

BYRON SHIRE TOURISM MONITOR

Year ending March 2025

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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IMPORTANT NOTE RELATING TO DOMESTIC DATA

A major change to the survey methodology used for domestic data collection was implemented in January 2025. The new methodology (Domestic Tourism Statistics or DoTs for short) replaces the National Visitor Survey (NVS). The DoTs methodology involves the use of mobile phone location data and population data in conjunction with responses from a major face-to-face sample survey of domestic travellers. **One of the benefits of DoTs is that substantially more LGAs will receive quarterly estimates compared to the NVS.** However, the change to face-to-face interviewing and the inclusion of non-survey components in the DoTs methodology means that estimates derived from DoTs are not directly comparable with NVS estimates. This presents a temporary challenge for Local Councils that monitor and report tourism progress and performance using rolling 12 month time periods.

Whilst this will resolve in time, in the interim the options for Local Councils are to either abandon year-end monitoring and start from 'scratch' using DoTs quarterly data in isolation as it becomes available OR to retrospectively adjust NVS LGA estimates and use them in conjunction with the DoTs quarterly data. Retrospectively adjusting survey data (or 'backcasting') producing an historical estimate that is likely to have resulted if a new methodology had been used at that time. Tourism Research Australia has backcast quarterly data at the State level from the March quarter 2019 up to and including the December quarter 2024. Until such time that annual data flows from DoTs, it is reasonable to retrospectively adjust LGA estimates to the same degree NSW data was adjusted and thereby preserve an ability to retain year-ending monitoring IN ADDITION to reporting current quarterly estimates. This approach has been adopted for the domestic categories of the Shoalhaven Tourism Monitor (note that domestic day visitor estimates will become available later this year).

The following is a summary of the approaches adopted for the March, June and September 2025 tourism monitors:

Year ending March 2025 Monitor

- Adjusted domestic overnight visitors and visitor nights estimates for the June, September and December quarters of 2024 and the unadjusted DoTs estimate for the March 2025 quarter (reported in addition to year end)
- Unadjusted NVS data Domestic day visitor estimates for the June, September and December quarters of 2024 and the average percentage difference between December 2022 and 2023 to March 2023 and 2024 data applied to the to the December 2024 estimate to estimate the March 2025 quarter.

Year ending June 2025 Monitor

- Adjusted domestic overnight visitors and visitor nights estimates for the September and December quarters of 2024 and the unadjusted DoTs estimates for the March and June 2025 quarters from 2025 (reported in addition to year end).
- As above for domestic day visitors.

Year ending September 2025 Monitor

- Adjusted domestic overnight visitors and visitor nights estimate for the December quarters of 2024 and the unadjusted DoTs estimates for the March, June and September quarters from 2025 (reported in addition to year end).
- As above for domestic day visitors

Year ending December 2025 Monitor & beyond

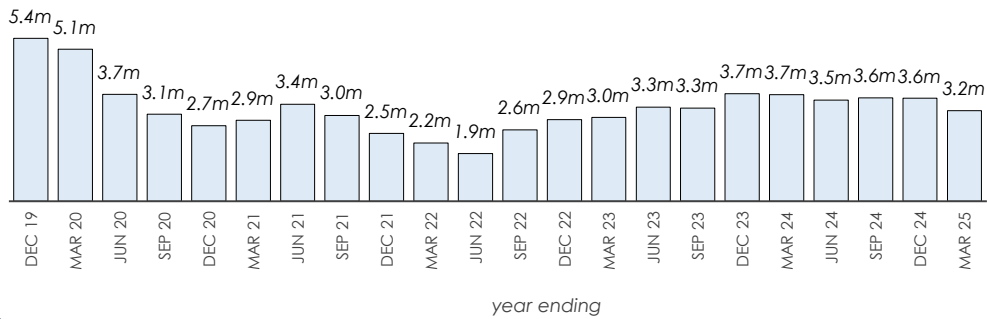
- Unadjusted DoTs estimates for the March, June, September and December quarters from 2025.
- As above for domestic day visitors.

OVERVIEW FOR THE YEAR ENDING MARCH 2025

TOTAL VISITORS (m)



TOTAL NIGHTS (m)



VISITOR SPEND ESTIMATE FOR THE YEAR ENDING MARCH

\$790

VISITOR CATEGORY KEY POINTS

DOMESTIC OVERNIGHT VISITORS

YE MARCH '25: 840,000 visitors; \$558m estimated spend
MARCH '25 QTR: 179,000 visitors; \$157m estimated spend

DOMESTIC VISITOR NIGHTS

YE MARCH '25: 2.1 million nights; ;Average length of stay 2.5 nights
MARCH '25 QTR: 593,000 nights; Average length of stay 3.3 nights

DOMESTIC DAY VISITORS

YE MARCH '25 PRELIMINARY: 977,000; Spend estimate \$142m
MARCH '25 QTR: Not available at this time.

INTERNATIONAL OVERNIGHT VISITORS

YE MARCH '25: 177,000; 10% up year-on-year; Spend estimate \$90m; North Coast market share 59%

INTERNATIONAL VISITOR NIGHTS

YE MARCH '25: 1.7 million; 35% up year-on-year; Avg. length of stay 9.7 nights; Nth Coast market share 39%

*Refer respective page in monitor for an assessment of the statistical significance of this percentage change

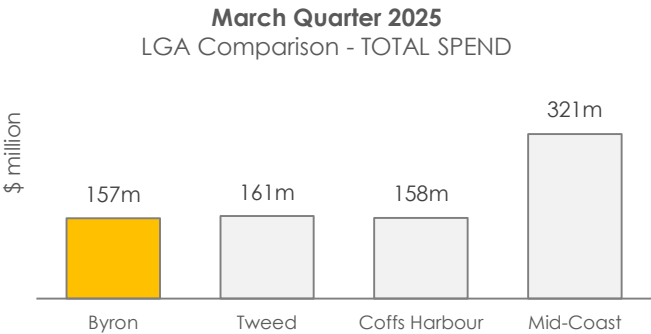
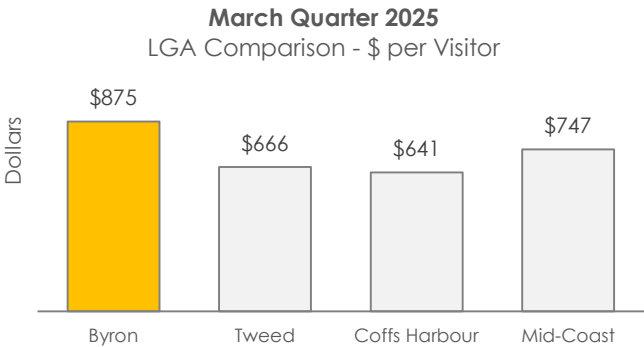
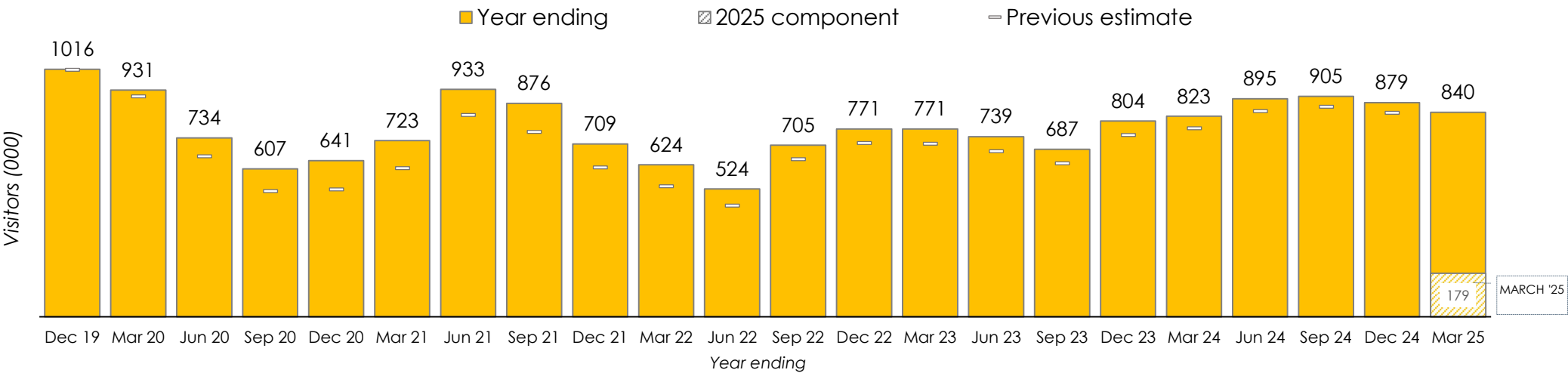
Source: Data-extracted from Tourism Research Australia's National and International Visitor Survey datasets under licence by Peter Valerio. All data, and the differences between data points, and percentage share calculations are subject to sample survey error.

Domestic Overnight Visitors

Refer explanatory notes on page 1

KEY POINTS FOR THE LATEST YEAR END PERIOD AND QUARTER:

- An estimated 840,000 domestic visitors spent at least one night in the Byron Shire in the year ending March 2025. This estimate comprises adjusted 2024 data from April-December and the March quarter 2025 estimate based on the new methodology.
- Although a year-on-year (YOY) percentage change has not been calculated given the above limitations, the latest year end period is broadly similar to the adjusted year end March 2024 period. The difference should not be interpreted as significant.
- The March quarter of this year-ending period is the first estimate based on the new methodology. In this quarter an estimated 179,000 domestic visitors spent at least one night in the Byron Shire. Given this is the first data of a new series there is no comparable data.
- This visitor volume for the quarter was below three of the four comparison LGAs (see chart bottom left). Total spend was on par with Tweed and Coffs Harbour and spend per visitor was well above (spend not available for Ballina or Clarence).



YEAR ENDING EXPENDITURE
ESTIMATE

If it is assumed that spend per night in the latest year ending period was the same as modelled by TRA for the March 2025 quarter (\$265) total expenditure was:

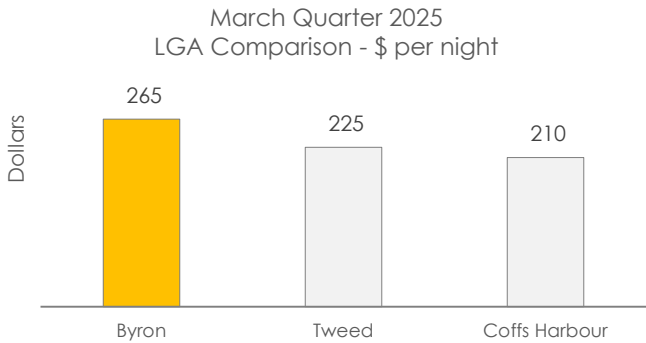
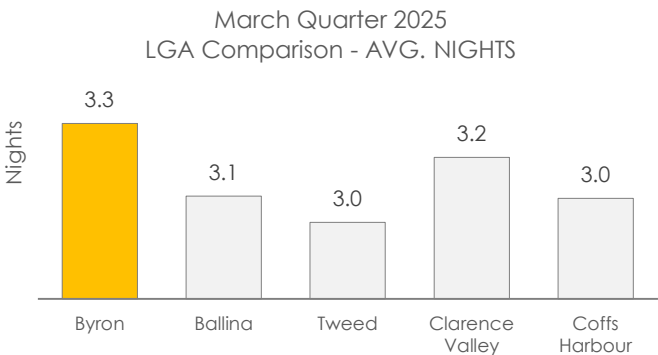
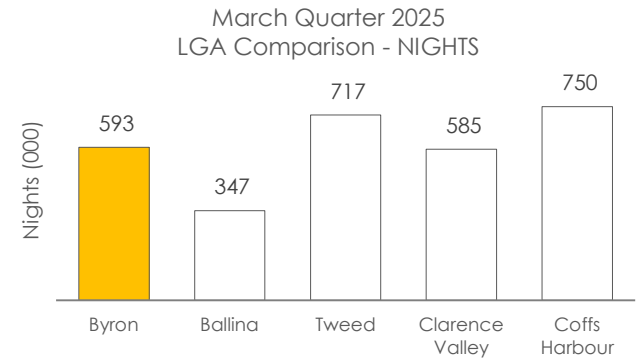
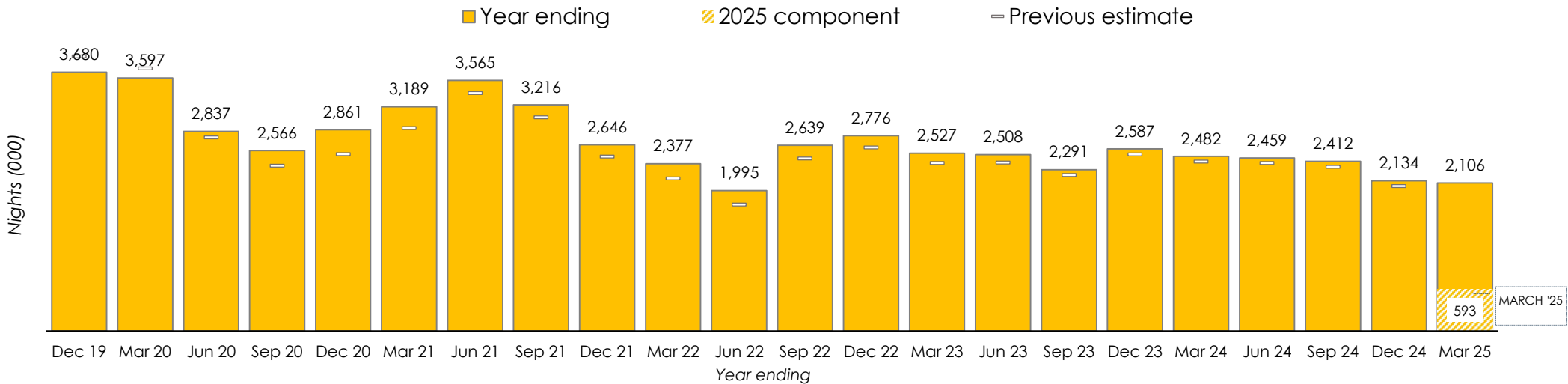
\$558 million

Domestic Visitor Nights

Refer explanatory notes on page 1

KEY POINTS FOR THE LATEST YEAR END PERIOD AND QUARTER:

- Domestic overnight visitors spent 2.1 million nights in the Byron Shire in the year ending March 2025. This estimate comprises adjusted 2024 data from April-December and the unadjusted March quarter 2025 estimate based on the new methodology.
- Noting that a year-on-year (YOY) percentage change has not been calculated given the limitations explained in the notes above, visitor nights volume in the latest year end period is lower than all adjusted year end March periods since YE March 2019. This should be seen as an indicative difference.
- The March quarter of this year-ending period is the first estimate based on the new methodology. In this quarter an domestic visitors spent and estimated 593,000 nights in the Byron Shire. Given this is the first data of a new series there is no comparable quarterly data.
- Visitor nights were below three of the four comparison LGAs in the latest quarter (see chart bottom left) but average length of stay and spend per night was the highest (spend per night not available for Ballina or Clarence Valley).



Domestic Day Visitors (preliminary)
Refer explanatory notes on page 1

KEY POINTS FOR THE LATEST YEAR END PERIOD AND QUARTER:

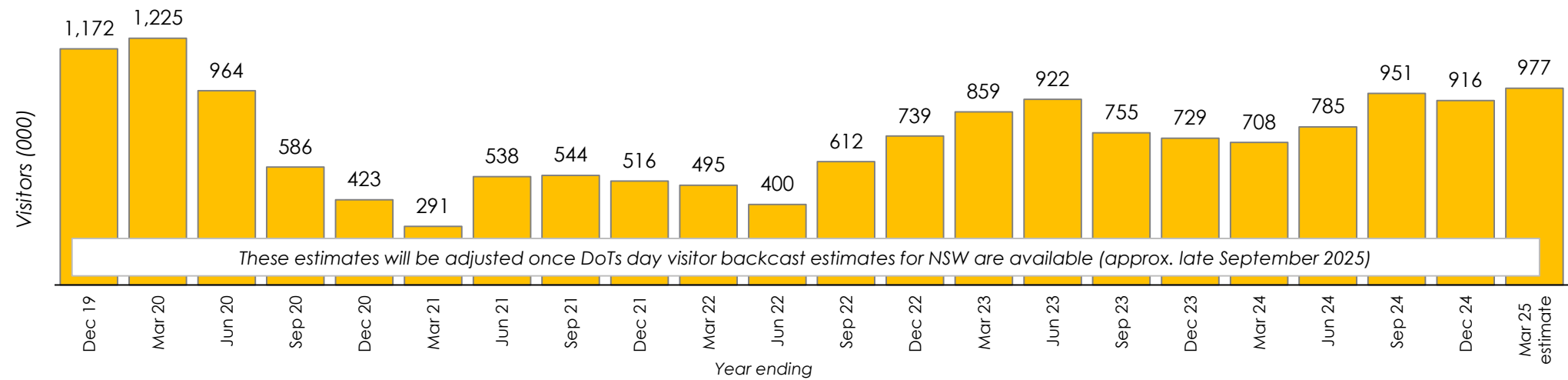
- Noting the estimation methodology on page 1, approximately 977,000 day visitors visited the Byron Shire in the YE March '25
- This will be amended when March and June 2025 quarter data becomes available.
- Percentage year-on-year change calculations are not viable in the transition to DoTs.
- The expenditure estimate for the period will also be amended to reflect updated visitor volume and (if available) more recent spend per visitor estimates.

PROVISIONAL
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:

\$142 million

*latest available (unpublished; commissioned by the author).



LGA COMPARISONS & 2025 QUARTER-SPECIFIC DATA TO FOLLOW NEXT MONITOR ASSUMING DATASET RELEASED BY TRA

International Overnight Visitors

KEY POINTS FOR THE LATEST YEAR END PERIOD:

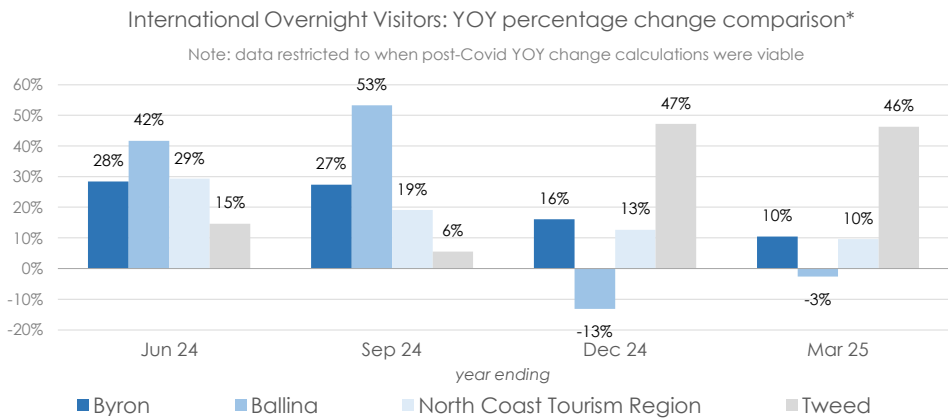
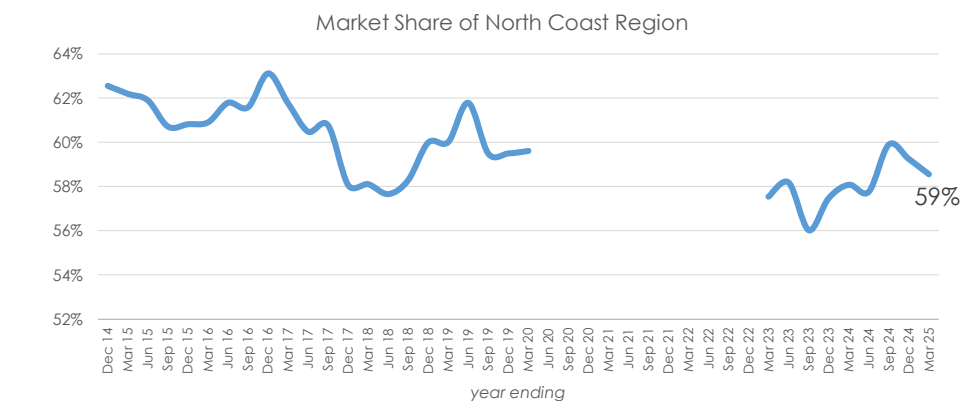
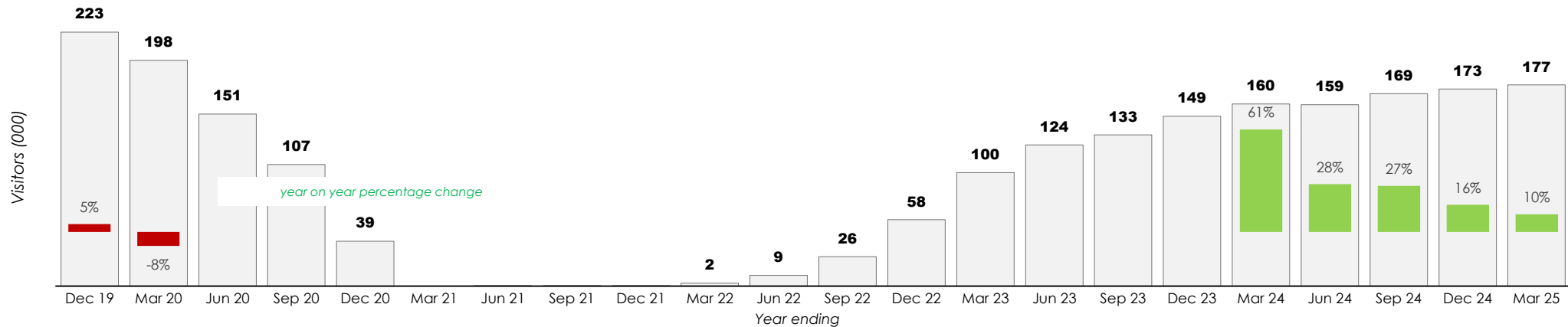
- 177,000 international visitors spent at least one night in Byron Shire LGA in the year ending March 2025
- This is 10% up on the YE March 2024 - a statistically significant change using a slightly relaxed test.
- The year-on-year percentage change of +10% is identical to the North Coast Region, favourable 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% - very similar to the YE March 2019.
- The latest visitor estimate is 21% lower than immediately prior to Covid indicating that international overnight visitation to Byron Shire is yet to recover from the effects of the 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:

\$90 million

*latest available (unpublished; commissioned by the author).



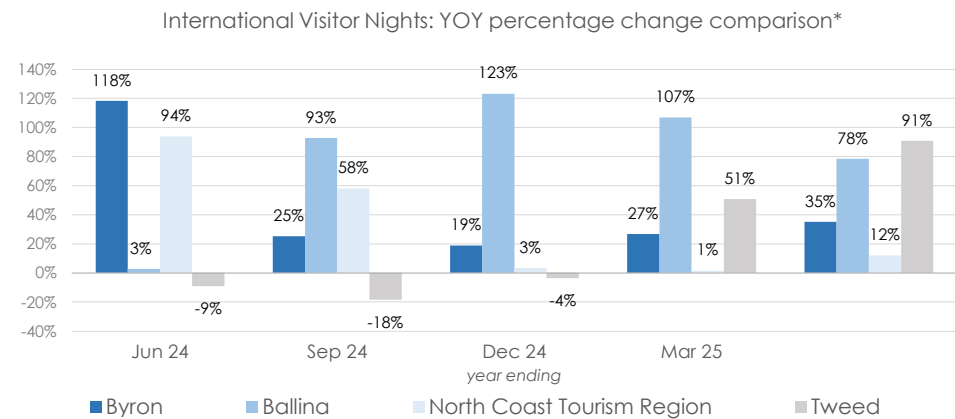
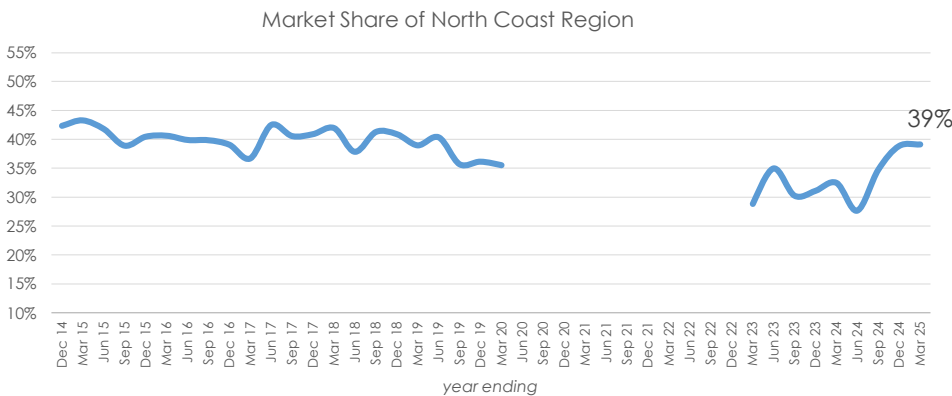
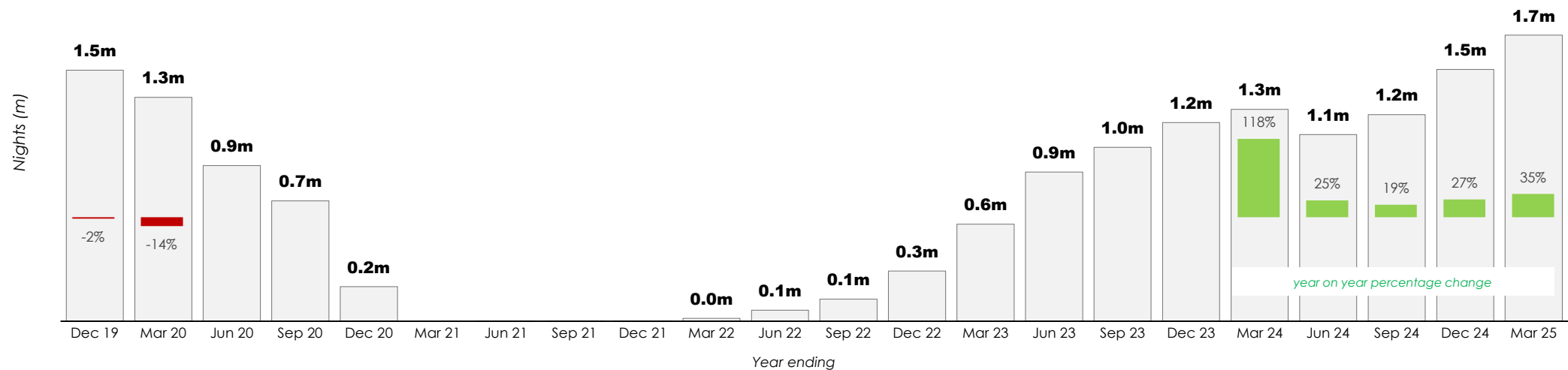
* Note - the percentage changes are subject to statistical significance testing.

Source: Data-extracted from Tourism Research Australia's (TRA) 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.

International Visitor Nights

KEY POINTS FOR THE LATEST YEAR END PERIOD:

- International visitors spent an estimated 1.7 million nights in the Byron Shire in the latest year end period.
- This is 35% higher than the year end March 2024 (a statistically significant change).
- +35% 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 9.7 nights - up 1.7 nights on the year end march 2024
- Market share of the North Coast was 39% - up 7 points on YE March 2024 and at on par or better compared with pre-Covid.



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