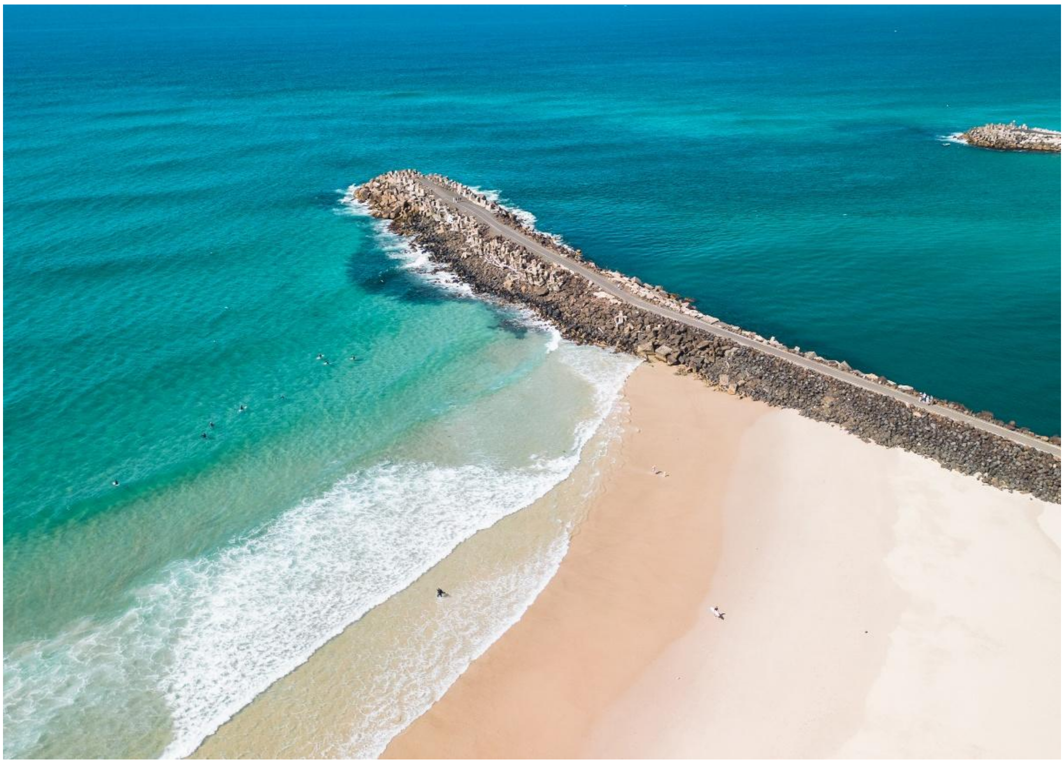
2024



BALLINA COAST AND HINTERLAND VISITATION REPORT

YEAR ENDING DECEMBER 2024

Contents

1. ABOUT THIS REPORT

This report presents the latest available data related to tourism in the Ballina Shire and considers this in the context of the 10-year period 2015-2014. Visitor volume and visitor profile data has been extracted directly from the datasets of Tourism Research Australia's (TRA's) National and International Visitor Surveys (NVS & IVS). Total visitor expenditure estimates use modelled spend per visitor estimates prepared by Tourism Research Australia using their Regional Expenditure Allocation Methodology (REX) based on the years 2022 and 2023. These estimates have been increased by the consumer price index for 2024.

Whilst the NVS/IVS are considered amongst the best sources of visitor data in the world and are recognised as Australia's 'official' tourism data sources they are nonetheless subject to limitations. This includes but is not limited to those related to respondent recall and sample survey error. Expenditure estimates have an additional limitation. Spend data in the NVS/IVS is collected at the overall trip level as opposed to individual destinations visited on the trip. The REX model attempts to isolate spend in specific destinations by estimating spend occurring elsewhere (such as before the trip or travelling to and from the destination). Whilst all data used in this report has considered underlying sample sizes and observed recommended minimums these limitations cannot be avoided and those reading this report should apply relevant caution in the interpretation of all figures.

This report will be the last annual report that uses domestic tourism data sourced from the NVS. As of January 2025, a new methodology was implemented to collect this data. Whilst the changes have been made to improve accuracy and timeliness as at the time of writing it is not clear when Local Government Area data to support reliable visitation and profile estimates will be available. This is to be expected with a significant change in methodology and was the case when the NVS was introduced 28 years ago. The methodology for the collection of international visitor data remains unchanged.

Those requiring additional information regarding the NVS, IVS, REX or the new methodology for the collection of domestic data should visit Tourism Research Australia's website at www.tra.gov.au.

2. 2024 AT A GLANCE

The year 2024 qualifies as an extremely successful year for tourism in the Ballina Shire. Total visitors and visitor nights both exceeded pre-Covid levels and total visitation represented a new record. Whilst longer term expenditure data for Ballina Shire is not available, given visitor and visitor nights volumes it is highly likely that the total spend estimate for 2024 also represented a new record.

Total Visitors	Total Visitor Nights	Total Spend Estimate
1.03m	1.52m	$583m
5.5% up on 2023	15.0% up on 2023	3.4% up on 2023
9.4% up on 2019	8.4% up on 2019	*Not available*
10 year rank: 1st	10 year rank: 2nd	*Not available*

Figure 1 - Ballina Shire Visitors, Visitor Nights & Expenditure estimates for 2024

SOURCE: Visitor and Visitor Nights: National Visitor Survey, International Visitor Survey; Tourism Research Australia (TRA). Visitor spend: TRA Regional Expenditure Allocation Model (REX) for 2022 and 2023 increased by CPI for 2024. Copywrite remains with TRA. Caution: All figures & calculations are estimates and are subject to survey sample error and other limitations.

3. TEN YEAR TRAJECTORY

3.1 Total Visitors and Visitor Nights

Figure 2 shows Ballina LGA's total visitation over a 10-year period. Despite the impact of Covid related travel restrictions total visitation grew at an average annual growth rate of 7.5% over this period. Growth since 2021 has been significant and consistent with total visitors increasing at a compounding average annual rate of 18% to reach a new calendar year record of 1.03 million visitors (2024). In addition to being a new record this confirms tourism in Ballina – unlike a number of other LGAs in Regional Australia - has more-than recovered from the impact of Covid travel restrictions.

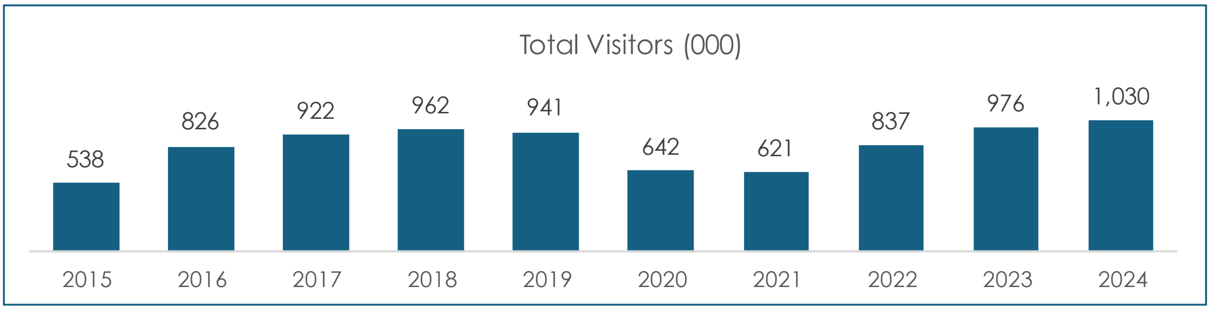


Figure 2 - Ballina LGA Total Visitors 2015-2024

SOURCE: National Visitor Survey, International Visitor Survey; Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: All figures & calculations are estimates and are subject to survey sample error.

Total visitor nights (Figure 3) follow a similar trajectory to that of total visitors over the period 2021-2024 with an average annual rate the same as total visitors (18% compounding) to reach the second highest calendar year visitor nights volume on record and surpassing the pre-Covid 2019 benchmark. Prior to Covid there was no clear trend with an equal mix of positive and negative year-on-year changes.

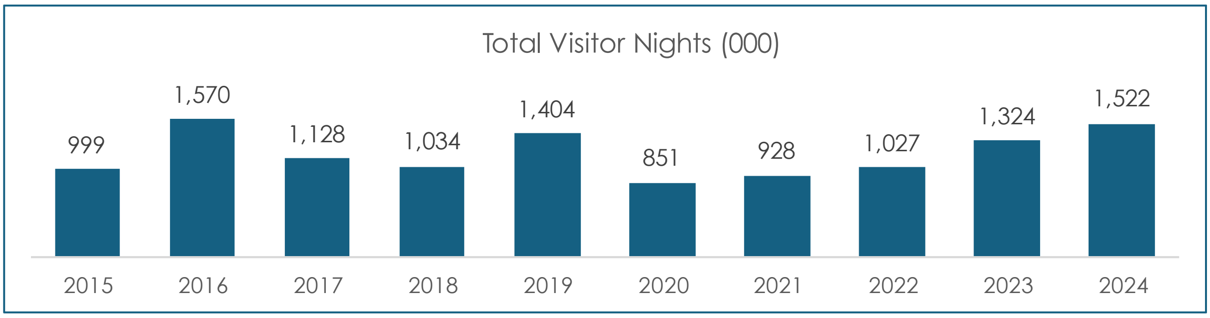


Figure 3 - Ballina LGA Total Visitor Nights 2015-2024

SOURCE: National Visitor Survey, International Visitor Survey; Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: All figures & calculations are estimates and are subject to survey sample error.

3.2 Visitor Category Breakdown

As shown in Figure 4 domestic day visitors have been the largest category of visitors in all years apart from 2016 accounting for an average of 56% of total visitors. Domestic overnight visitors have accounted for an average of 42% with international overnight representing the remaining 2%. From a visitor nights perspective (see

) domestic overnight visitors dominate the profile accounting for an average of 92% of nights over the past 10 years. The impact of Covid travel restrictions on international visitor nights is very clear over the years 2020-2023 despite the fact that restrictions were completely lifted mid 2022.

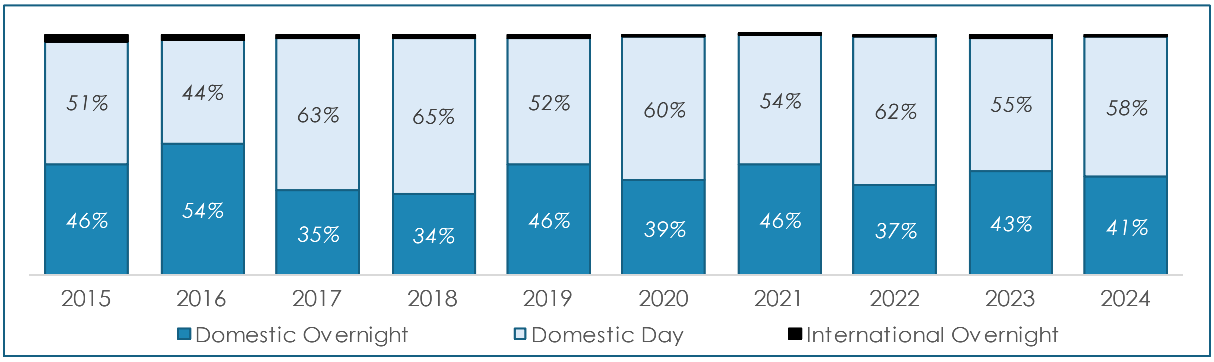


Figure 4 – Percentage of Visitors x Category

SOURCE: National Visitor Survey, International Visitor Survey; Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: All figures & calculations are estimates and are subject to survey sample error. Additional caution; the annual sample size associated with day visitors is modest.

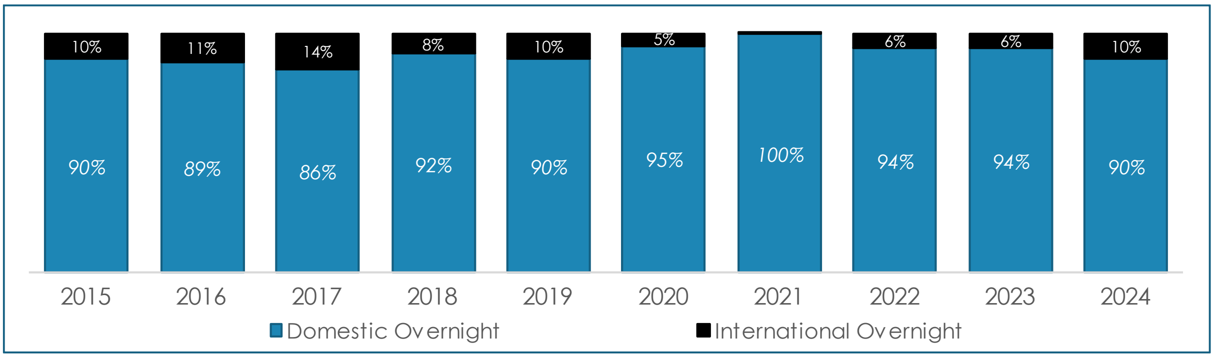


Figure 5 - Percentage of Visitor Nights x Category

SOURCE: National Visitor Survey, International Visitor Survey; Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: All figures & calculations are estimates and are subject to survey sample error.

3.3 Length of Stay

Average length of stay of domestic overnight visitors (Figure 6a) has varied little over time. Variance over the past 10 years is only 0.2 of one night (i.e. one fifth of one night). Excluding 2015 (assuming this may be due to an atypical visitor profile or higher sample error than normal) the variance was only 0.13 of one night. The longer average length of stay in the years 2020 and 2021 is typical of the broader market. Average length of stay for international overnight visitors (Figure 6b) varies considerably over time and does not follow any obvious pattern. This is not unusual and reflects changes in visitor profiles and behaviour associated with international visitation. That said, the average length of stay of 14.3 nights was the highest recorded over the past 10 years.

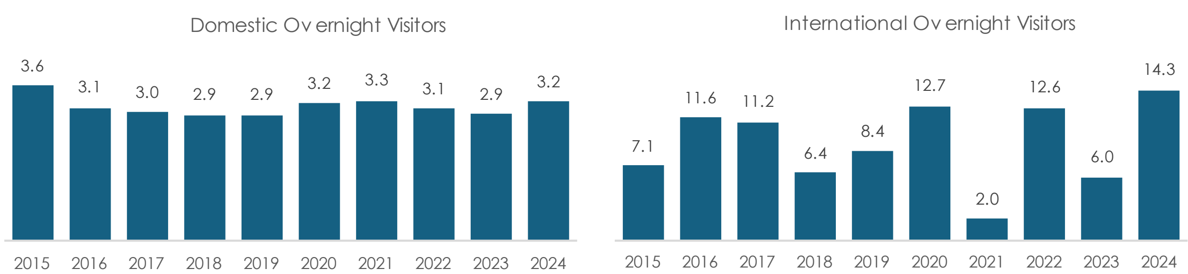


Figure 6a & b - Average nights per visit - domestic overnight and international overnight visitors

SOURCE: National Visitor Survey, International Visitor Survey; Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: All figures & calculations are estimates and are subject to survey sample error.

4. Domestic Overnight Visitors

4.1 Overnight Visitation

The 2024 estimate of 423,000 domestic overnight visitors (Figure 7) is very similar to 2023 and 2019 (the small difference is not statistically significant) and is therefore broadly equal to the second highest calendar year visitor volume recorded over the past 10 years. There is no trend evident over the 10 year period but the impact of Covid travel restrictions all but eliminated the prospect of a consistent trend forming. The years 2023 and 2024 are, however, the only two consecutive years above 400,000 visitors.

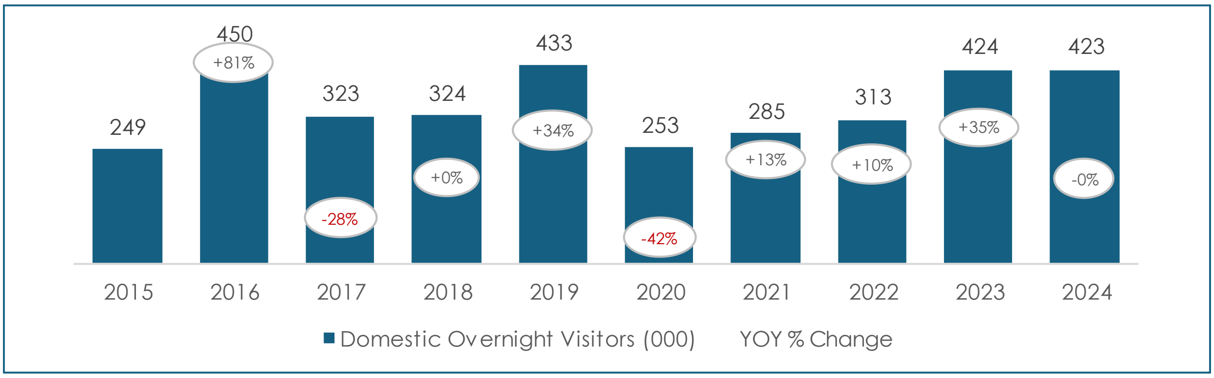


Figure 7 - Domestic Overnight Visitors (000) & Year-on-year Percentage Change

SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: All figures & percentage changes are subject to and affected by sample error.

Table 1 shows five overview indicators for Ballina LGA and the North Coast Tourism Region as a whole. Noting that these changes are subject to statistical significance testing, Ballina LGA's results are favourable or similar in four out of five measures.

	BALLINA LGA	NORTH COAST REGION	DIFFERENCE
CAGR[(a)] 2015-2024	6.1%	2.8%	+3%
CAGR 2015-2019	14.8%	7.0%	+8%
CAGR 2021-24	14.1%	13.0%	+1%
2024 v 2023	-0.2%	10.8%	-11%
2024 v 2019	-2.3%	-2.5%	+0%

Table 1 Domestic Overnight Visitors; Overview indicators; Ballina LGA and North Coast Tourism Region.

SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Percentage changes and differences may not be statistically significant.

(a)CAGR=Compounding annual growth rate

4.2 Domestic Visitor Nights

On paper[1], the 2024 domestic visitor nights estimate of 1.37 million nights (rounded) is the second highest in the past 10 years. However, the difference between the 2016 'high point' of 1.39 million is not statistically significant which means that it is reasonable to describe the 2024 estimate as 'on pa' with the previous calendar year record.

[1] 'On paper' = does not consider statistical significance

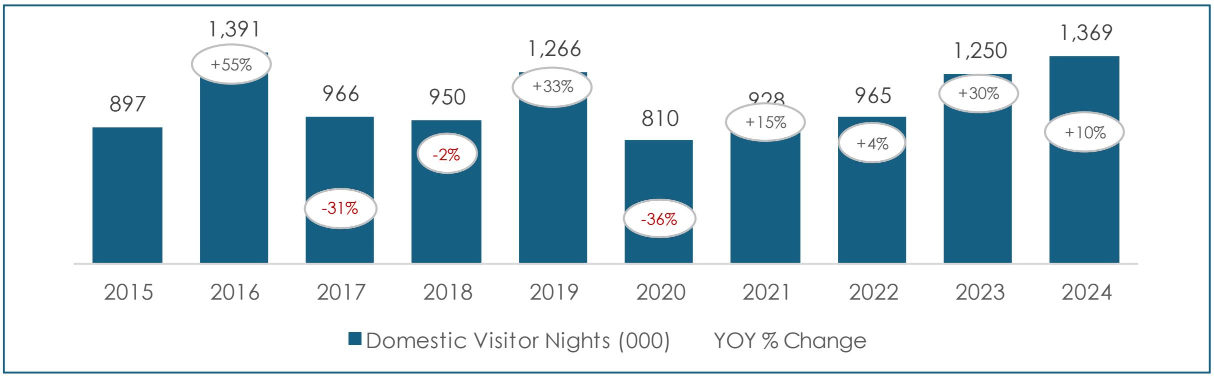


Figure 8 - Domestic Visitor Nights (000) & Year-on-year Percentage Change

SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: All figures & percentage changes are subject to and affected by sample error.

The overview indicators in Table 2 present a similar picture to the visitor indicators with Ballina LGA recording favourable results in four out of the five measures. As with the visitor indicators these changes are subject to statistical significance testing and the differences may not be statistically significant. That said, a 'weight of evidence' approach suggests Ballina has performed comparably well.

	BALLINA LGA	NORTH COAST REGION	DIFFERENCE
CAGR(a) 2015-2024	+5%	+3%	+2%
CAGR 2015-2019	+9%	+7%	+2%
CAGR 2021-24	+14%	+13%	+1%
2024 v 2023	+10%	+11%	-1%
2024 v 2019	+8%	-3%	+11%

Table 2 – Domestic Visitor Nights; Overview indicators; Ballina LGA and North Coast Tourism Region.

SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Percentage changes and differences may not be statistically significant.

(a)CAGR=Compounding annual growth rate

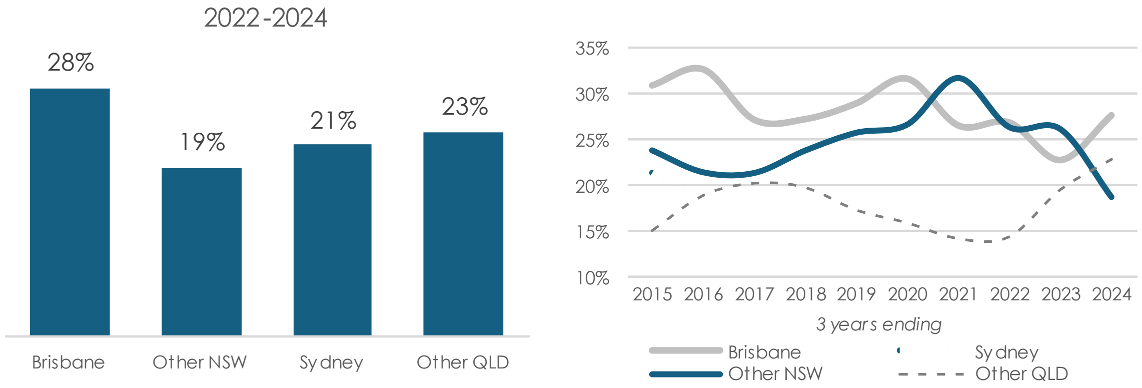
4.3 Domestic Overnight Visitor Profile

Note: The annual sample size is not considered large enough to support visitor profiling. A three year rolling annual average has therefore been used. Please also note that only the main categories for each profile variable are displayed.

Main Origin Markets

Refer Figures 9a and b next page.

- *Four markets consistently account for around 90% of visitors with Brisbane consistently the most significant in non-Covid times.*
- *Brisbane and particularly 'Other NSW' have declined in significance.*
- *Other QLD visitors have increased in significance.*



Figures 9a & b - Main Origin markets; Percentage of Visitors (2022-24 & rolling three-year average)
SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Subject to sample error.

Main Reason for Visit

- *Holiday has been the most significant until the latest period when it and VFR accounted for an equal amount of visitors.*
- *Business has steadily increased over the last three periods to reach a new high point of 23%*

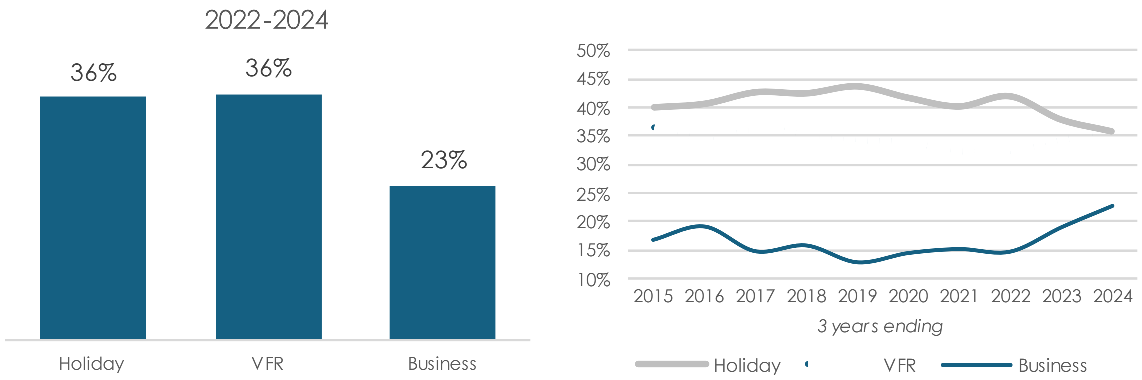


Figure 10a & b - Main Reason for Visit; Percentage of Visitors (2022-24 & rolling three-year average)
SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Subject to sample error.

Seasonality – quarter in the year visited

Refer Figure 11a & b next page.

- *Not that much change over time.*
- *The end of the time series in Figure 10(b) looks very much like the beginning with the exception of the March quarter which now accounts for a much reduced 19% of visitors.*
- *The reduced March quarter percentage is not so much due to decreased visitors volume in that quarter but increased volume in the other quarters.*
- *This may well reflect the impact of recent severe weather events in the March quarter.*

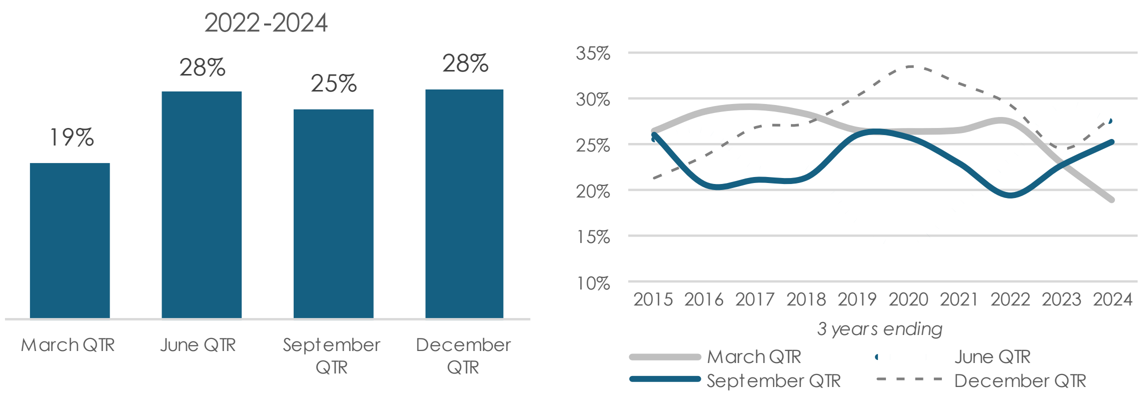


Figure 11a & b – Quarter in year visited; Percentage of Visitors (2022-24 & rolling three-year average)

SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Subject to sample error.

Length of Stay (nights per visit)

- *The order of significance of the length of stay categories shown in Figure 11(b) has not changed over time.*
- *One and two night stays clearly dominate the length-of-stay profile with decline in the one night category evident in more recent periods.*
- *Overall, 1-3 night stays account for around three-quarters of visits with a maximum long term variation of +/-2%.*
- *From a pre and post-Covid perspective three night stays has increased in significance by 5% (i.e. 11% vs 16%).*

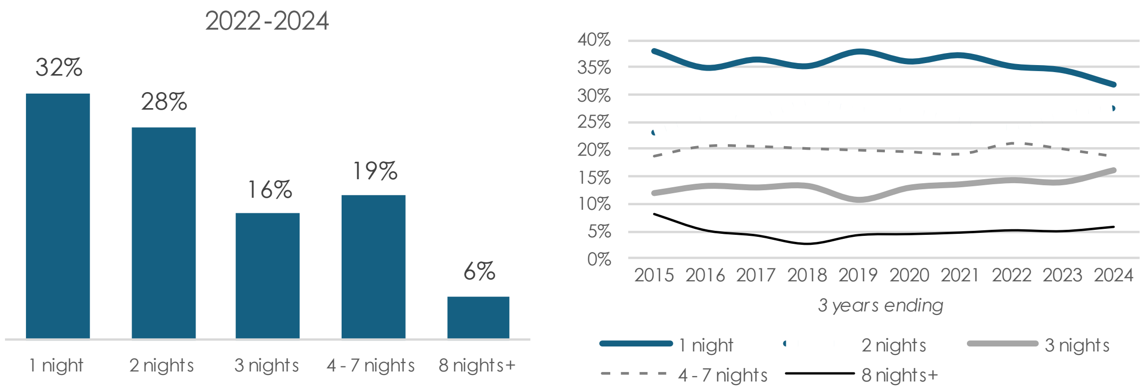


Figure 12a & 11b – Average nights per visit; Percentage of Visitors (2022-24 & rolling three-year average)

SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Subject to sample error.

Travel Party Type

Refer Figure 13a & b next page.

- *Over 2022-2024 'Travelling Alone' and 'Adult Couple' travel parties accounted for almost two-thirds of visitors.*
- *There have been a number of notable changes since Covid.*

- *The significance of 'Travelling Alone' has gradually increased' whilst the significance of 'Adult Couples' and 'Family Group – parents and children' have gradually decreased.*

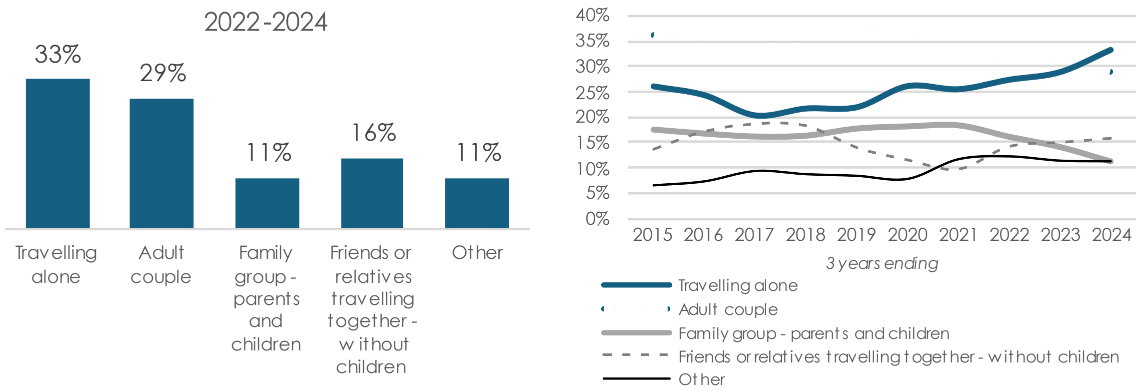


Figure 13a & b – Travel Party Type; Percentage of Visitors (2022-24 & rolling three-year average)

SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Subject to sample error.

Accommodation Type

- *'Friends or relatives property' is consistently the most significant accommodation type accounting for an average 41% of visitor nights over the long term (42% in the most recent period).*
- *'Hotel/resort/motel or motor inn' has increased in significance post Covid whilst 'Caravan park or commercial camp ground' has decreased by a similar amount. This may be the result of severe post-Covid weather events discouraging camping.*

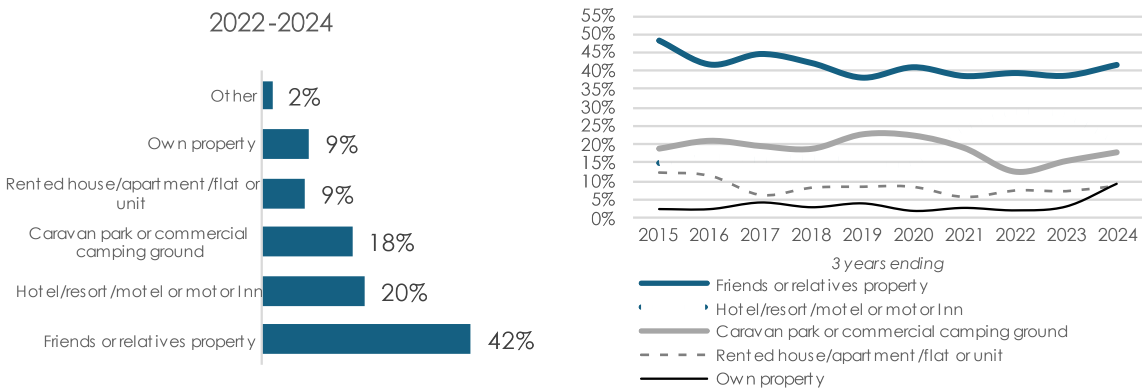


Figure 14a & b – Accommodation Type; Percentage of Visitor Nights (2022-24 & rolling three-year average)

SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Subject to sample error.

Top 10 Activities (as of 2024)

See Table 3 and Figure 15 next page.

- *Eating out/dining at a restaurant and/or café is the most significant activity in the short, medium and long term with 63% of visitors engaging in this activity in the most recent period 63%*
- *This is well above the second and third placed activities of Going to the Beach (43%) and Visiting Friends/Relatives (40%).*

- *All activities in the top 10 have grown in significance the long term (i.e. 2024 v 2015) with the exception of Visiting Friends/Relatives, Going Shopping for Pleasure and Going to Markets.*
- *The standout long term growth activities are Pubs/Clubs etc, Visiting National/State Parks and Bushwalking/Rainforest Walks.*
- *Four activities have decreased in significance compared to pre-Covid (i.e. 3 years ending 2019): Go to the Beach, Go to Markets, Sightseeing/looking around and Visiting Friends/Relatives.*
- *The standout increases in significance compared to pre-Covid are Exercise, Gym or Swimming and Visiting National/State Parks.*

ACTIVITY	2015	2019	2024	2015 Rank	2019 Rank	2024 Rank	2024 VS 2015	2024 VS 2019
Eat out / dine at a restaurant and/or cafe	56%	61%	63%	1	1	1	+6%	+2%
Go to the beach	42%	47%	43%	3	2	2	+1%	-4%
Visit friends & relatives	46%	42%	40%	2	3	3	-6%	-1%
Pubs, clubs etc	18%	24%	28%	6	5	4	+10%	+4%
Sightseeing/looking around	19%	28%	26%	5	4	5	+7%	-2%
Go shopping for pleasure	21%	15%	20%	4	6	6	-1%	+5%
Bushwalking / rainforest walks	8%	9%	14%	12	8	7	+6%	+5%
Exercise, gym or swimming	9%	6%	14%	11	9	8	+5%	+8%
Visit national parks / state parks	5%	5%	13%	15	12	9	+8%	+7%
Go to markets	10%	9%	7%	7	7	10	-3%	-3%

Table 3 - Percentage Undertaking Activity – Top 10 as at 2022-24 & Metrics

SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Subject to sample error.

Activities 11-20 in terms of engagement in the period 2022-24 are shown in Figure 15.

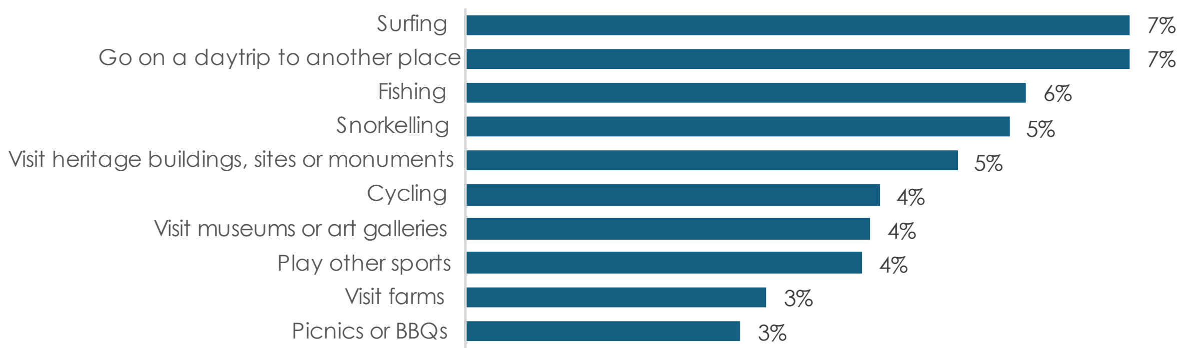
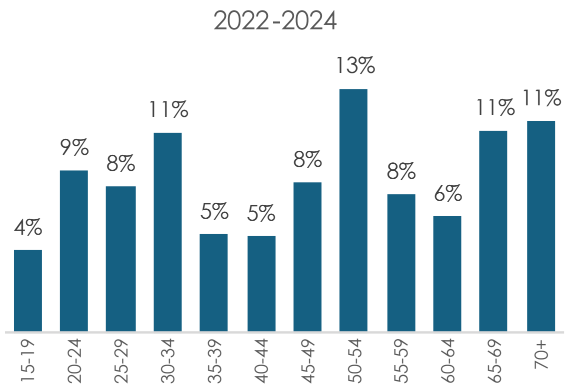


Figure 15 –Activities – 11-20 as at 2022-24

SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Subject to sample error.

Age Group

- *As at 2022-2024 almost 60% of visitors are aged 45 or more and 40% are below 45 years.*
- *This percentage has increased over time.*
- *Visitors aged 30-44 years have clearly decreased in significance since Covid (around 6%) whilst visitors aged 15-29 have increased by around 4%.*



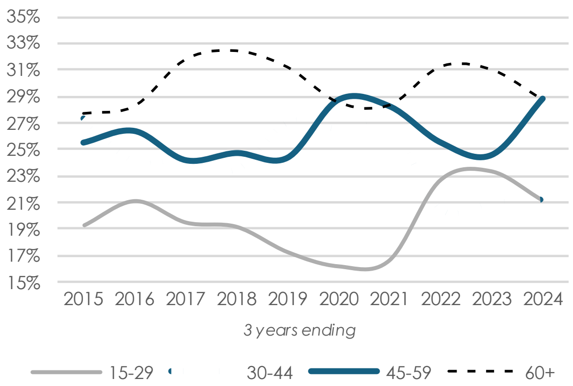


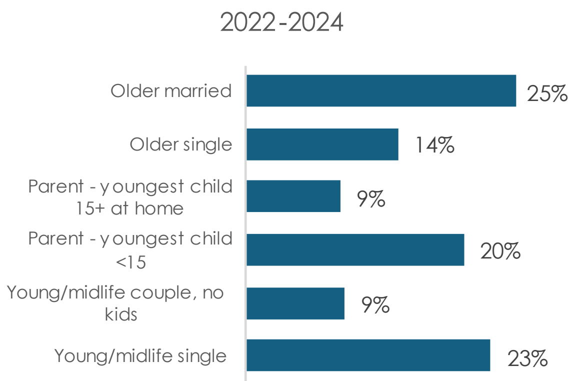
Figure 16a & b – Age Group; Percentage of Visitors (2022-24 & rolling three-year average)

SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Subject to sample error.

Lifecycle Segment

Note: Consistent data only available from three years ending 2018 onwards

- *Not much change prior to Covid*
- *Older married still the main lifecycle segment but since Covid a marked increase in Young/midlife singles primarily due to midlife singles.*
- *Corresponding post-Covid decline in*



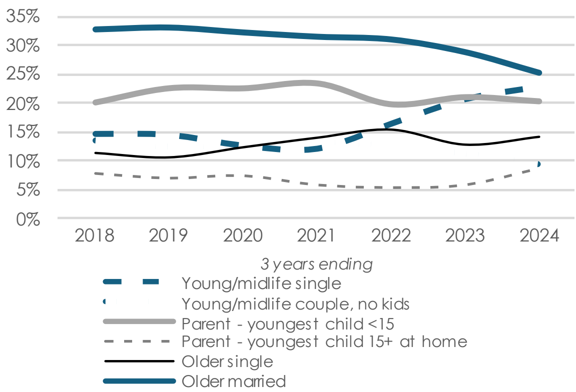


Figure 17a & b – Lifecycle Segment; Percentage of Visitors (2022-24 & rolling three-year average)

SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Subject to sample error.

Employment Status

- *'Working' full time clearly dominates the employment status profile in the short, medium and long term.*
- *Not much change prior to Covid*
- *Since Covid there has been an increase in 'Working full time' and smaller decreases in other categories.*

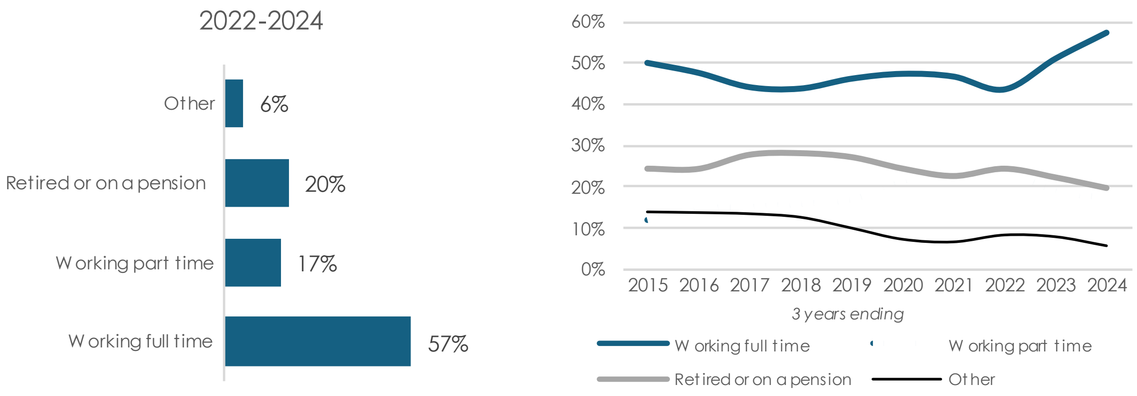


Figure 18 – Employment Status; Percentage of Domestic Overnight Visitors (2022-24 & rolling three-year average)
SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Subject to sample error

5. Domestic Day Visitors

5.1 Domestic Day Visitation

Note: Sample size in 2024 is below average. Please treat with additional caution.

Domestic day visitors are often seen as low priority visitors compared to domestic overnight visitors. However, for destinations that are close enough to for a day visit but far enough away for a short break (as is the case with Ballina for key markets such as SE Qld) day visitors may also visit on overnight trips. For those who have not visited Ballina before, day visitation may also be seen as a low risk 'destination sampling' and an opportunity to gain new overnight visitors.

The 2024 estimate of 598,000 domestic day visitors for Ballina LGA is broadly similar to 2017 and 2018 (sample error may account for the difference) and is therefore 'on par' with the highest calendar year visitor volume recorded over the past 10 years (see Figure 19). As with domestic overnight visitors there is no evidence of a trend over the 10 year period and the impact of Covid travel restrictions clearly all but eliminated the prospect of a consistent trend forming. T

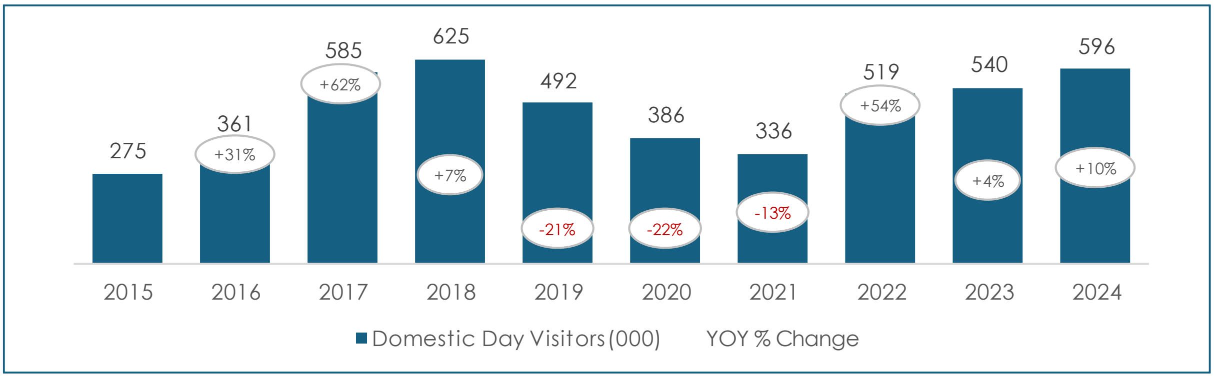


Figure 19 - Domestic Day Visitors 2015-2017

SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Subject to sample error. Sample error in 2024 is above average. Please treat with additional caution.

Table 4 shows a range of overview indicators for Ballina LGA and the North Coast Tourism Region as a whole. Noting that these changes are subject to statistical significance testing, Ballina LGA's results are favourable in all cases.

	BALLINA LGA	NORTH COAST REGION	DIFFERENCE[2]
CAGR(a) 2015-2024	9.0%	1.3%	+8%
CAGR 2015-2019	15.7%	7.8%	+8%
CAGR 2021-24	21.1%	10.6%	+10%
2024 v 2023	10.4%	5.2%	+5%
2024 v 2019	21.1%	-17.0%	+38%

Table 4 - Domestic Day Visitors; Overview indicators; Ballina LGA and North Coast Tourism Region.

SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Percentage changes and differences may not be statistically significant.

(a)CAGR=Compounding annual growth rate

5.2 Domestic Day Visitor Profile

The relatively small sample size requires a five year period to produce reasonable visitor profile estimates.

Main Origin Markets

Refer Figure 20a & b next page.

- *Dominated by the North Coast Region accounting for 73% of visitors in the most recent period.*
- *The significance of this market has increased post Covid (+6%) whilst the combined Brisbane and Gold Coast have decreased by the same amount.*

[2] Caution: The differences are subject to statistical significance testing.

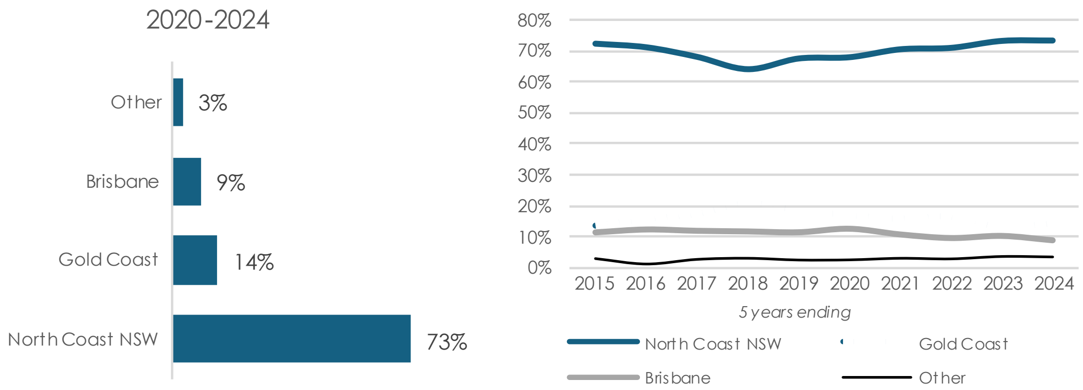


Figure 20a & b – Main origin markets; Percentage of domestic day visitors (2020-24 and rolling 5 year average).
SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Subject to sample error

Main Reason for Visit

- *'Holiday' has always been the main reason for a day visit accounting for around half of all visitors over the long term with those 'Visiting friends or relatives' accounting for around a quarter of visitors.*
- *There has been a decrease in 'Holiday' over more recent periods with corresponding gain in 'Visiting friends or relatives'.*

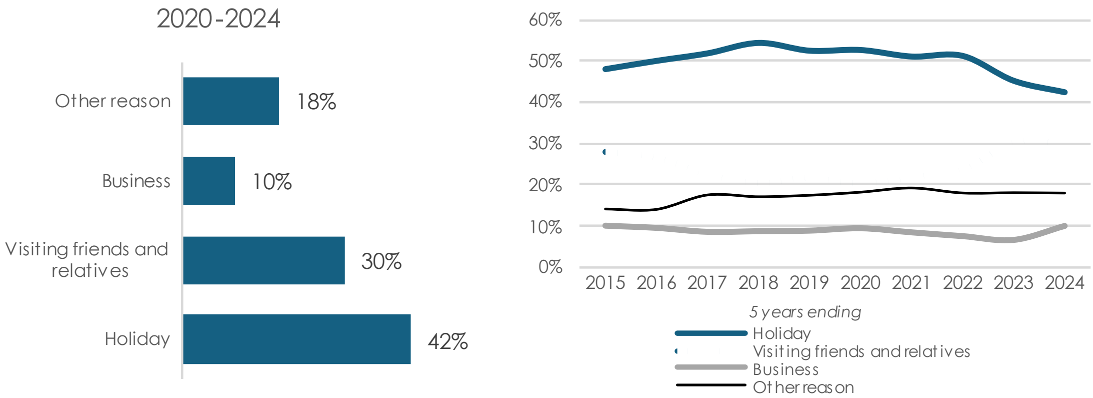


Figure 21 – Main Reason for Visit; Percentage of domestic day visitors (2020-24 and rolling 5 year average).
SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Subject to sample error

Seasonality (Quarter in year)

Refer Figure 22a & b next page.

- *The March quarter has always dominated but there has been a clear reduction in significance during recent periods (potentially due to a number of severe weather events in that quarter).*
- *The December quarter has overtaken the June quarter recently to become the second most significant quarter.*
- *The September quarter has clearly fallen behind the other three quarters post-Covid.*

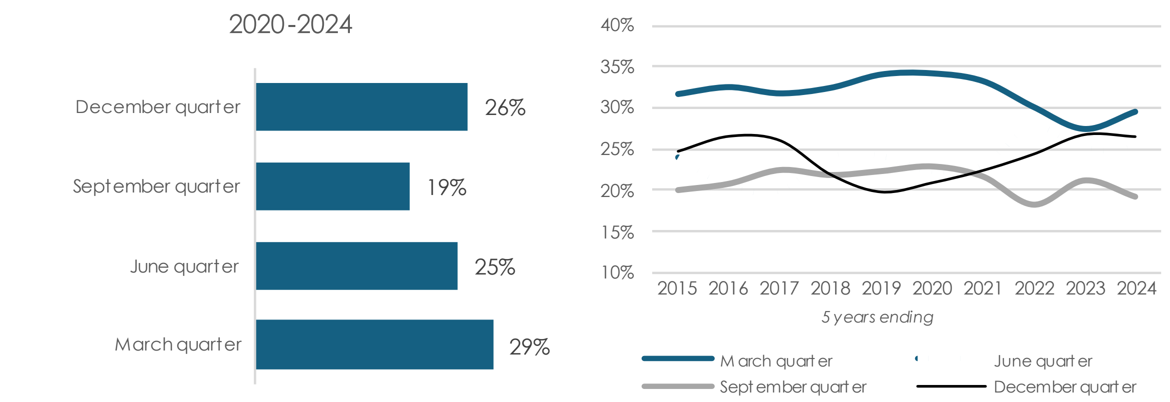


Figure 22a & b – Quarter of Visit; Percentage of domestic day visitors (2020-24 and rolling 5 year average).

SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Subject to sample error

Day of Week

- *There has been very little change in the day of visit – particularly for Saturday, Sunday, Monday and Tuesday.*
- *Unlike many LGAs Sunday is well below Saturday and is on par with Wednesday and; to a lesser extent, Friday.*

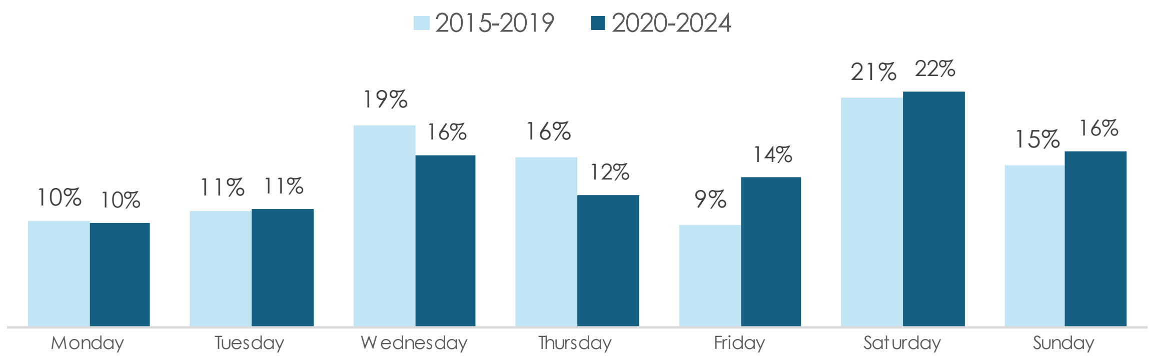


Figure 23 – Day of week visited; Percentage of domestic day visitors (2020-24 and rolling 5 year average).

SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Subject to sample error

Activities (Top 5)

Refer Table 5 next page.

- *'Eat out / dine at a restaurant and/or café' has always been the number one ranked activity but the percentage of visitors engaging in this activity has reduced over time (4% less compared to pre-Covid).*
- *'Visiting friends and relatives' has always been the second ranked activity and stable in terms of uptake (at around 30%) over the long term.*
- *'Go shopping for pleasure' and 'Go to the beach' have a similar uptake in the most recent period and share the third and fourth ranked position over time.*
- *'Sightseeing/looking around' has always ranked as the fifth most significant activity.*
- *No other activities have an uptake greater than 10% in the latest period.*

ACTIVITY	2015 Rank	2019 Rank	2024 Rank	2024 Uptake	2024 VS 2015	2024 VS 2019
Eat out / dine at a restaurant and/or cafe	1	1	1	43%	-6%	-4%
Visit friends & relatives	2	2	2	30%	-0%	+6%
Go shopping for pleasure	3	4	3	21%	-3%	+3%
Go to the beach	4	3	4	19%	+0%	-4%
Sightseeing/looking around	5	5	5	12%	+1%	+1%

Table 5 – Top five activities (as per period ending 2024); Domestic Day Visitors

SOURCE: National Visitor Survey, Tourism Research Australia (TRA). Copywrite remains with TRA. Caution: Subject to sample error

6. International Overnight Visitors

Note 1: The International Visitor Survey (IVS) does not provide estimates of day visitation.

Note 2: The IVS was suspended late in the first quarter of 2020 due to Covid-related international border restrictions. It recommenced gradually over the course of 2022 and reached returned to pre-Covid sampling early in 2023. Estimates for 2020, 2021 and 2022 should therefore be treated with additional caution. Year-on-year percentage changes are not available for 2020-2023.

6.1 Overnight Visitation

Figure 24 shows that an estimated 11,000 international visitors spent at least one night in the Ballina LGA in 2024. This is 29% below the 2015-2019 average and 35% below 2019. By comparison, the 2024 North Coast visitation of 292,000 was 14% below the 2015-2019 average and 22% below 2019. This comparison, however, ignores sample error associated with each estimate and should be treated with caution. The estimates for Regional NSW has a much larger sample size and lower sample error. This shows that international visitation in 2024 was 12% lower than the 2015-2019 average and 17% below 2019. This provides important context for the Ballina estimates and indicates that Ballina is tracking at a similar to trajectory of the broader market.

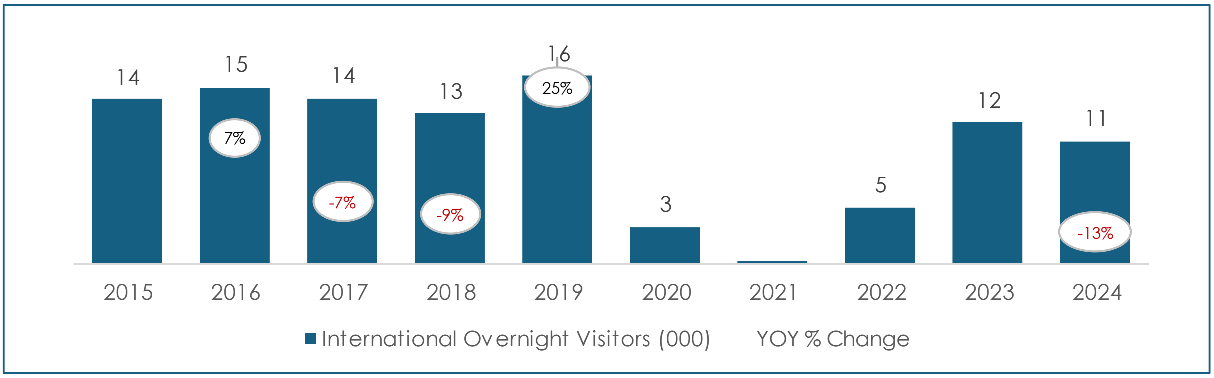


Figure 24 – International Overnight Visitors; 2015-2024

SOURCE: International Visitor Survey (IVS), Tourism Research Australia (TRA). Copywrite remains with TRA. Note: the IVS was suspended in early 2020 and did not return to pre-Covid sampling until early 2023. Caution: Subject to sample error. Estimates from 2020-2022 should be treated with additional caution.

6.2 Visitor Nights

Figure 25 shows that international visitors spent an estimated 153,000 nights in the Ballina LGA in 2024. This was 16% above the 2015-2019 average and 11% above 2019. The North Coast Region, by comparison, was up 5% on the 2015-19 average but 7% below 2019. As with the international overnight visitor comparison these percentage changes do not consider the underlying sample error and should be treated with caution. From a broader perspective, Regional NSW as a whole was up 21% on the 2015-2019 average and 19% up on 2019. This should not be seen as a concern given length of stay in Regional NSW LGAs varies widely.

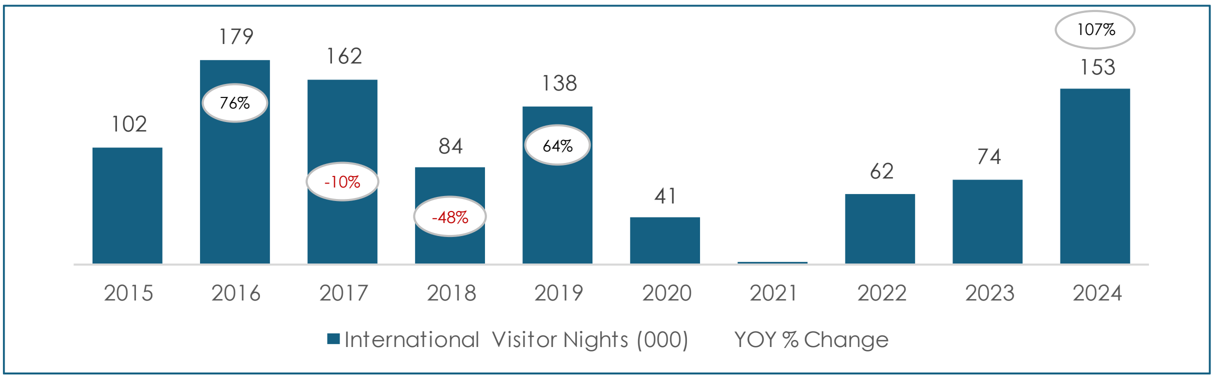


Figure 25 - International Visitor Nights; 2015-2024

SOURCE: International Visitor Survey (IVS), Tourism Research Australia (TRA). Copywrite remains with TRA. Note: the IVS was suspended in early 2020 and did not return to pre-Covid sampling until early 2023. Caution: Subject to sample error. Estimates from 2020-2022 should be treated with additional caution.

6.3 Overnight Visitor Profile

Note: Visitor profile estimates use a three year average to increase sample size.

Country of Origin

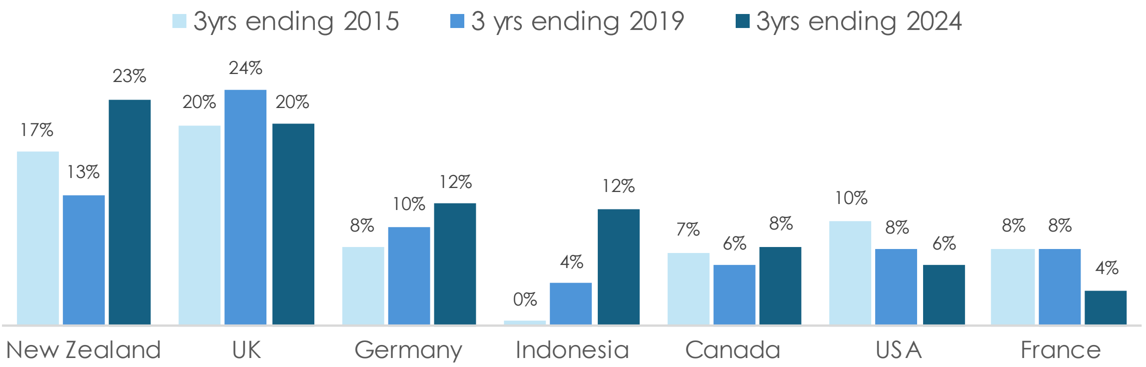


Figure 26 - Country of Origin Comparison – Percentage of Visitors - 3yrs ending 2015, 2019 & 2024

SOURCE: International Visitor Survey (IVS), Tourism Research Australia (TRA). Copywrite remains with TRA. Note: the IVS was suspended in early 2020 and did not return to pre-Covid sampling until early 2023. Caution: Subject to sample error. Estimates for the 3yrs ending 2024 should be treated with additional caution.

Purpose of Visit

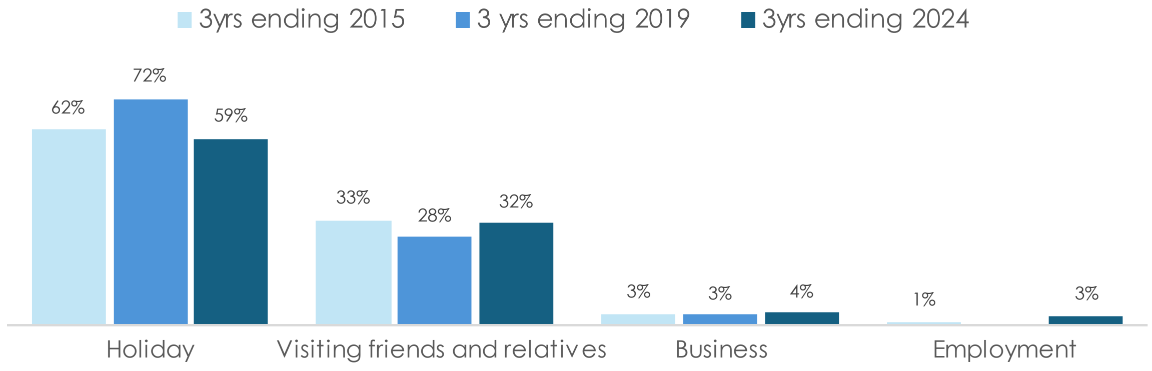


Figure 27 – Purpose of Visit Comparison - Percentage of Visitors – 3yrs ending 2015, 2019 & 2024

SOURCE: International Visitor Survey (IVS), Tourism Research Australia (TRA). Copywrite remains with TRA. Note: the IVS was suspended in early 2020 and did not return to pre-Covid sampling until early 2023. Caution: Subject to sample error. Estimates for the 3yrs ending 2024 should be treated with additional caution.

Accommodation Type (nights)

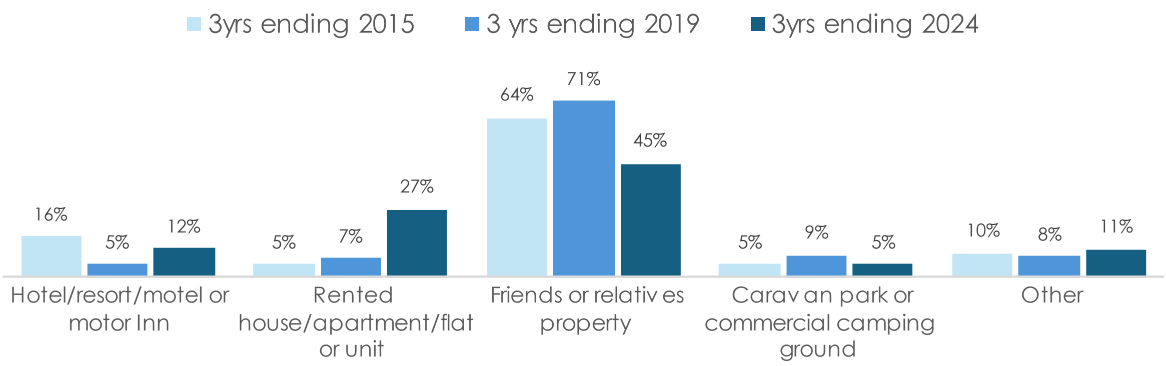


Figure 28 – Accommodation Type Comparison – Percentage of Visitor Nights - 3yrs ending 2015, 2019 & 2024

SOURCE: International Visitor Survey (IVS), Tourism Research Australia (TRA). Copywrite remains with TRA. Note: the IVS was suspended in early 2020 and did not return to pre-Covid sampling until early 2023. Caution: Subject to sample error. Estimates for the 3yrs ending 2024 should be treated with additional caution.

Travel Party Type

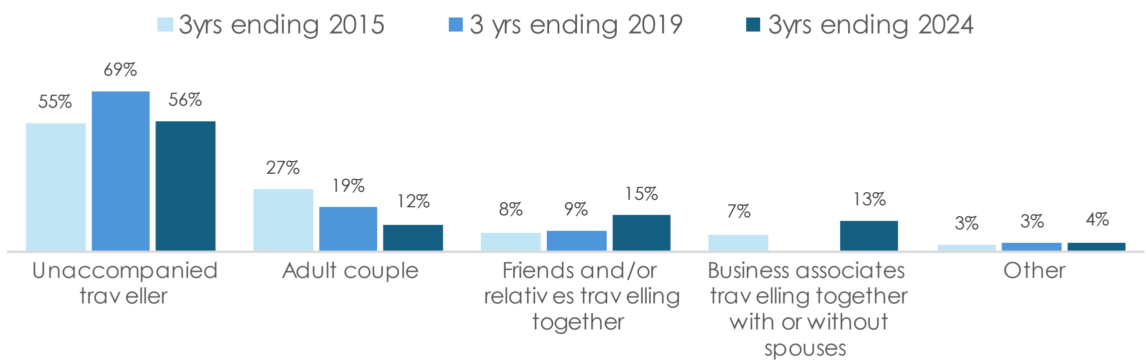


Figure 29 – Travel Party Type Comparison – Percentage of Visitors - 3yrs ending 2015, 2019 & 2024

SOURCE: International Visitor Survey (IVS), Tourism Research Australia (TRA). Copywrite remains with TRA. Note: the IVS was suspended in early 2020 and did not return to pre-Covid sampling until early 2023. Caution: Subject to sample error. Estimates for the 3yrs ending 2024 should be treated with additional caution.