produce artificially high results based on the available data