

BYRON SHIRE TOURISM MONITOR

Year ending December 2024

An independent report using official tourism data prepared each quarter for Byron Shire Council by Peter Valerio; Tourism Strategy Development Services.

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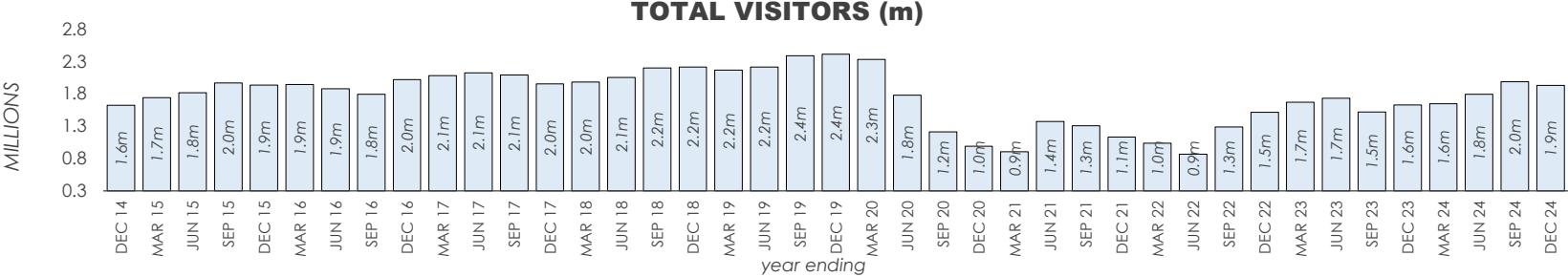
TOURISM STRATEGY DEVELOPMENT SERVICES
TOURISM MARKET RESEARCH ANALYSIS & STRATEGY DEVELOPMENT

Monitoring and analysing the tourism market for 30 years

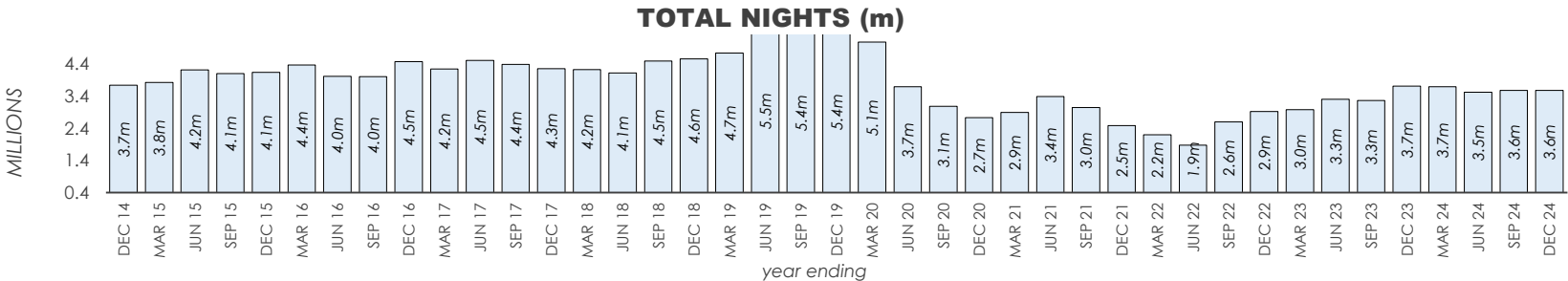
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OVERVIEW FOR THE YEAR ENDING DECEMBER 2024

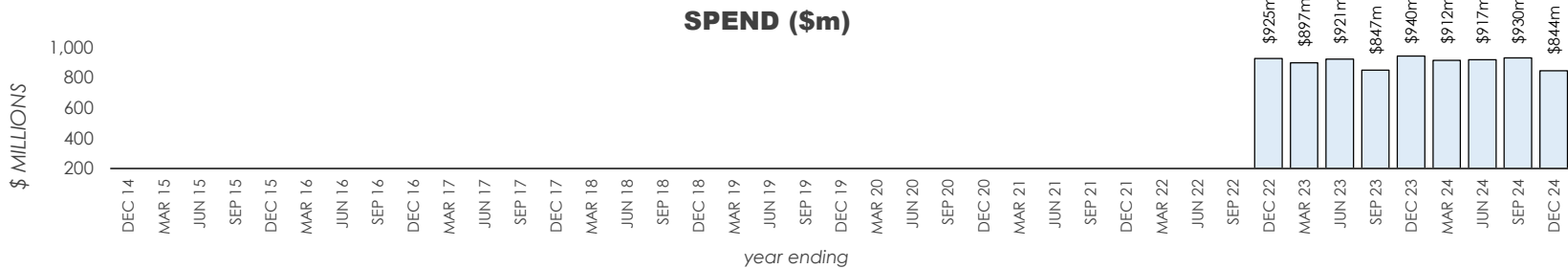
TOTAL VISITORS
1.9m
19% up YOY



TOTAL NIGHTS
3.6m
4% down YOY



SPEND ESTIMATE
\$844m
\$97m down YOY



DOMESTIC OVERNIGHT VISITORS

837,000; 12% up 2023*; Spend estimate \$623m

DOMESTIC VISITOR NIGHTS

2.1 million; 18% down on 2023* ; Average length of stay 2.5 nights (lowest in monitor).

DOMESTIC DAY VISITORS

916,000; 26% up on 2023* ; Spend estimate \$133m

INTERNATIONAL OVERNIGHT VISITORS

173,000; 16% up on 2023; Spend estimate \$88m

INTERNATIONAL VISITOR NIGHTS

1.5 million; 27% up on 2023.

*Refer respective page in monitor for an assessment of the statistical significance of this percentage change
Source: Data-extracted from Tourism Research Australia's National and International Visitor Survey datasets under licence by Peter Valerio. All data, and the differences between data points, and percentage share calculations are subject to sample survey error.

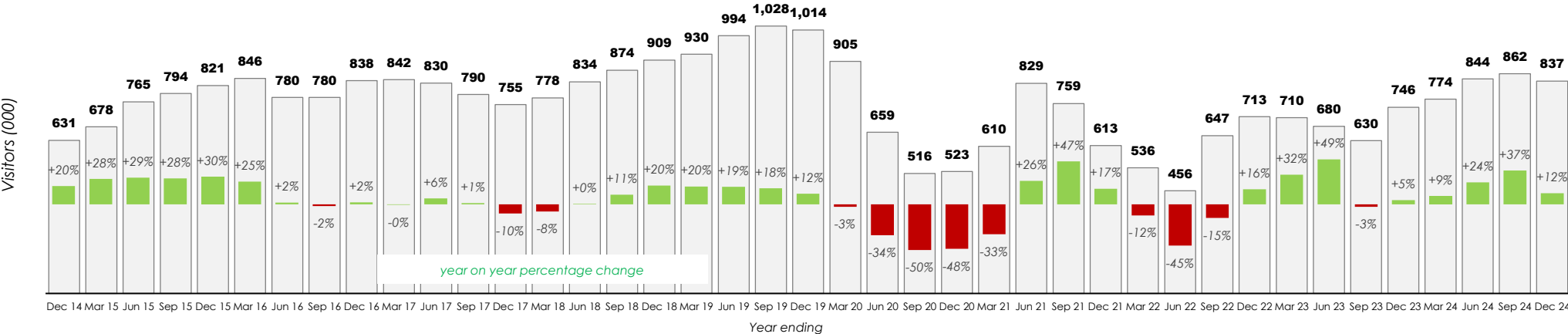
Domestic Overnight Visitors

KEY POINTS FOR THE YEAR ENDING DECEMBER 2024

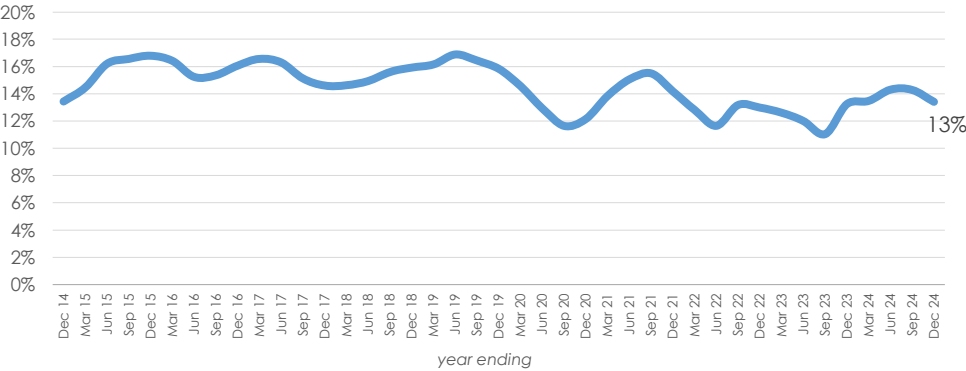
- 837,000 domestic overnight visitors.
- Highest calendar year since 2019.
- 12% up on 2023 but this is not a statistically significant change and whilst this should be reported accordingly it is nonetheless the 5th consecutive year-on-year (YOY) increase.
- The year-on-year change of +12% is almost identical to the North Coast Region (+11% YOY); favourable compared to Ballina (0% YOY) and unfavourable compared to Tweed (+19% YOY) but sample error could explain some of differences.
- Byron Shire's market share of the North Coast Region (13%) is identical to recent calendar years but below pre-Covid (2019 share was 16%). A long term declining trend in market share is evident.

EXPENDITURE ESTIMATE
If it is assumed that spend per night was the same as modelled by TRA for the years 2022-2023* (\$302 per night) total expenditure in the latest 12 month period was:
\$623 million

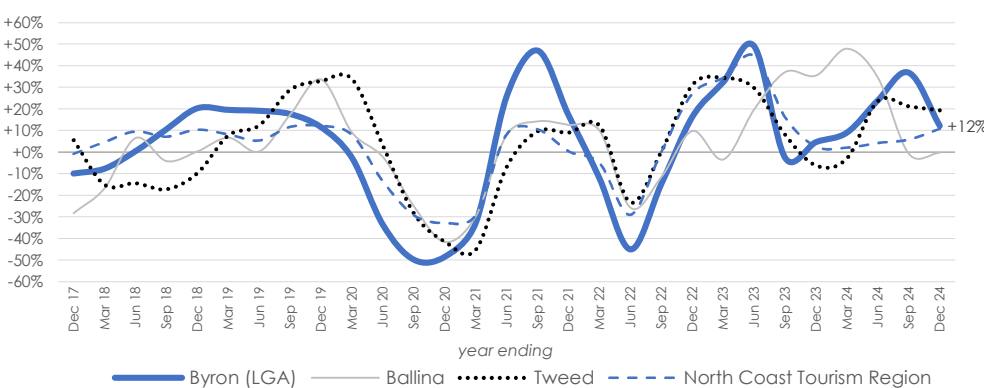
Byron LGA Domestic Overnight Visitors (000) & YOY % change



Market Share of North Coast Region



Domestic Overnight Visitors - Year-on-year % change comparison*



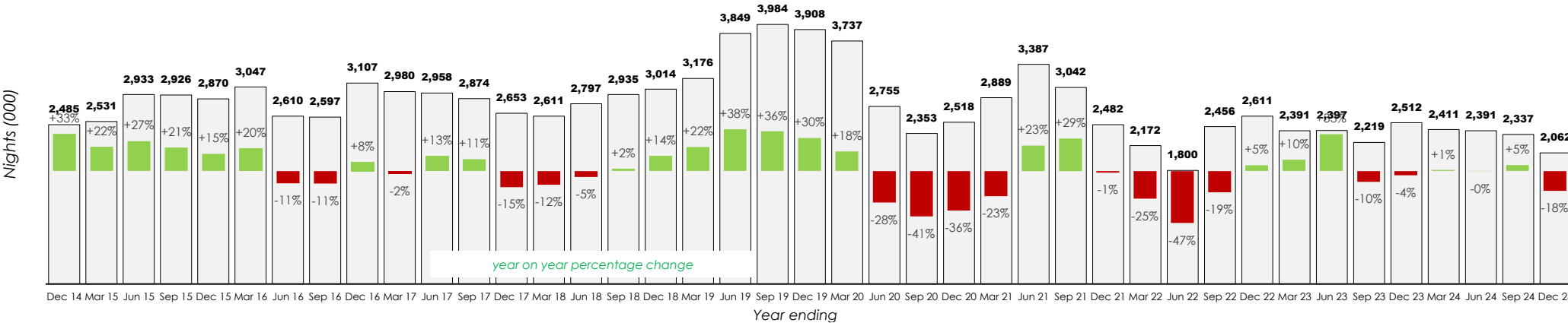
* Note - the percentage changes are subject to statistical significance testing.

Domestic Visitor Nights

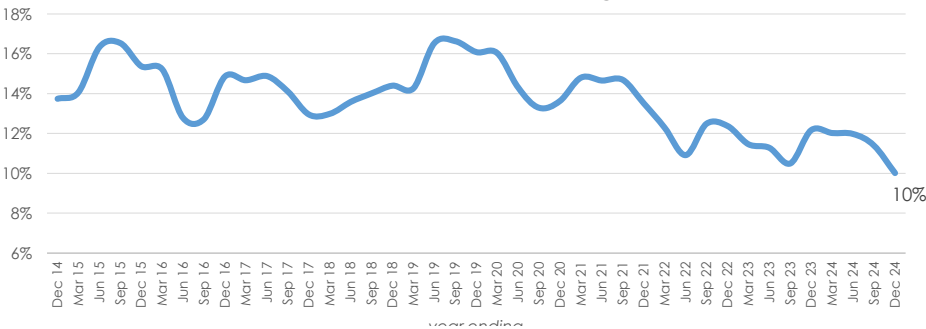
KEY POINTS FOR THE YEAR ENDING DECEMBER 2024

- 2.1 million visitor nights (rounded) - the lowest calendar year nights volume in the Monitor and second lowest for any rolling 12 month period.
- Likely cause is the shortest average length of stay recorded in the Monitor (2.5 nights).
- The latest estimate is 18% lower than 2023 but it is very important to note that this change is not statistically significant. Whilst this does not rule out a decrease the latest estimate does follow a downwards trend which adds weight to the likelihood that it was a decline.
- Byron's YOY % change is unfavourable compared to Tweed, Ballina and the overall North Coast Region.

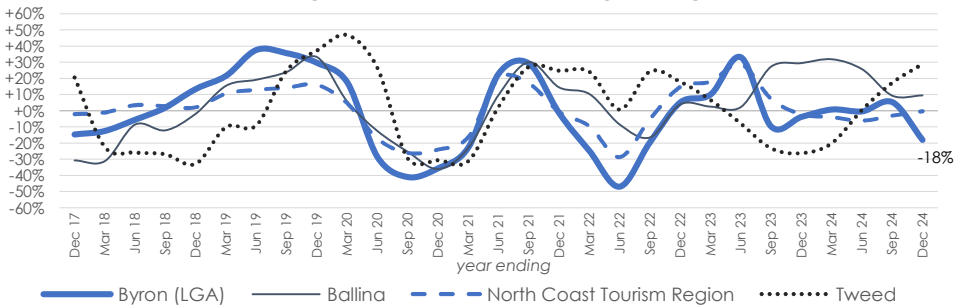
Byron Shire Domestic Visitor Nights (000) & YOY % change



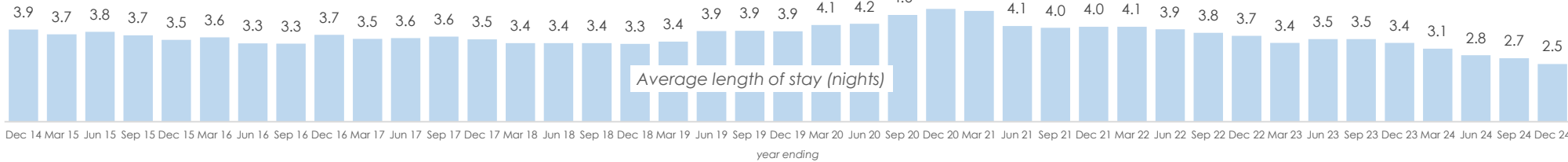
Market Share of North Coast Region



Domestic Visitor Nights: Year-on-year percentage change comparison*



* Note - the percentage changes are subject to statistical significance testing.



Source: Data-extracted from Tourism Research Australia's National and International Visitor Survey datasets under licence by Peter Valerio. All data, and the differences between data points, and percentage share calculations are subject to sample survey error.

Domestic Day Visitors

KEY POINTS FOR THE YEAR ENDING DECEMBER 2024

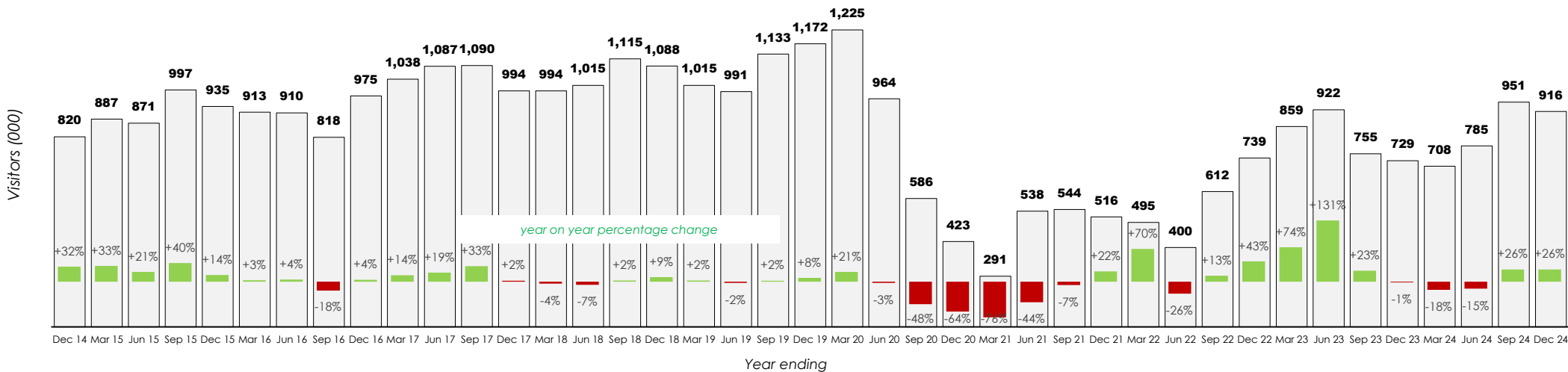
- 916,000 day visitors - the highest in a calendar year since 2019 but below the pre-Covid average.
- 26% up on 2023 (a statistically significant change when a slightly relaxed test is used).
- +26% is favourable compared to Ballina, Tweed & the overall North Coast Region.
- Share of the North Coast region of 13% was up 2 percentage points on 2023 and is only slightly below the pre-Covid average.
- At 22% below calendar 2019 domestic day visitation is clearly yet to recover for Byron

EXPENDITURE ESTIMATE

If it is assumed that spend per trip was the same as modelled by TRA for the years 2022-2023* (\$145 per visit) total expenditure in the latest 12 month period was:

\$133 million

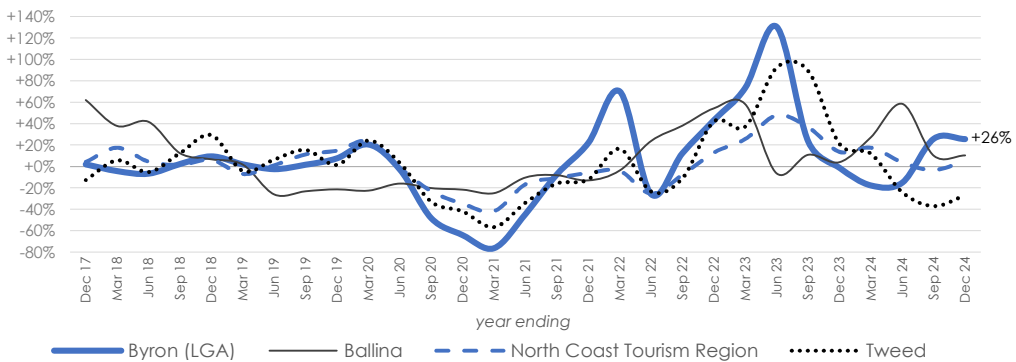
Byron Shire Domestic Day Visitors (000) & YOY % change



Market Share of North Coast Region



Domestic Day Visitors: Year-on-year percentage change comparison*



* Note - the percentage changes are subject to statistical significance testing.

International Overnight Visitors

KEY POINTS FOR THE YEAR ENDING DECEMBER 2024

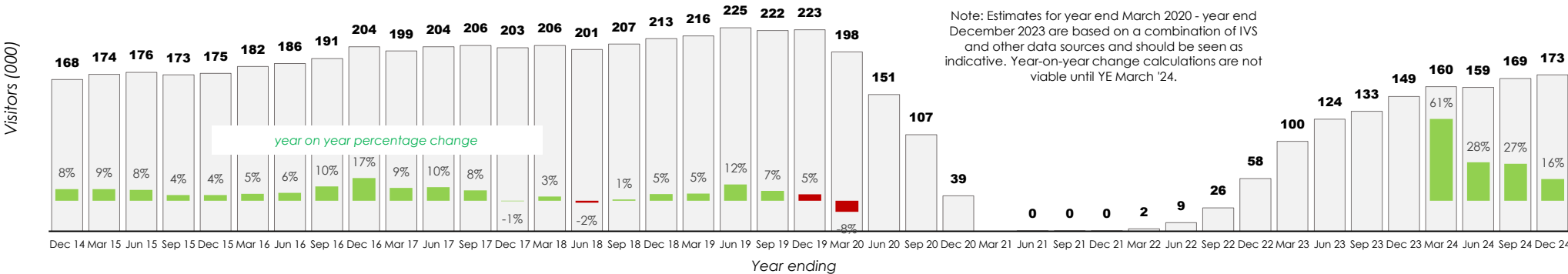
- 173,000 international visitors spent at least one night in Byron Shire LGA in calendar 2023.
- This is 16% up on 2023 - a statistically significant change using a standard test.
- The year-on-year percentage change of +16% is similar to the North Coast Region, favourable compared to Ballina but unfavourable compared to Tweed. Note that sample survey error may explain at least part of the differences.
- Byron Shire's share of the North Coast was 59% - similar to 2023 and identical to 2019.
- The estimate for 2024 is 22% lower than 2019 indicating that international overnight visitation to Byron Shire is yet to recover from the effects of the Covid pandemic.

EXPENDITURE ESTIMATE

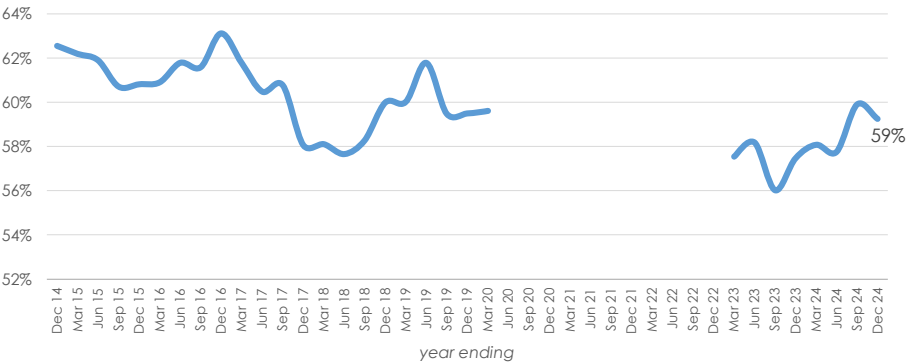
If it is assumed that spend per trip was the same as modelled by TRA for the years 2020-2021* (\$510 per visit) total expenditure in the latest 12 month period was:

\$88 million

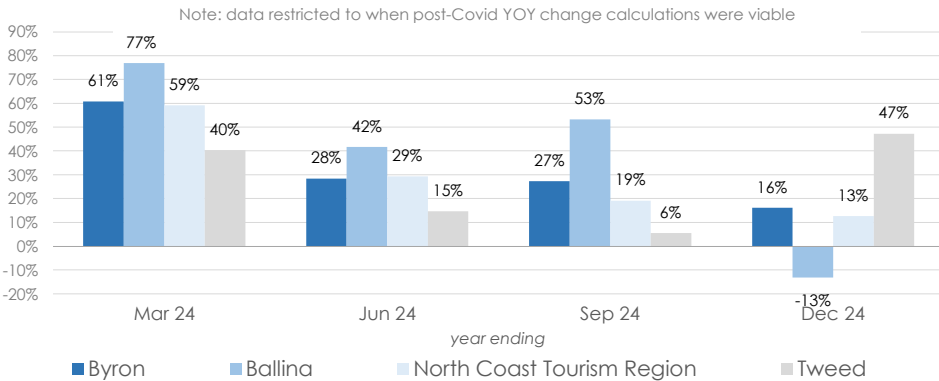
Byron Shire International Overnight Visitors (000) & YOY % change



Market Share of North Coast Region



International Overnight Visitors: YOY percentage change comparison*

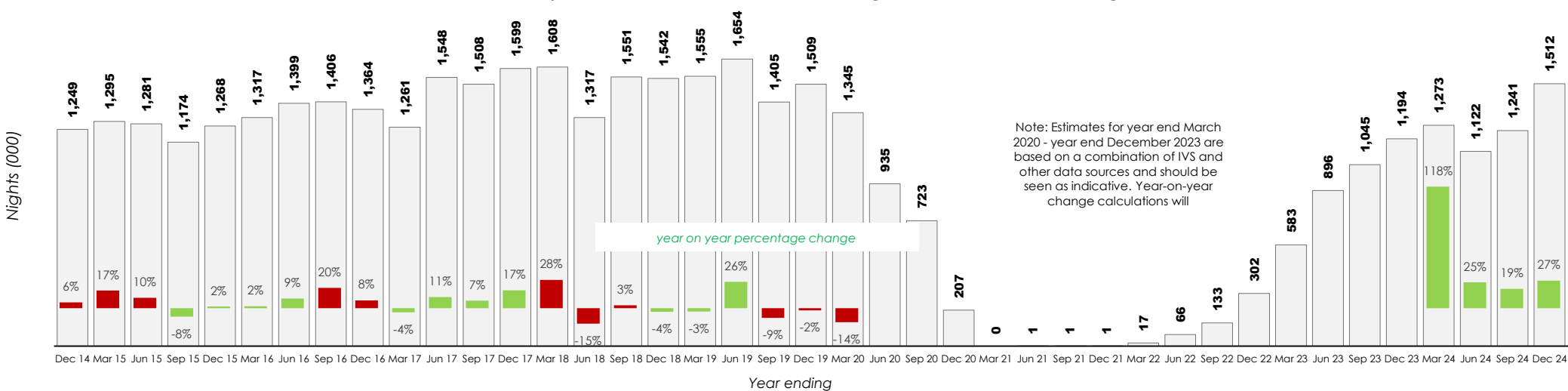


International Visitor Nights

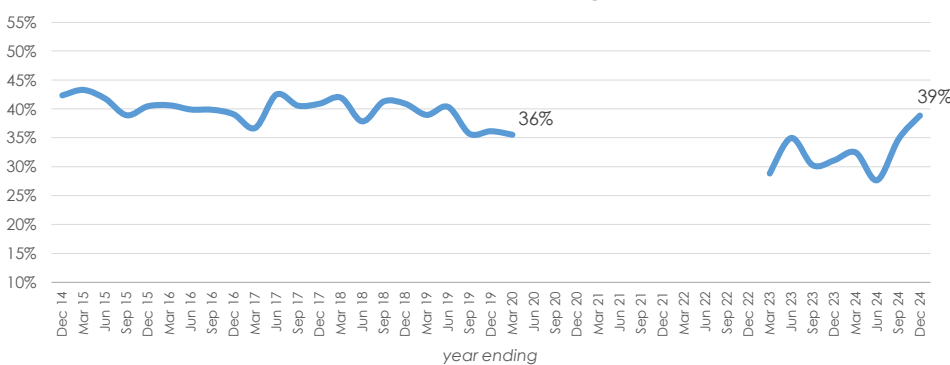
KEY POINTS FOR THE YEAR ENDING DECEMBER 2024

- 1.5 million nights in the latest year end period.
- This is 27% higher than 2023 (a statistically significant change when a relaxed test is used).
- +27% is favourable compared to the North Coast Region but unfavourable compared to Tweed & Ballina. Note that sample error may explain at least part of the differences.
- Average length of stay was 8.7 nights - slightly up on 2023 and around two nights longer than 2019.

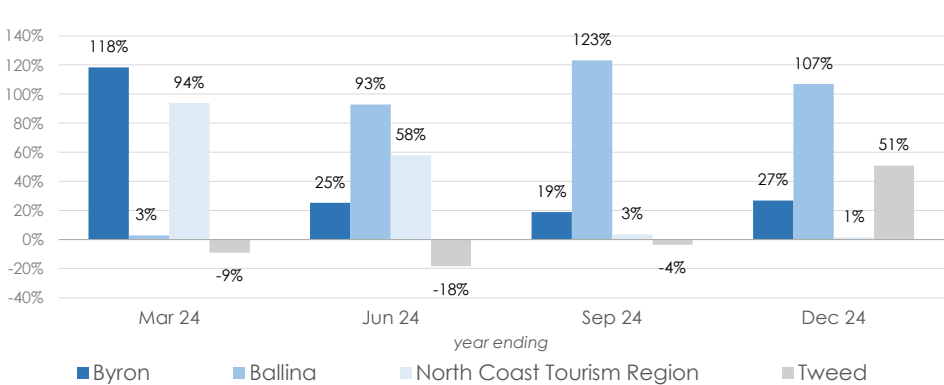
Byron Shire International Visitor Nights (000) & YOY % change



Market Share of North Coast Region



International Visitor Nights: YOY percentage change comparison*



* Note - the percentage changes are subject to statistical significance testing.