

BYRON SHIRE TOURISM MONITOR

June 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

ABN: 78661014505

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

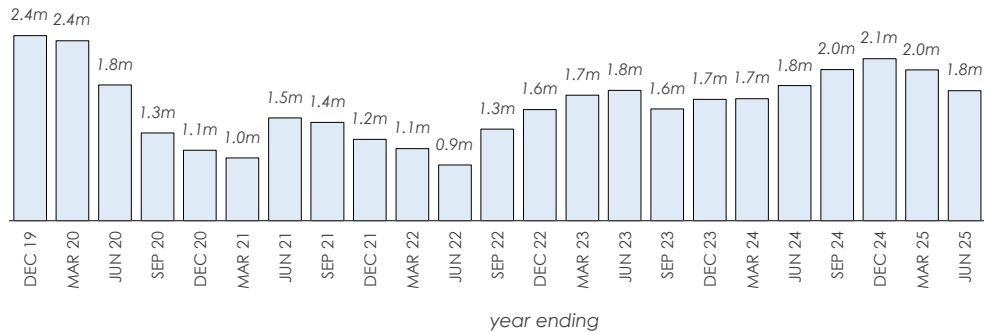
- Adjusted domestic overnight visitors and visitor nights estimate for the December quarters of 2024 and the unadjusted DoTs estimates for the March, June and September quarters from 2025 (reported in addition to year end).
- As above for domestic day visitors

Year ending December 2025 Monitor & beyond

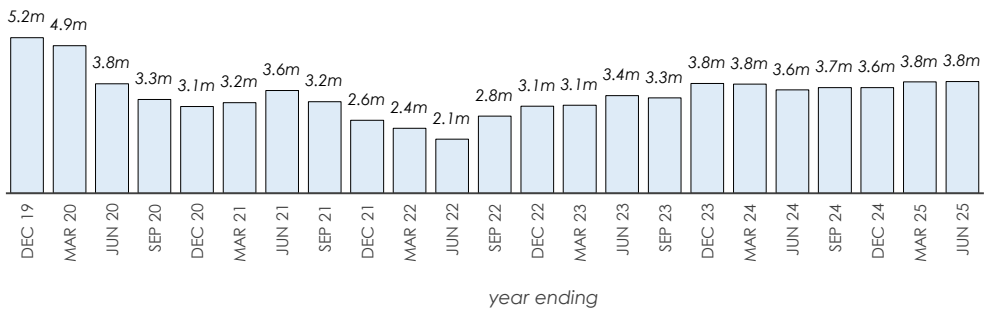
- Unadjusted DoTs estimates for the March, June, September and December quarters from 2025.
- As above for domestic day visitors.

OVERVIEW FOR THE YEAR ENDING JUNE 2025

TOTAL VISITORS (m)



TOTAL NIGHTS (m)



VISITOR SPEND ESTIMATE FOR THE YEAR ENDING MARCH

\$816 million

VISITOR CATEGORY KEY POINTS

DOMESTIC OVERNIGHT VISITORS

YE JUNE '25: 788,000 visitors; \$536m estimated total spend.
JUNE '25 QTR: 162,000 visitors; estimated \$ per visitor not available this quarter.

DOMESTIC VISITOR NIGHTS

YE JUNE '25: 2.1 million nights; ;Average length of stay 2.7 nights
JUNE '25 QTR: 463,000 nights; Average length of stay 2.9 nights

DOMESTIC DAY VISITORS

YE JUNE '25: 815,000; estimated total spend \$158 million
JUNE '25 QTR: 167,000 visitors; estimated spend per visitor \$200.

INTERNATIONAL OVERNIGHT VISITORS

YE JUNE '25: 180,000; 13% up year-on-year; Total spend estimate \$122m

INTERNATIONAL VISITOR NIGHTS

YE JUNE '25: 1.7 million; 56% up year-on-year; Avg. length of stay 9.7 nights

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

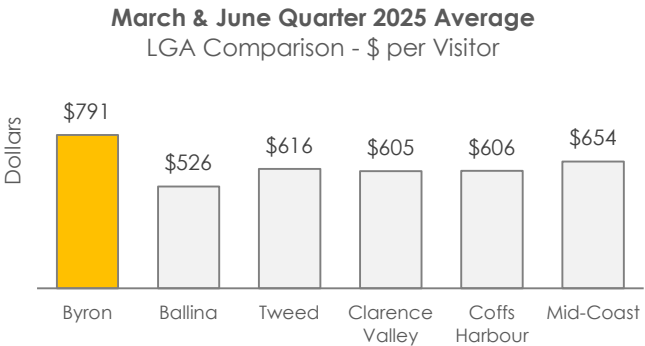
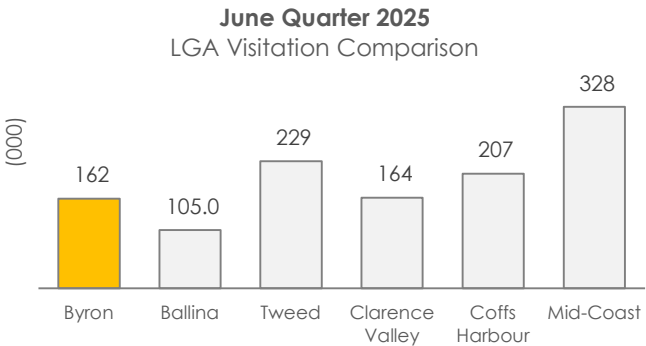
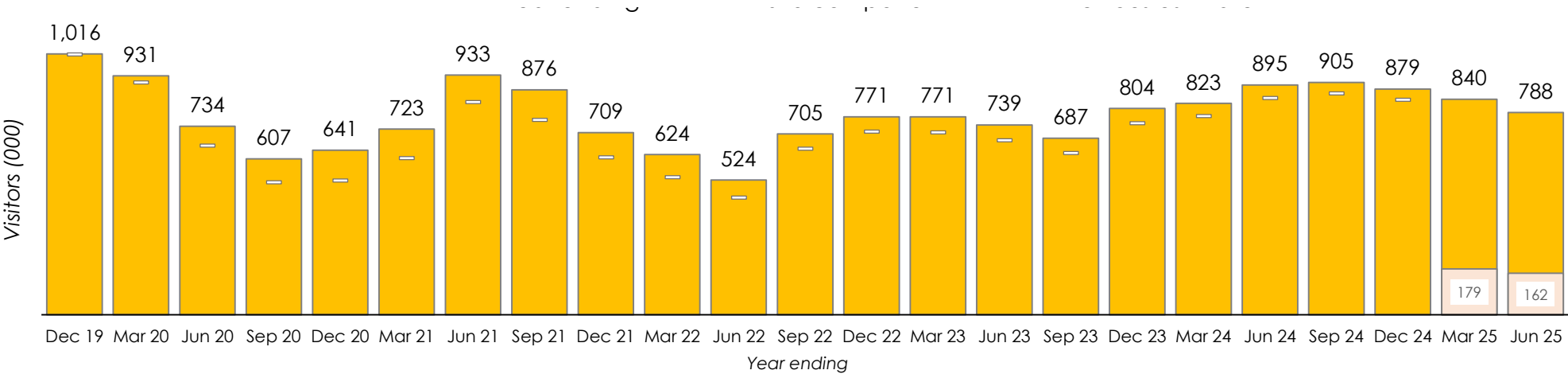
Source: Data-extracted from Tourism Research Australia's National and International Visitor Survey datasets under licence by Peter Valerio. All data, and the differences between data points, and percentage share calculations are subject to sample survey error.

Domestic Overnight Visitors

Refer explanatory notes on page 1

KEY POINTS FOR THE LATEST YEAR END PERIOD AND QUARTER:

- An estimated 788,000 domestic visitors spent at least one night in the Byron Shire in the year ending June 2025. This estimate comprises adjusted data from September-December 2024 quarters and the March-June quarters of 2025. Please review the assumptions on page 1.
- Although a year-on-year (YOY) percentage change has not been calculated given the estimate uses data from two methodologies, the latest year end period is lower, on paper at least, to the adjusted year end June 2024 period. The difference, however, is purely indicative.
- In the June 2025 quarter of the latest year ending period an estimated 162,000 domestic visitors spent at least one night in the Byron Shire - 10% lower than the March 2025 quarter. There is no comparable data from 2024. LGA visitation comparisons for the June quarter are shown in the chart @ bottom left.
- June quarter spend data is not available for the Byron Shire. Best available is the average got the combined March & June quarters. This was \$791 per visitor. As shown in the chart @ bottom centre this was considerably higher than all five comparison LGAs.
- Total estimated year ending spend was \$536m. This is based on the average spend per night for the March and June 2025 quarters (\$256) and the year



YEAR ENDING EXPENDITURE ESTIMATE

If it is assumed that spend per night in the latest year ending period was the same the average of the March and June '25 quarters as modelled by TRA for the March 2025 quarter (i.e. \$256 per night) total expenditure was:

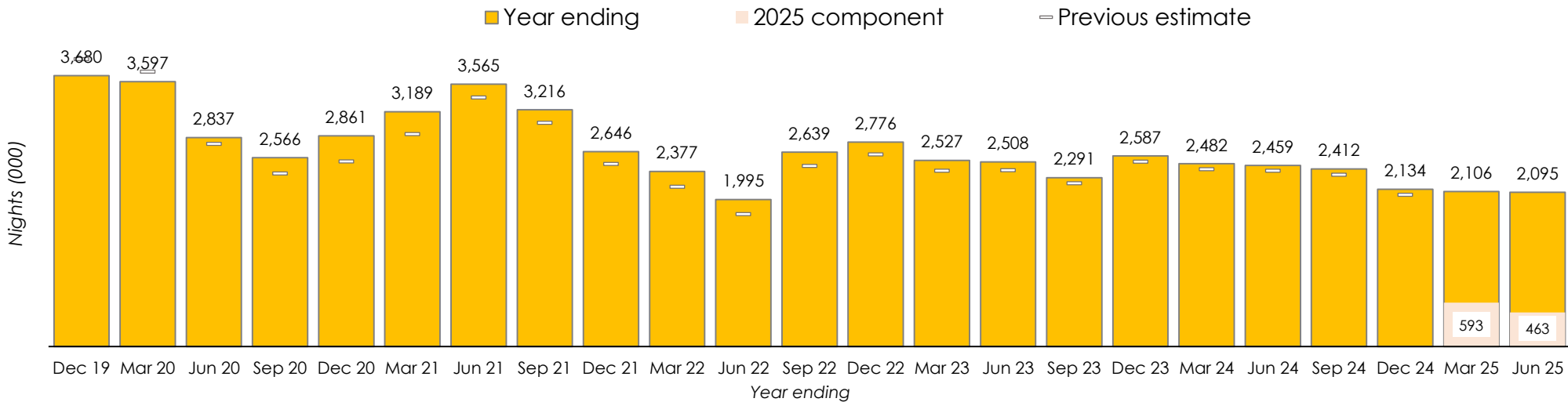
\$536 million

Domestic Visitor Nights

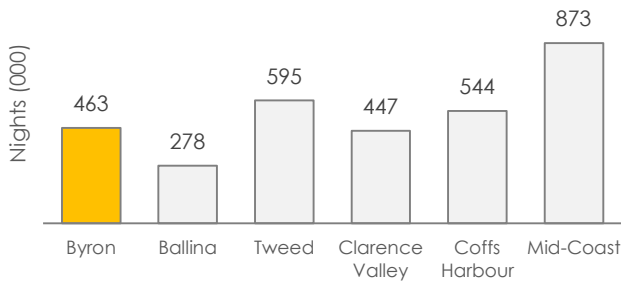
Refer explanatory notes on page 1

KEY POINTS FOR THE LATEST YEAR END PERIOD AND QUARTER:

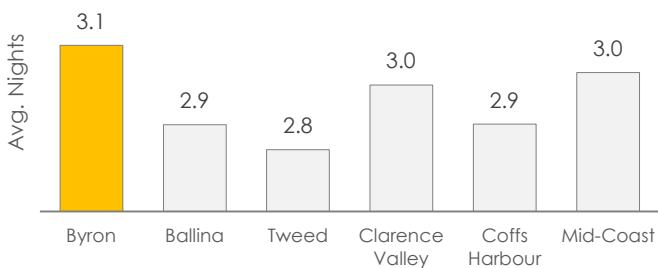
- Domestic overnight visitors spent an estimated 2.1 million nights in the Byron Shire in the year ending June 2025. This estimate comprises adjusted data from September-December 2024 and the unadjusted data from the March and June 2025 quarters.
- Noting that a year-on-year (YOY) percentage change is not a valid calculation given it would use data from methodologies, visitor nights volume in the latest year end period is - on paper at least - lower than the year ending June 2024. This difference, however, is only indicative.
- In the June 2025 quarter domestic visitors spent and estimated 463,000 nights in the Byron Shire. There is no comparable quarterly data for 2024. The June quarter 2025 estimate was, however, 22% lower than the March quarter. Visitor nights comparisons for the June quarter are shown in the bottom left chart.
- Average length of stay in the June quarter was 3.1 nights (bottom centre chart).
- Spend data for the June 2025 quarter was not available for Byron Shire. The average spend per night for the combined March and June 2025 quarters was



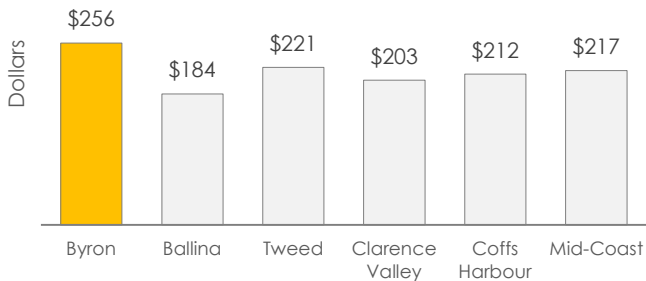
June Quarter 2025
LGA Comparison - NIGHTS



June Quarter 2025
LGA Comparison - AVG. NIGHTS



March & June Quarter Average 2025
LGA Comparison - \$ per night



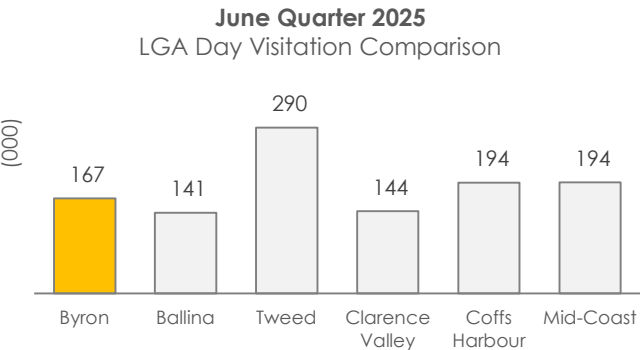
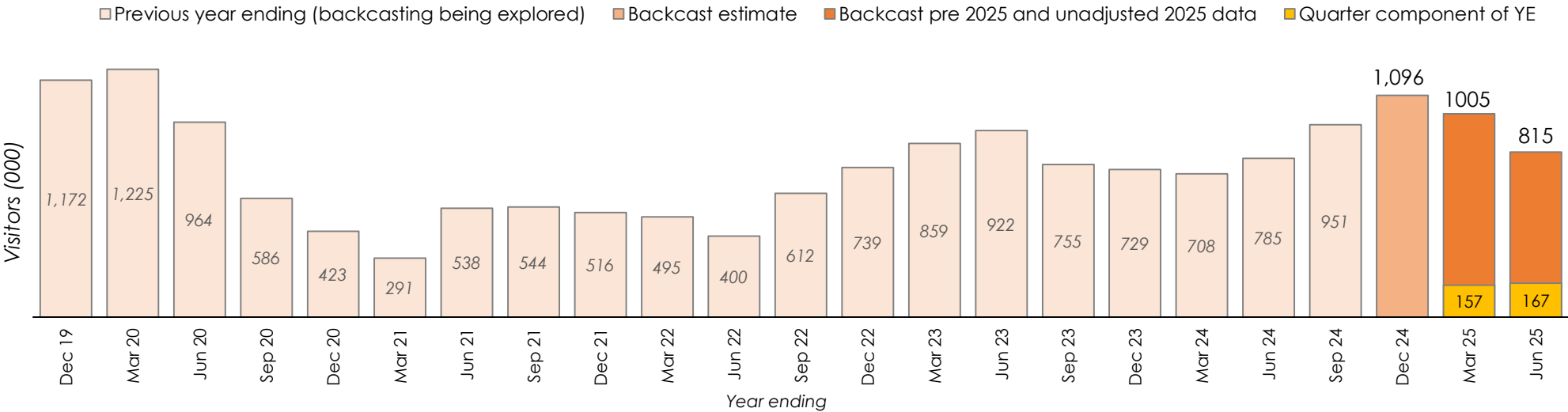
Source: Data-extracted from Tourism Research Australia's National Visitor Survey and DoTs datasets under licence by Peter Valerio. All data is subject to sample survey error and modelling assumptions.

Domestic Day Visitors

Refer explanatory notes on page 1

KEY POINTS FOR THE LATEST YEAR END PERIOD AND QUARTER:

- Data for the March and June 2025 quarters from the new methodology have been released together.
- A preliminary backcast estimate has been applied to calendar 2024 and 2024 components of the year ending March and the year ending June 2025 at this stage. Backcasting of pre 2024 data may or may not be possible and is being investigated.
- Noting the above, Byron Shire hosted an estimated 815,000 domestic day visitors in the year ending June 2025 of which 167,000 were in the June 2025 quarter.
- Average spend per visitor in the March and June quarters respectfully was \$188 and \$200 - well above the two LGAs with available data (others may be available over time depending on the underlying sample size).
- The average of both quarters (\$194) has been used in the year ending June 2025 expenditure estimate. This results in a total year ending expenditure estimate of \$158 million. This is not comparable with previous estimates.



**YEAR END JUNE '25
PRELIMINARY EXPENDITURE
ESTIMATE**

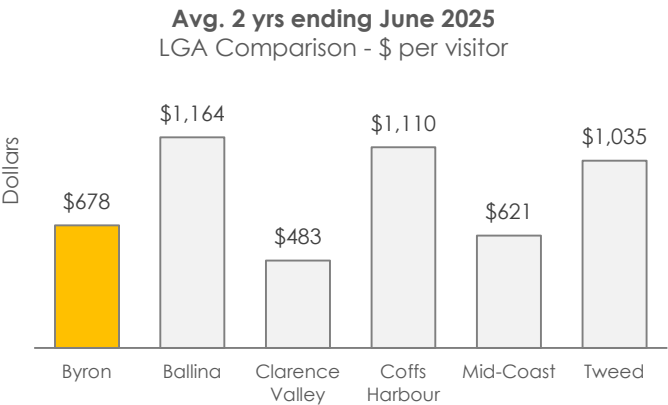
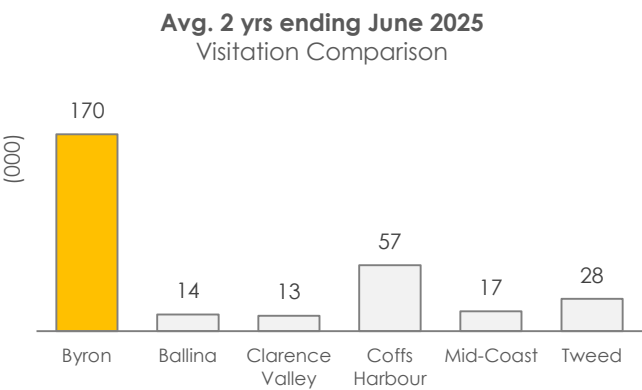
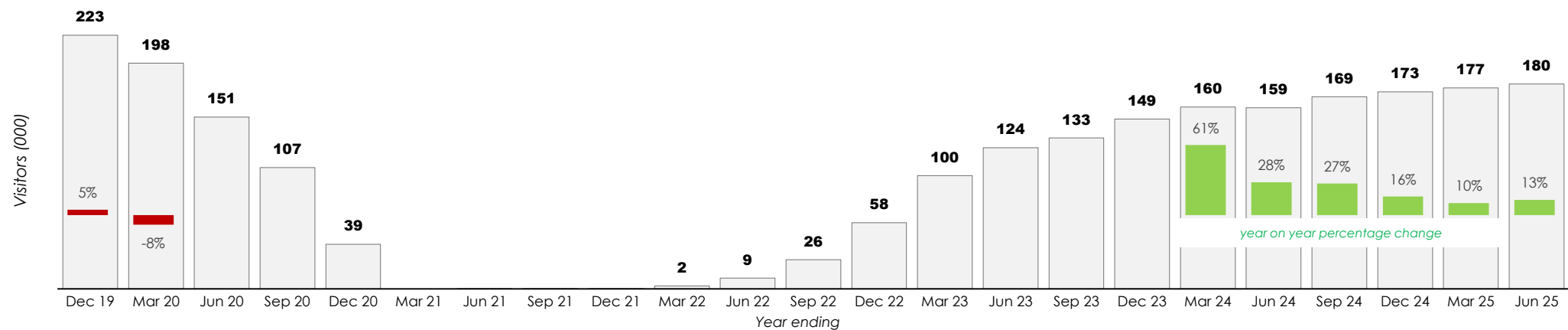
If it is assumed that spend per visitor for the year ending June 2025 was the same as modelled by TRA for average in the March & June '25 quarters (i.e. \$194) total expenditure in the latest 12 month period was:

\$158 million

International Overnight Visitors

KEY POINTS FOR THE LATEST YEAR END PERIOD:

- 180,000 international visitors spent at least one night in Byron Shire LGA in the year ending June 2025
- This is 13% up on the YE June 2024 - a statistically significant change using a slightly relaxed test.
- The latest visitor estimate is 20% lower than the pre-Covid year ending June 2019.
- An average based on a two year time period has been used to provide an underlying sample that support estimates for other LGAs
- The chart bottom left shows that Byron Shire hosted an annual average 170,000 overnight visitors in the two year period ending June 2025 - well above all four comparison LGAs including the neighbouring Tweed (28,000) and Ballina LGAs (14,000).
- The same period has been used to provide comparative spend per visitor estimates (chart bottom centre).
- The total spend estimate for the year ending June 2025 uses the two year spend per visitor average of \$678 in conjunction with the year ending June 2025



**YEAR END JUNE 2025
EXPENDITURE ESTIMATE**

If it is assumed that spend per trip was the same as modelled by TRA for the two years ending June 2025* (i.e. \$678 per visit) total expenditure in the latest 12 month period was:

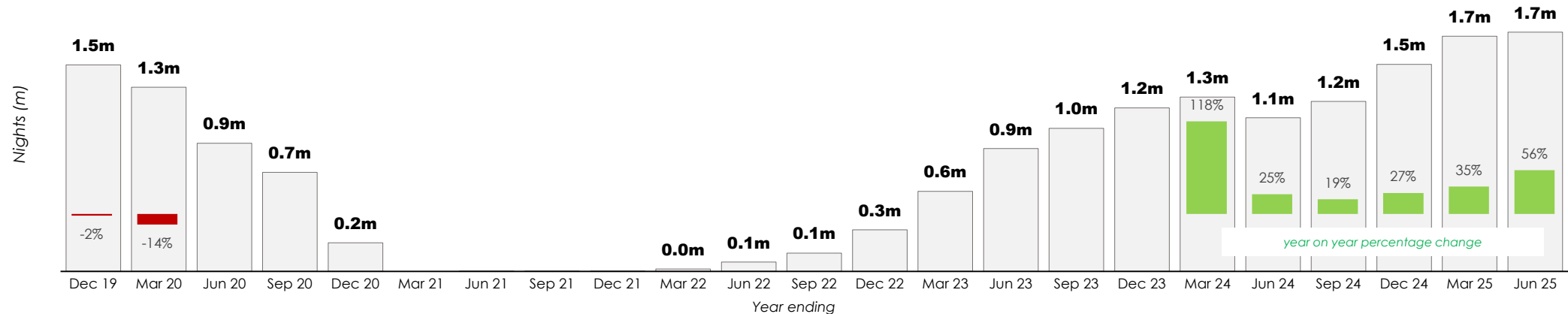
\$122 million

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.

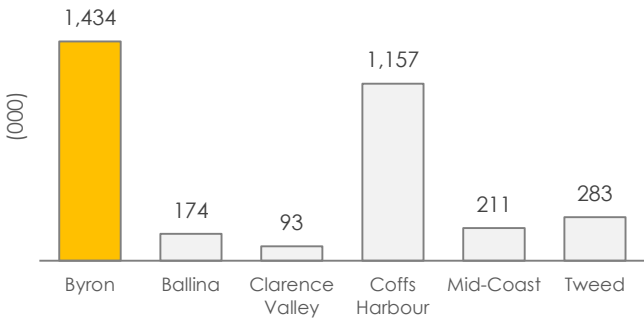
International Visitor Nights

KEY POINTS FOR THE LATEST YEAR END PERIOD:

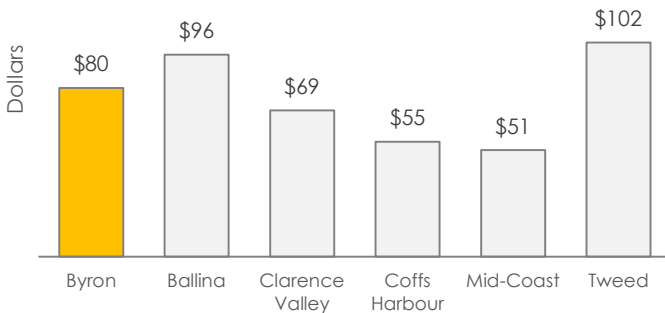
- International visitors spent an estimated 1.7 million nights in the Byron Shire in the latest year end period.
- This is 56% higher than the year end March 2024 (this is a statistically significant change when a standard test is applied).
- Average length of stay was 9.7 nights - up 2.7 nights on the year end June 2024
- An average based on a two year time period has been used to provide an acceptable underlying sample to be used to support estimates for other LGAs
- The chart bottom left shows an annual average of 1.4 million nights in the 2 year period ending June 2025 this far in excess of four of the five comparison LGAs and well ahead of one (Coffs Harbour).
- The spend per night comparison in the two year period is shown in the chart bottom centre indicates the spend per night is lower than two LGAs and higher than three.



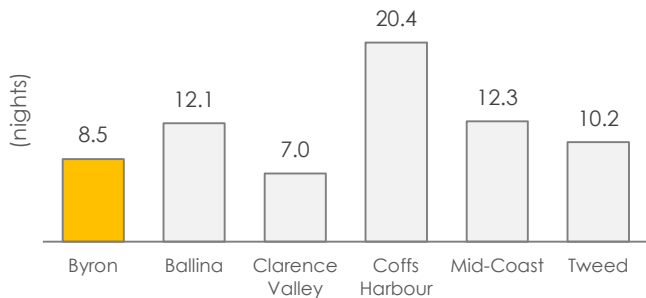
Avg. 2 yrs ending June 2025
Visitor Nights Comparison



Avg. 2 yrs ending June 2025
\$ per night comparison



Avg. 2 yrs ending June 2025
Avg. LOS Comparison



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