



Destination
North Coast NSW

The Value of Tourism to North Coast 2024



**Every minute of every day,
Tourism delivers \$11,651 of
total visitor spend into
the North Coast DN**

**That is over \$16.8 million per day!
A value that has grown by 19.0%
since year ended (YE) December 2019.**

**In 2024, there were 13.8 million total visitors to the North Coast DN,
11.2 per cent below the pre-Covid period (YE December 2019).**

Note: data in this report is from Financial Year (FY) 2023-24 (Jul 23 – Jun 24) or Calendar Year 2024 (Jan 24 – Dec 24). Please refer to individual source notes for the specific time reference.

Note: Through out this report there are number of non-publishable data points due to restrictions with the data and small sample sizes. This non-publishable data is noted with an * and cannot be provided or reported on.

The tourism sector filled **7.5%** of local jobs, supported **8,200** businesses and directly delivered **5.4%** of the region's Gross Value Add (GVA). GVA has grown at an annual average rate of **6.6%** since FY2016/17.

**Historical economic data is only available from FY2016-17 onwards for comparisons.*

TOURISM SECTOR IN NSW

In FY2023-24, NSW's tourism sector (5.5% share of state GVA) ranked 6th out of the 9 key sectors in NSW, outperforming Agriculture, Forestry & Fishing (1.8%), Mining (3.3%) and Education & Training (5.5%).

In FY2023-24, the visitor economy filled 6.6% (328,200) of the total jobs in NSW. This was 35% above the 7-year average for tourism filled jobs (242,900) for the period FY2016/17-2022/23.

Source: TRA. 2025, STSA FY2023-24.

TOURISM INVESTMENT IN NSW

In FY2023-24 Australia's tourism investment pipeline consisted of 346 projects with a total value of \$63.4 billion. NSW held the largest share (27%) of projects nationwide, with 94 projects valued at \$16.3bn. Of this value \$15.0 billion was invested in the Sydney Tourism Region and \$1.2 billion was in regional NSW. By sector:

1. Arts, recreation & business services (\$7.6bn)
2. Aviation (\$5.8bn)
3. Accommodation (\$2.9bn)

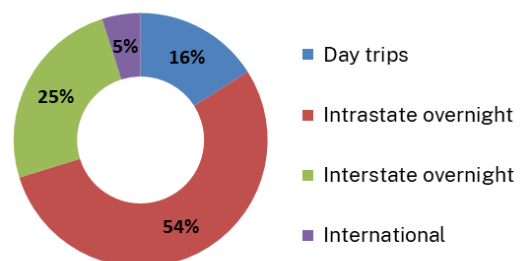
Note: this pipeline includes publicly-known tourism-related projects with an estimated financial value of \$20 million or more in 3 main segments - aviation; art, recreation and business services; and accommodation. Regional NSW is all areas of NSW except for Sydney TR.
Source: TRA. 2025. Tourism Investment Monitor FY2023-24.

ECONOMIC VALUE OF REGIONAL TOURISM

Tourism consumption in the North Coast DN represented about 12% of NSW's total tourism consumption, over half of which was delivered by the intrastate overnight market (54%).

Note: tourism consumption is estimated using regional data from TRA.
Source: TRA. 2025. STSA FY2023-24.

North Coast \$7.1 bn
Share of DN consumption



REGIONAL TOURISM FILLED JOBS & BUSINESSES

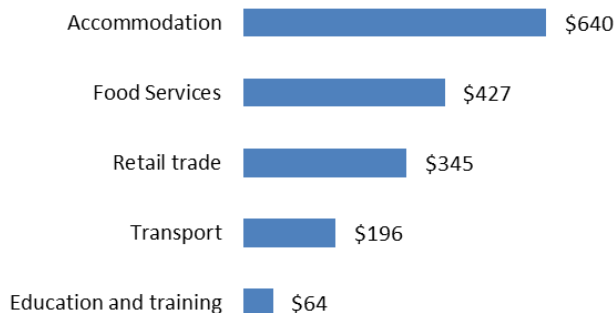
Tourism's DIRECT filled jobs

FULL TIME 11,311

PART TIME 13,822



North Coast - Industry share of Direct Tourism GVA (\$m)



The tourism sector filled 7.5% of local jobs including 25,134 direct jobs and 12,234 indirect jobs. There were around 8,200 tourism related businesses in the North Coast DN, accounting for 21% of all tourism businesses in Regional NSW.

Note: tourism employment and businesses are estimated using regional data from TRA. Source: TRA. 2025. STSA FY2023-24; TRA. 2025. Tourism Businesses in Australia, June 2024.

Within this DN, tourism businesses directly delivered \$2.0 billion (5.4%) of the region's GVA – over 80% of which was from Accommodation, Food Service, Retail Trade, Transport and Education & Training sectors.

Note: GVA is estimated using regional data from TRA. Source: TRA. 2025. STSA FY2023-24.

ACCOMMODATION

Establishments with 10 rooms or more		SUPPLY			DEMAND		REVENUE		
Year ended	Establishments	Rooms	Room nights available (000)	Room nights occupied (000)	Room occupancy rate	Takings from accommodation	Average daily rate	Revenue per available room	
	no.	no.	no.	no.		\$ millions	\$	\$	
North Dec-2024	350	11,583	4,215	2,646	62.8%	654	247	155	
Coast DN %Ch on 2023	-0.3%	-0.5%	-1.5%	1.3%	1.8 ppts*	3.3%	1.9%	4.9%	

*percentage point change

North Coast DN has 350 commercial accommodation establishments with 11,583 rooms.

Source: STR. Jul 2025. Tourist Accommodation. Dec 2024.

AVIATION



Domestic direct inbound flights to the North Coast DN have declined in 2024 with a total of 8,296 flights (-13.9% YoY) delivering 713,025 seats (-10.6% YoY).

Note: airports operating commercial flights in this DN are Ballina (BNK), Coffs Harbour (CFS), Grafton (GFN), Lismore (LSY), Lord Howe Island (LDH), Port Macquarie (PQQ) & Taree (TRO).

Source: Cirium. Jul 2025. SRS Analyser. 2024.

Travel to North Coast DN 2024

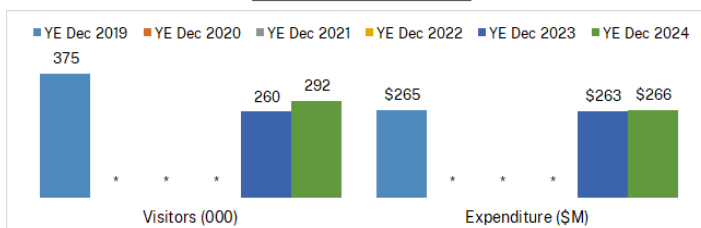
DN Visitation Overview

Source: TRA. 2025. National Visitor Survey & International Visitor Survey. YE Dec 2024.

- Total visitors to the North Coast were **11% lower** than YE Dec 2019.
- Visitor expenditure has **grown 19%** since YE Dec 2019.
- Visitors **grew 8%** since YE Dec 2023 but nights (+1%) and expenditure (-0.3%) are mostly stable.
- North Coast is the **No. 1 DN** for nights and spend and **No. 2 DN** for visitors.



Visitors and Expenditure



Share of International Visitors to DN

Top Origin	Visitor Share		Expenditure Share	
	YE Dec 2019	YE Dec 2024	YE Dec 2019	YE Dec 2024
UK	18.3%	23.5%	16.3%	17.3%
New Zealand	9.6%	12.8%	8.6%	12.2%
USA	8.5%	8.7%	7.2%	7.0%
Germany	10.8%	6.9%	5.1%	3.0%
France	4.6%	4.4%	2.5%	2.1%

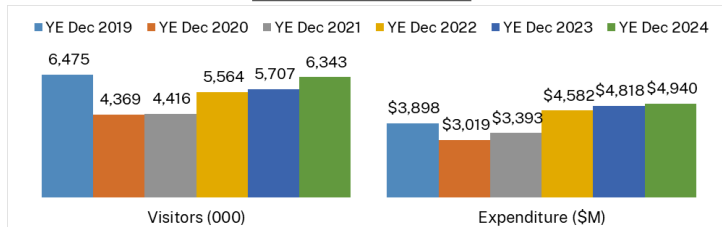
Top Origin	Visitor Share	
	YE Dec 2019	YE Dec 2024
Europe	54.6%	56.5%
Asia	16.4%	12.6%
North America	12.4%	12.6%
Other Countries	16.6%	18.3%



International



Visitors and Expenditure



Share of Domestic Overnight Visitors to DN

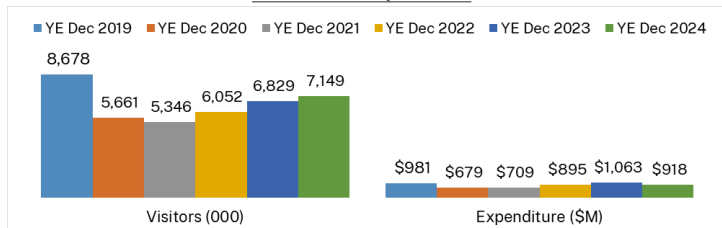
Top Origin	Visitor Share		Expenditure Share	
	YE Dec 2023	YE Dec 2024	YE Dec 2023	YE Dec 2024
Sydney	25.8%	23.6%	29.3%	29.5%
Regional NSW	40.7%	36.7%	39.7%	36.4%
Total Intra-state	66.5%	60.3%	69.1%	65.9%
Queensland	25.1%	31.9%	19.3%	23.1%
Victoria	4.8%	5.6%	6.3%	7.2%
ACT	*	*	*	*
Other States	*	*	*	*
Total Interstate	33.5%	39.7%	30.9%	34.1%



Domestic Overnight



Visitors and Expenditure



Share of Domestic Daytrip Visitors to DN

Top Origin	Visitor Share		Expenditure Share	
	YE Dec 2023	YE Dec 2024	YE Dec 2023	YE Dec 2024
Intra-state	72.4%	75.6%	80.6%	79.9%
Interstate	27.6%	24.4%	19.4%	20.1%



Domestic Daytrip



Note: Through out this report there are number of non-publishable data points due to restrictions with the data and small sample sizes. This non-publishable data is noted with an * and cannot be provided or reported on.

More than 75% of the group participate

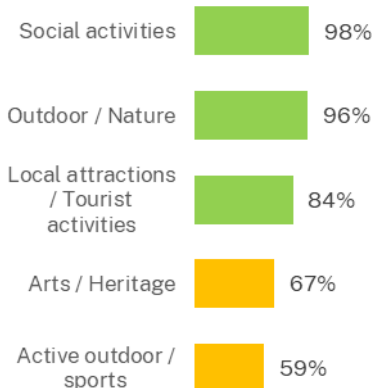
50% - 75% of the group participate

25% - 50% of the group participate

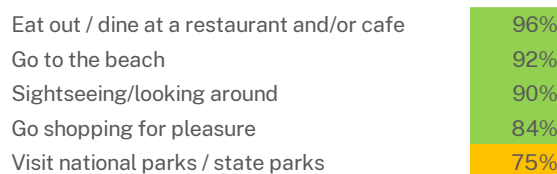
International



Top 5 categories



Top 5 activities

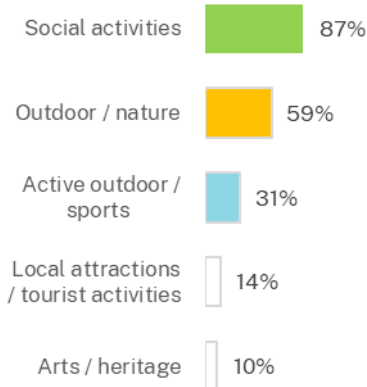


Note: international visitors who visited North Coast DN may participate in these activities somewhere else in Australia.

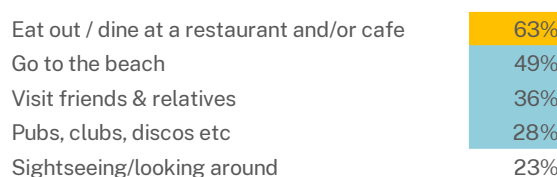
Domestic Overnight



Top 5 categories



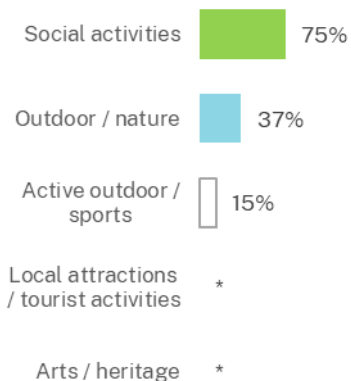
Top 5 activities



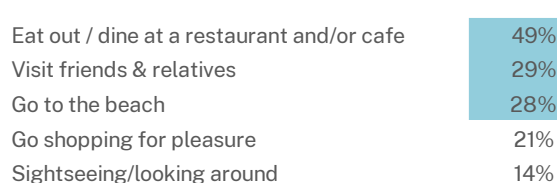
Domestic Daytrip



Top 5 categories



Top 5 activities



Travel to North Coast DN 2024

Events

Source: TRA. 2025. National Visitor Survey & International Visitor Survey. YE Dec 2024.

In 2024, the North Coast DN secured events that delivered **\$214 million** worth of domestic overnight visitor expenditure into the state.

NORTH COAST DN EVENTS DELIVERED:



211,000

VISITORS
(000)



533,000

NIGHTS
(000)

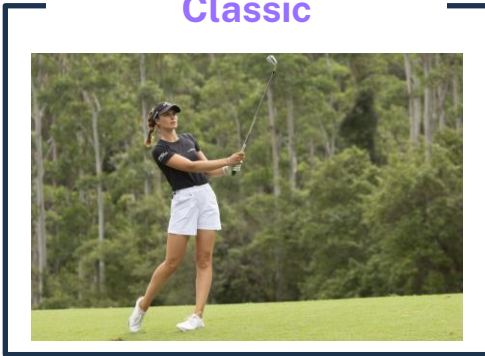


\$214

EXPENDITURE
(\$M)

SAMPLE EVENTS SPONSORED BY DNSW IN NORTH COAST DN

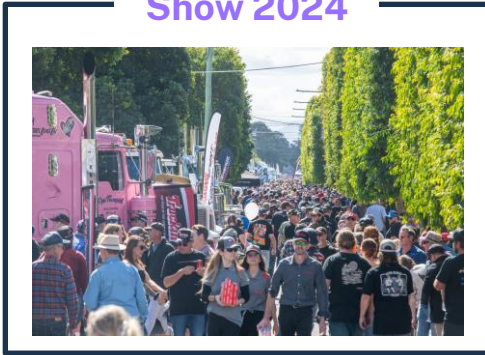
Australian Women's
Classic



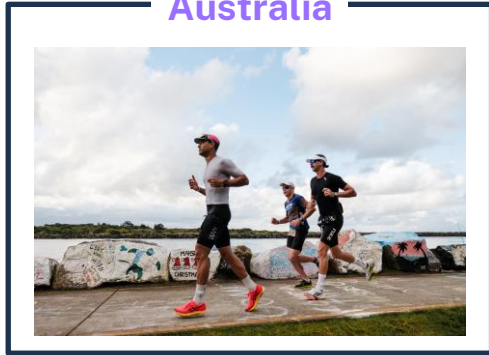
Bluesfest



Casino Truck
Show 2024



Ironman
Australia



Touch Football
The Championships



Australian Surf
Championships



Note: International and domestic daytrip event data are not publishable for North Coast DN. Event data is not specific to DNSW sponsored events. Event visitors refer to those whose purpose of visit to NSW was either to participate in or watch organized sporting events, attend a specific leisure event or festival, attend a convention, conference, seminar, trade fair or exhibition and those accompanying them and/or attend Olympics or Paralympics (domestic visitors only).

Photo Credit: Destination NSW

NORTHERN RIVERS

MID NORTH COAST

7,266

VISITORS (000)



11,638

NIGHTS (000)



\$2,828

EXPENDITURE (\$M)



6,748

VISITORS (000)



12,714

NIGHTS (000)

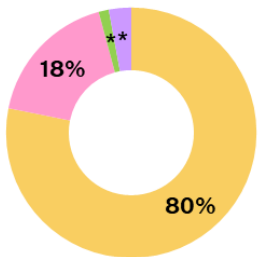


\$3,177

EXPENDITURE (\$M)



International



224

VISITORS (000)



2,622

NIGHTS (000)



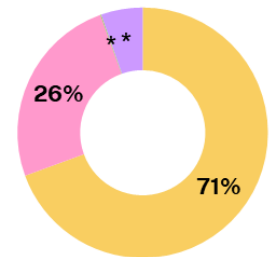
\$188

EXPENDITURE (\$M)



113

VISITORS (000)



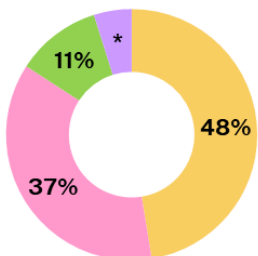
1,264

NIGHTS (000)

\$77

EXPENDITURE (\$M)

Domestic Overnight



3,003

VISITORS (000)



9,016

NIGHTS (000)



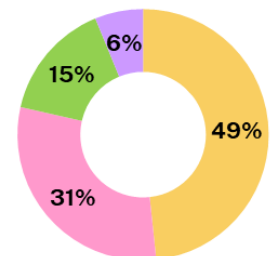
\$2,099

EXPENDITURE (\$M)



3,525

VISITORS (000)



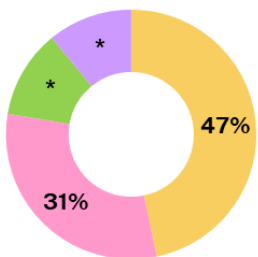
11,450

NIGHTS (000)

\$2,723

EXPENDITURE (\$M)

Domestic Daytrip



4,038

VISITORS (000)



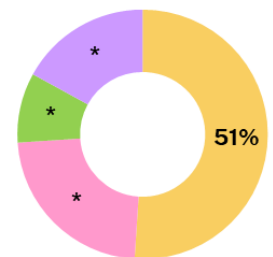
\$542

EXPENDITURE (\$M)



3,110

VISITORS (000)



\$376

EXPENDITURE (\$M)

Note: data only covers the specific TR areas within this DN. Through out this report there are number of non-publishable data points due to restrictions with the data and small sample sizes. This non-publishable data is noted with an * and cannot be provided or reported on.

NORTHERN RIVERS

TOTAL Northern Rivers	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	7,266	224	3,004	4,039
Share of NC %	53%	77%	47%	56%
Expenditure (\$M)	\$2,828	\$188	\$2,099	\$542
Share of NC %	46%	71%	42%	59%

Ballina LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,029	11	423	*
Share of NC %	7%	4%	7%	-
Expenditure (\$M)	\$531	\$15	\$449	*
Share of NC %	9%	5%	9%	-

Byron LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,926	173	837	916
Share of NC %	14%	59%	13%	13%
Expenditure (\$M)	\$891	\$107	\$666	\$118
Share of NC %	15%	40%	13%	13%

Clarence Valley LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,374	10	666	*
Share of NC %	10%	3%	11%	-
Expenditure (\$M)	\$482	\$6	\$384	*
Share of NC %	8%	2%	8%	-

Lismore LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	761	*	262	*
Share of NC %	6%	-	4%	-
Expenditure (\$M)	\$181	*	\$83	*
Share of NC %	3%	-	2%	-

Richmond Valley LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	434	*	*	*
Share of NC %	3%	-	-	-
Expenditure (\$M)	\$116	*	*	*
Share of NC %	2%	-	-	-

Tweed LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,699	34	727	938
Share of NC %	12%	12%	11%	13%
Expenditure (\$M)	\$590	\$36	\$427	\$127
Share of NC %	10%	14%	9%	14%

Northern Rivers also includes Kyogle LGA

MID NORTH COAST

TOTAL Mid North Coast**	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	6,748	113	3,525	3,111
Share of NC %	49%	39%	56%	44%
Expenditure (\$M)	\$3,177	\$78	\$2,723	\$376
Share of NC %	52%	29%	55%	41%

Bellingen LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	240	*	*	*
Share of NC %	2%	-	-	-
Expenditure (\$M)	\$89	*	*	*
Share of NC %	1%	-	-	-

Coffs Harbour LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,887	55	1,061	*
Share of NC %	14%	19%	17%	-
Expenditure (\$M)	\$1,098	\$36	\$936	*
Share of NC %	18%	14%	19%	-

Kempsey LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	551	*	362	*
Share of NC %	4%	-	6%	-
Expenditure (\$M)	\$263	*	\$230	*
Share of NC %	4%	-	5%	-

Mid-Coast LGA**	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	2,361	19	1,170	1,172
Share of NC %	17%	6%	18%	16%
Expenditure (\$M)	\$872	\$8	\$740	\$123
Share of NC %	14%	3%	15%	13%

Nambucca LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	280	*	*	*
Share of NC %	2%	-	-	-
Expenditure (\$M)	\$95	*	*	*
Share of NC %	2%	-	-	-

Port Macquarie-Hastings LGA	Total Tourism	Inter-national	Domestic Overnight	Daytrip
Visitors (000)	1,734	48	871	815
Share of NC %	13%	17%	14%	11%
Expenditure (\$M)	\$759	\$21	\$654	\$85
Share of NC %	12%	8%	13%	9%

Notes:

- ❑ Total Tourism Region (TR) data covers the TR areas within the DN boundary.
- ❑ Certain LGAs presented above may be located within multiple TRs. Only 1 table per LGA is provided.
- ❑ Total visitor and expenditure figures are indicative only if the data (labelled with *) of its certain visitor type is unpublshable.
- ❑ Certain LGAs/TRs within this DN may not be listed above due to no publishable data.