THE TWEED TOURISM CO.

MARKETING INTELLIGENCE UPDATE

YEAR ENDING MARCH 2023

Please note:

Statistics have been prepared by the region's peak body, The Tweed Tourism Company (1800 674 414).

DOMESTIC VISITORS
YEAR ENDING MARCH 23

	OVERNIGHT VISITORS			VISITOR NIGHTS			ALOS*
	YE Mar 22	**YE Mar 23**	**Change %**	**YE Mar 22**	**YE Mar 23**	**Change %**	
The Tweed	494,000	664,000	34.4%	2,097,000	2,237,000	6.7%	3.4
North Coast	4,181,000	5,623,000	34.5%	17,648,000	20,846,000	18.1%	3.7

DOMESTIC DAYTRIPS
YEAR ENDING MARCH 23

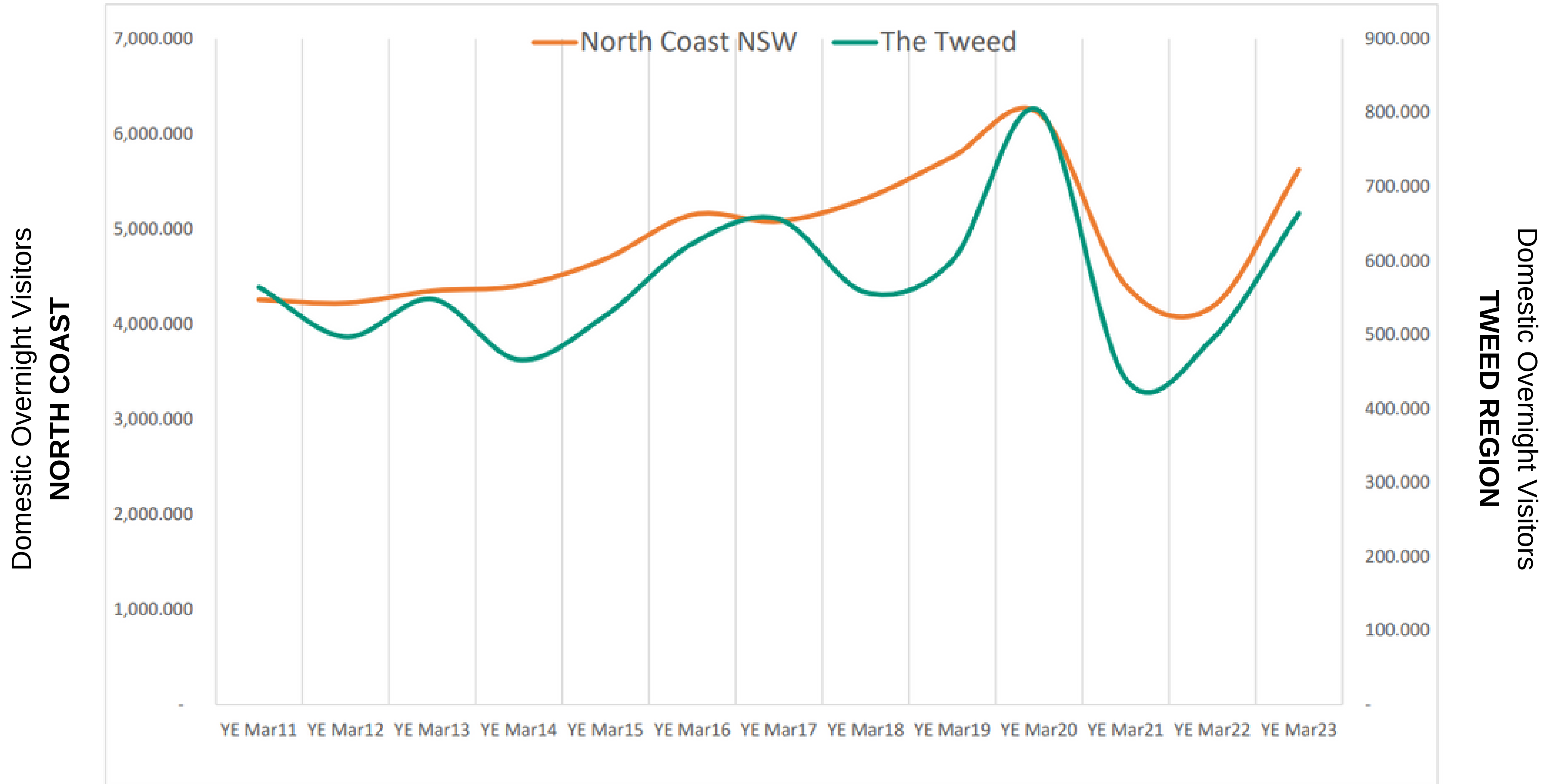
	YE Mar 22	YE Mar 23	Change %
The Tweed	803,000	1,103,000	37.4%
North Coast	4,904,000	6,164,000	25.7%

INTERNATIONAL VISITORS
YEAR ENDING MARCH 23

	OVERNIGHT VISITORS			VISITOR NIGHTS			ALOS*
	YE Mar 22	**YE Mar 23**	**Change %**	**YE Mar 22**	**YE Mar 23**	**Change %**	
The Tweed	456	17,073	3644.1%	6,132	218,794	3468.1%	12.8
North Coast	6,190	172,176	2681.5%	67,888	2,042,730	2909%	11.9

Source: Tourism Research Australia, National Visitor Survey for the Year ended March 2023

TWEED REGION VS NORTH COAST TREND DATA:
DOMESTIC OVERNIGHT VISITORS



Source: Tourism Research Australia, National Visitor Survey for the Year ended March 2023

EXPENDITURE OVERVIEW YEAR ENDING MARCH 23

Expenditure Caveat
Some local government areas (inclusive of the Tweed) complete the modelling based on the Tourism Region (TR) expenditure applied to the visitation rate (as taken from TRA online). Whilst this methodology is the most effective available, it assumes that visitors have the same spending patterns universally. TRA refuses to make that assumption and as such this data is derived by the LGA and never published. Additionally, TRA also considers the expenditure data on a yearly basis as potentially volatile.

TTC recommends that the expenditure data can be a good way to demonstrate the importance of direct visitor expenditure for the local Tweed economy, noting that economic multipliers then mean this injection of new money spreads throughout the community. The data should be used with caution, in particular with large year-to-year fluctuations. A better method is to look at trend information and a gradual change in expenditure over a number of years which TTC will look to provide in upcoming reporting periods for added context.

TWEED

	DOMESTIC OVERNIGHT VISITORS		
	YE Mar 22	YE Mar 23	Change %
Total Expenditure ($M)	$306M	$447M	46.1%
Expenditure Per Visit	$656	$771	17.5%
Expenditure Per Night	$162	$206	27.2%

	DOMESTIC DAYTRIP VISITORS		
	YE Mar 22	YE Mar 23	Change %
Total Expenditure ($M)	$89M	$123M	38.2%
Expenditure Per Visit	$120	$129	7.5%

	ALL VISITORS		
	YE Mar 22	YE Mar 23	Change %
Total Expenditure ($M)	$395M	$570M	44.3%

NORTH COAST

	DOMESTIC OVERNIGHT VISITORS		
	YE Mar 22	YE Mar 23	Change %
Total Expenditure ($B)	$3.257B	$4.921B	51.1%
Expenditure Per Visit	$779	$875	12.3%
Expenditure Per Night	$185	$236	27.6%

	DOMESTIC DAYTRIP VISITORS		
	YE Mar 22	YE Mar 23	Change %
Total Expenditure ($M)	$646M	$960M	48.6%
Expenditure Per Visit	$132	$156	18.2%

	ALL VISITORS		
	YE Mar 22	YE Mar 23	Change %
Total Expenditure ($B)	$3.903B	$5.881B	50.7%

Source: Tourism Research Australia, National Visitor Survey for the Year ended March 2023.

COMPETITOR ANALYSIS - NEIGHBOURS

		OVERNIGHT VISITORS			VISITOR NIGHTS			ALOS*
		YE Mar 22	YE Mar 23	Change %	YE Mar 22	YE Mar 23	Change %	
LOCAL	North Coast	4,181,000	5,623,000	34.5%	17,648,000	20,846,000	18.1%	3.7
	The Tweed	494,000	664,000	34.4%	2,097,00	2,237,000	6.7%	3.4
Neighbouring LGAs (Northern Rivers)	Byron Region	536,000	710,000	32.5%	2,172,000	2,391,000	10.1%	3.4
	Ballina	296,000	286,000	-3.4%	946,000	971,000	2.6%	3.4
	Clarence Valley	363,000	613,000	68.9%	1,233,00	1,980,000	60.6%	3.2
	Richmond Valley	122,000	136,000	11.5%	245,000	477,000	94.7%	3.6
Neighbouring LGAs (South East QLD)	Gold Coast	3,264,000	4,222,000	29.4%	12,075,000	15,413,000	27.6%	3.7
	Sunshine Coast	3,708,000	4,125,000	11.2%	13,255,000	14,382,000	8.5%	3.5

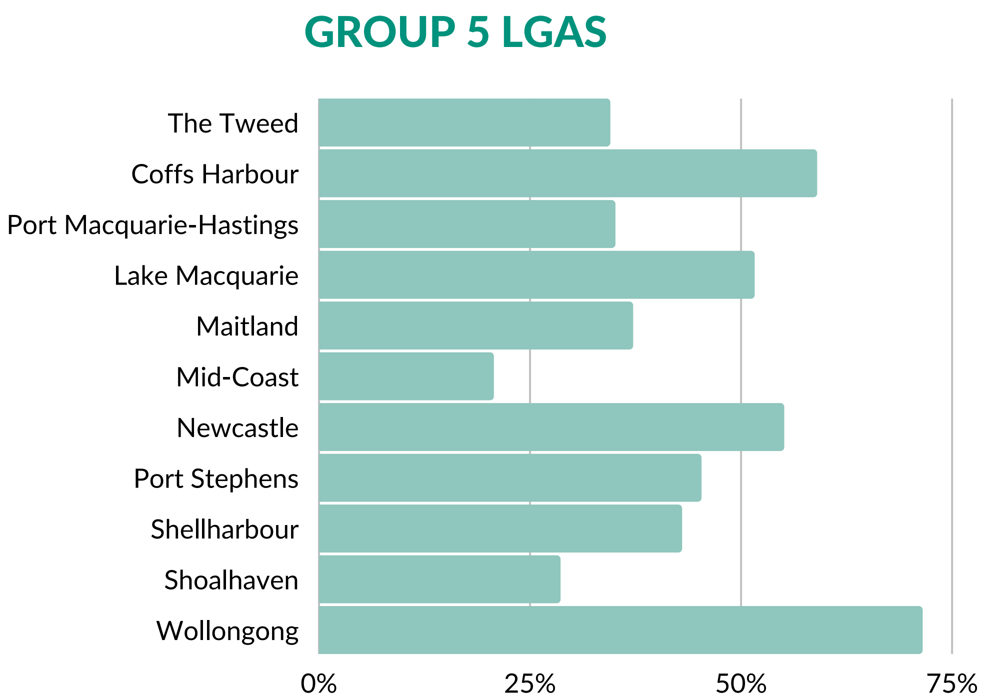
Source: Tourism Research Australia, National Visitor Survey for the Year ended March 2023.

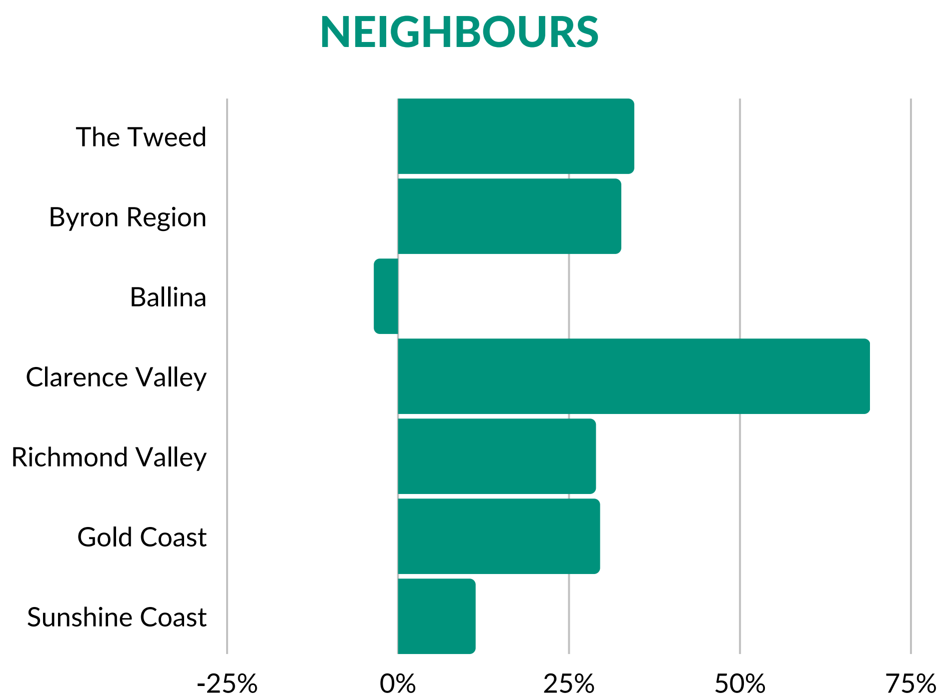
COMPETITOR ANALYSIS - GROUP 5 LGAs

		OVERNIGHT VISITORS			VISITOR NIGHTS			ALOS*
		YE Mar 22	YE Mar 23	Change %	YE Mar 22	YE Mar 23	Change %	
LOCAL	North Coast	4,181,000	5,623,000	34.5%	17,648,000	20,846,000	18.1%	3.7
	The Tweed	494,000	664,000	34.4%	2,097,000	2,237,000	6.7%	3.4
Group 5 LGAs	Coffs Harbour	596,000	947,000	58.9%	2,426,000	3,086,000	27.2%	3.3
	Port Macquarie-Hastings	614,000	829,000	35.0%	2,045,000	2,593,000	26.8%	3.1
	Lake Macquarie	266,000	403,000	51.5%	811,000	1,105,000	36.3%	2.7
	Maitland	143,000	196,000	37.1%	383,000	469,000	22.5%	2.4
	Mid-Coast	964,000	1,163,00	20.6%	3,168,000	3,895,000	22.9%	3.3
	Newcastle	1,024,000	1,578,000	55.0%	2,805,000	3,786,000	35.0%	2.4
	Port Stephens	598,000	868,000	45.2%	2,057,000	2,650,000	28.8%	3.1
	Shellhabour	119,000	170,000	42.9%	298,000	516,000	73.2%	3.0
	Shoalhaven	1,427,000	1,833,000	28.5%	5,192,000	5,799,000	11.7%	3.2
	Wollongong	581,000	996,000	71.4%	1,383,000	2,408,000	74.1%	2.4

Source: Tourism Research Australia, National Visitor Survey for the Year ended March 2023.

% CHANGE ON DOMESTIC OVERNIGHT VISITORS (YEAR ON YEAR)





Source: Tourism Research Australia, National Visitor Survey for the Year ended March 2023.