

BYRON SHIRE TOURISM MONITOR

Monitoring Byron Local Government Area's Visitor Volume and Market Share

Year ending December 2023

An independent report using official tourism data prepared each quarter for Byron Shire Council by Peter Valerio; Tourism Strategy Development Services.



PREPARED BY PETER VALERIO
ANALYSING THE TOURISM MARKET SINCE 1990
TOURISM STRATEGY
DEVELOPMENT SERVICES

OVERVIEW FOR THE YEAR ENDING DECEMBER 2023

TOTAL VISITORS: 1.62 million

UP 8% on YE December 2022

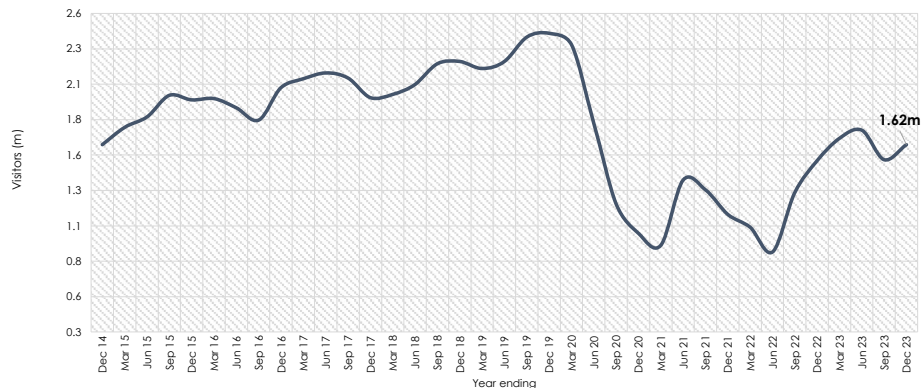
TOTAL NIGHTS: 3.71 million

UP 27% on YE December 2022

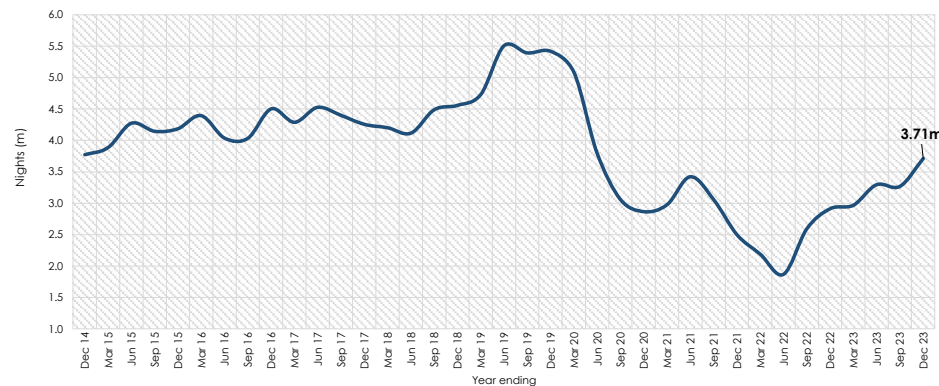
TOTAL SPEND: \$770 million*

\$21m higher than YE December 2022

Total Visitors



Total Nights



DOMESTIC OVERNIGHT VISITORS

- 746,000; 5% up on year ending December 2022 (not a statistically significant change)
- Estimated total spend \$620 million

DOMESTIC VISITOR NIGHTS

- 2.51 million; 4% down on year ending December 2022 (not a statistically significant change).
- Average length of stay 3.4 nights.

DOMESTIC DAY VISITORS

- 729,000; 1% down on year ending December 2022 (not a statistically significant change)
- Estimated spend \$74 million.

INTERNATIONAL OVERNIGHT VISITORS

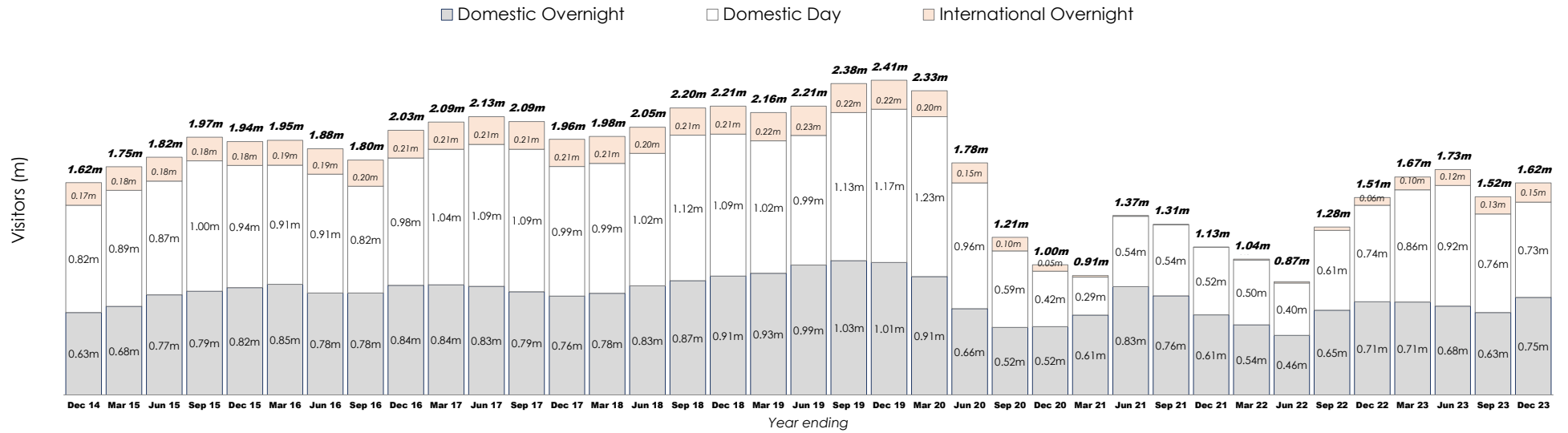
- 149,000; No year-on-year percentage change available.
- Estimated spend \$76 million

INTERNATIONAL VISITOR NIGHTS

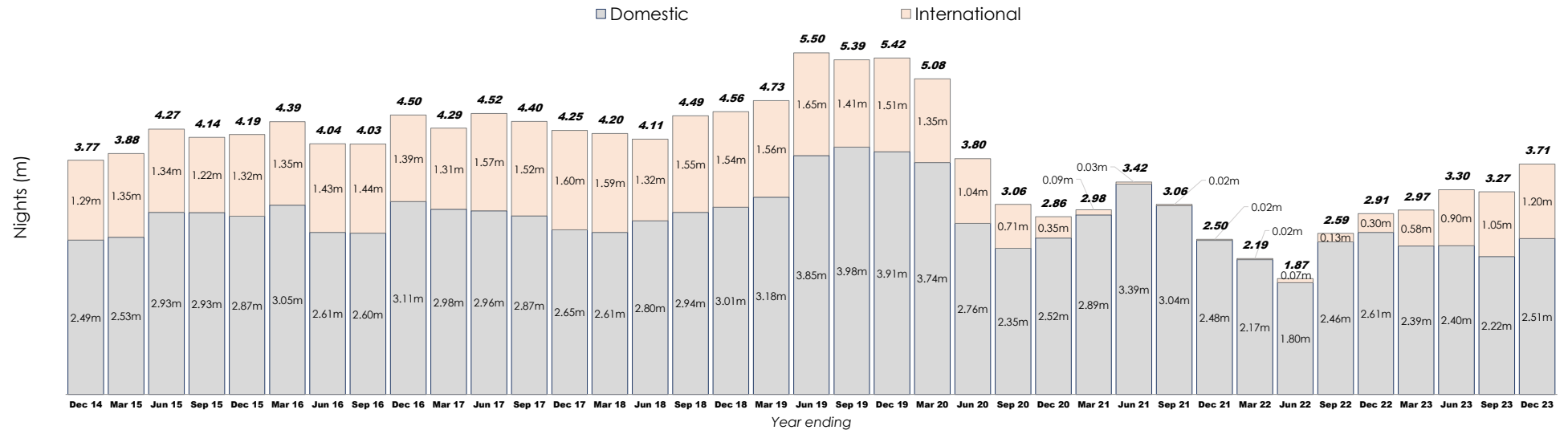
- 1.20 million; No year-on-year percentage change available.
- Average length of stay 8.0 nights

*see assumptions related to this estimate on pages 4, 5 & 6.
Prepared by Peter Valerio. Copywrite remains with Tourism Research Australia & Commonwealth of Australia. Acknowledgements required. Data cannot be sold.

Visitor Breakdown



Visitor Nights Breakdown

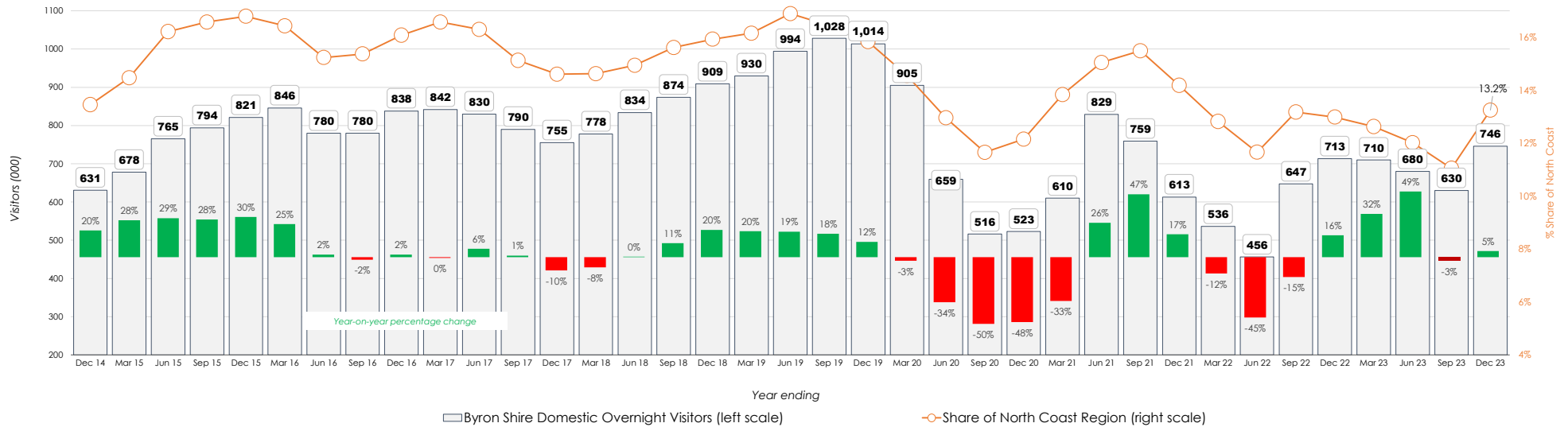


DOMESTIC OVERNIGHT VISITORS

Year ending >	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16	Mar 17	Jun 17	Sep 17	Dec 17	Mar 18	Jun 18	Sep 18	Dec 18	Mar 19	Jun 19	Sep 19	Dec 19	Mar 20	Jun 20	Sep 20	Dec 20	Mar 21	Jun 21	Sep 21	Dec 21	Mar 22	Jun 22	Sep 22	Dec 22	Mar 23	Jun 23	Sep 23	Dec 23
Byron Shire (000)	631	678	765	794	821	846	780	780	838	842	830	790	755	778	834	874	909	930	994	1,028	1,014	905	659	516	523	610	829	759	613	536	456	647	713	710	680	630	746
Change vs same period previous year (%)*	20%	28%	29%	28%	30%	25%	2%	-2%	2%	0%	6%	1%	-10%	-8%	0%	11%	20%	20%	19%	18%	12%	-3%	-34%	-50%	-48%	-33%	26%	47%	17%	-12%	-45%	-15%	16%	32%	49%	6%	5%
North Coast Tourism Region (000)	4,691	4,686	4,718	4,791	4,888	5,149	5,119	5,075	5,211	5,080	5,093	5,222	5,170	5,319	5,582	5,598	5,707	5,757	5,884	6,253	6,402	6,217	5,087	4,428	4,305	4,410	5,510	4,899	4,322	4,181	3,911	4,911	5,490	5,623	5,658	5,700	5,632
Change vs same period previous year (%)	9%	6%	2%	4%	4%	10%	8%	6%	7%	-1%	-1%	3%	-1%	5%	10%	7%	10%	8%	5%	12%	12%	8%	-14%	-29%	-33%	-29%	8%	11%	0%	-5%	-29%	0%	27%	34%	45%	16%	3%
Byron share of North Coast Region (%)	13.5%	14.5%	16.2%	16.6%	16.8%	16.4%	15.2%	15.4%	16.1%	16.6%	16.3%	15.1%	14.6%	14.6%	14.9%	15.6%	15.9%	16.2%	16.9%	16.4%	15.8%	14.6%	13.0%	11.7%	12.1%	13.8%	15.0%	15.5%	14.2%	12.8%	11.7%	13.2%	13.0%	12.6%	12.0%	11.1%	13.2%
Share shift vs same period previous year (%)	1.2%	2.4%	3.4%	3.2%	3.3%	2.0%	-1.0%	-1.2%	-0.7%	0.1%	1.1%	-0.2%	-1.5%	-1.9%	-1.4%	0.5%	1.3%	1.5%	2.0%	0.8%	-0.1%	-1.6%	-3.9%	-4.8%	-3.7%	-0.7%	2.1%	3.8%	2.0%	-1.0%	-3.4%	-2.3%	-1.2%	-0.2%	0.4%	-2.1%	0.3%

* Refer Key Points for Statistical Significance test results. Above average for Byron Shire

Byron Shire Domestic Overnight Visitors (000) | Year-on-year percentage change | Share of North Coast Region



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

VISITORS & SHARE AT A GLANCE

Byron Shire Visitors (000): 746
Year-on-year change (%) 5%

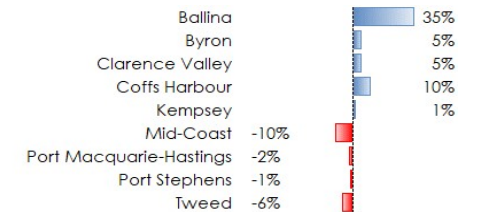
North Coast Region Visitors (000): 5,632
Year-on-year change (%) 3%

Byron Shire share of North Coast (%): 13.2%
Share shift (vs same period previous year) 0.3%

KEY POINTS FOR YEAR END DECEMBER 2023

- An estimated 746,000 domestic overnight visitors spent at least one night in the Byron Shire in the year ending December 2023.
- This visitor volume was 5% higher than the year ending December 2022 (caution - not statistically significant) and the highest for a 12 month period since the year ending September 2021.
- That noted, the year end December 2023 was still 26% below the same year ending period in 2019.
- Byron Shire's year-on-year (YOY) movement was - on paper at least - equal to or favourable compared to all comparison LGA's apart from two (see chart to right). It was also favourable compared to the North Coast Region (+3% YOY).
- Byron Shire's share of the North Coast Region improved to 13.2% but remains below average.
- Noting the smaller sample size associated with quarterly data and the higher sample error, there were an estimated 260,000 domestic overnight visitors in the December '23 quarter. This was 81% higher than the December '22 quarter and 20% higher than the December quarter in 2019. This bodes well for the recovery of domestic overnight tourism.

LGA COMPARISONS*



EXPENDITURE ESTIMATE: \$620 million

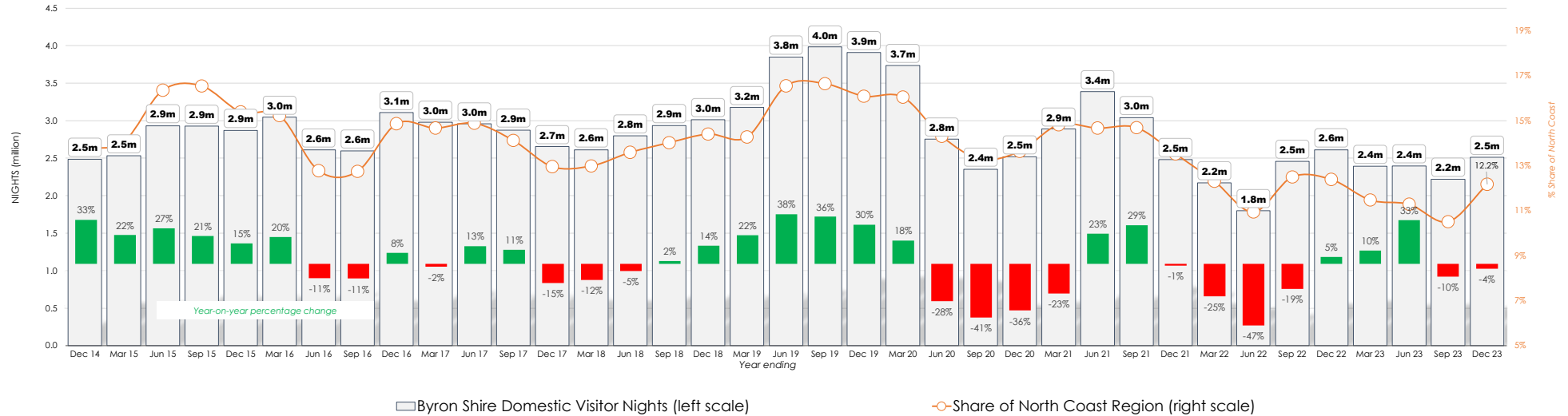
If it is assumed visitor expenditure was the same as the average over the two years ending December 2021 (\$247 per night) domestic overnight visitors spent \$620 million in the Byron Shire in the year ending December 2023.

DOMESTIC VISITOR NIGHTS

Year ending >	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16	Mar 17	Jun 17	Sep 17	Dec 17	Mar 18	Jun 18	Sep 18	Dec 18	Mar 19	Jun 19	Sep 19	Dec 19	Mar 20	Jun 20	Sep 20	Dec 20	Mar 21	Jun 21	Sep 21	Dec 21	Mar 22	Jun 22	Sep 22	Dec 22	Mar 23	Jun 23	Sep 23	Dec 23
Byron Shire (million)	2.49	2.53	2.93	2.93	2.87	3.05	2.61	2.60	3.11	2.98	2.96	2.87	2.65	2.61	2.80	2.94	3.01	3.18	3.85	3.98	3.91	3.74	2.76	2.35	2.52	2.89	3.39	3.04	2.48	2.17	1.80	2.46	2.61	2.39	2.40	2.22	2.51
Change vs same period previous year (%)*	33%	22%	27%	21%	15%	20%	-11%	-11%	8%	-2%	13%	11%	-15%	-12%	-5%	2%	14%	22%	38%	36%	30%	18%	-28%	-41%	-36%	-23%	23%	29%	-1%	-25%	-47%	-19%	5%	10%	33%	-10%	-4%
North Coast Tourism Region (million)	18.1	18.0	17.9	17.7	18.7	20.0	20.4	20.4	20.9	20.3	19.9	20.4	20.5	20.1	20.6	20.9	20.9	22.2	23.3	23.9	24.3	23.3	19.3	17.7	18.5	19.5	23.1	20.7	18.4	17.6	16.4	19.7	21.1	20.8	21.2	21.1	20.6
Change vs same period previous year (%)	3%	1%	-4%	-8%	3%	11%	14%	15%	12%	1%	-3%	0%	-2%	-1%	4%	3%	2%	11%	13%	14%	16%	5%	-17%	-26%	-24%	-16%	20%	17%	-1%	-10%	-29%	-5%	15%	18%	29%	7%	-2%
Byron share of North Coast Region (%)	13.8%	14.1%	16.3%	16.5%	15.4%	15.2%	12.8%	12.7%	14.9%	14.7%	14.9%	14.1%	13.0%	13.0%	13.6%	14.0%	14.4%	14.3%	16.5%	16.6%	16.1%	16.0%	14.3%	13.3%	13.6%	14.8%	14.7%	14.7%	13.5%	12.3%	10.9%	12.5%	12.4%	11.5%	11.3%	10.5%	12.2%
Share shift vs same period previous year (%)	3.2%	2.4%	4.0%	3.9%	1.6%	1.2%	-3.6%	-3.8%	-0.5%	-0.5%	2.1%	1.4%	-1.9%	-1.7%	-1.3%	-0.1%	1.4%	1.3%	3.0%	2.6%	1.7%	1.8%	-2.2%	-3.4%	-2.5%	-1.2%	0.4%	1.4%	-0.1%	-2.5%	-3.7%	-2.2%	-1.1%	-0.8%	0.3%	-2.0%	-0.2%

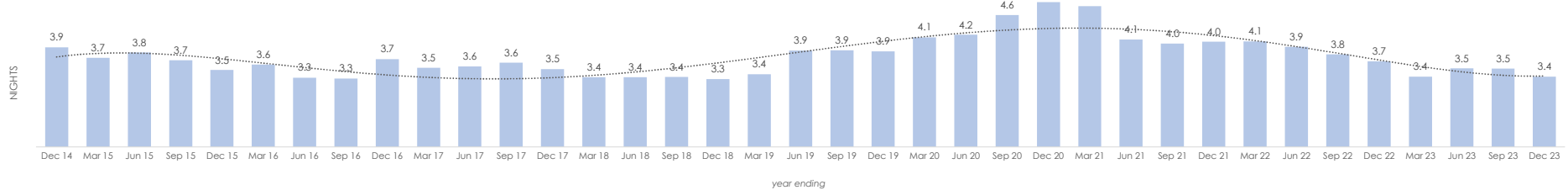
* Refer Key Points for Statistical Significance test results. Above average for Byron Shire

Byron Shire Domestic Visitor Nights (m) | Year-on-year percentage change | Share of North Coast Region



Source: Data extracted from Tourism Research Australia's National Visitor Survey dataset. All data, the differences between data points and percentage share calculations are subject to sample survey error.

Average nights per visit



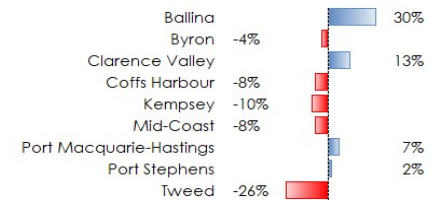
VISITORS & SHARE AT A GLANCE

Byron Shire Visitor Nights (m)	2.51
Year-on-year change (%)	-4%
North Coast Region Visitors (m)	20.6
Year-on-year change (%)	-2%
Byron Shire share of North Coast (%)	12.2%
Share shift (vs same period previous year)	-0.2%

KEY POINTS FOR YEAR END DECEMBER 2023

- Domestic overnight visitors spent an estimated 2.5 million nights Byron Shire in the year ending December 2023 at an average of 3.4 nights per visit.
- This visitor nights volume was 4% lower than the year ending December 2022. This was not a statistically significant change (note - this does not rule out a decrease).
- That limitation noted, Byron Shire's percentage change was similar but unfavourable compared to the North Coast Region (-2%) but favourable compared to four LGAs in the comparison set (see chart to right).
- Byron Shire's share of the Northern Rivers region was similar to 2022 and slightly up on the year end September 2023. This is the first share increase since the year ending September 2022 but that noted share remains below average.
- The sample size in the latest quarter is small but acceptable. Recognising the higher sample error that comes with this estimate, visitors spent an estimated 780,000 nights in the Byron Shire in the December '23 quarter - 60% higher than the December '22 quarter and 7% higher than the December quarter in 2019.

LGA COMPARISONS*



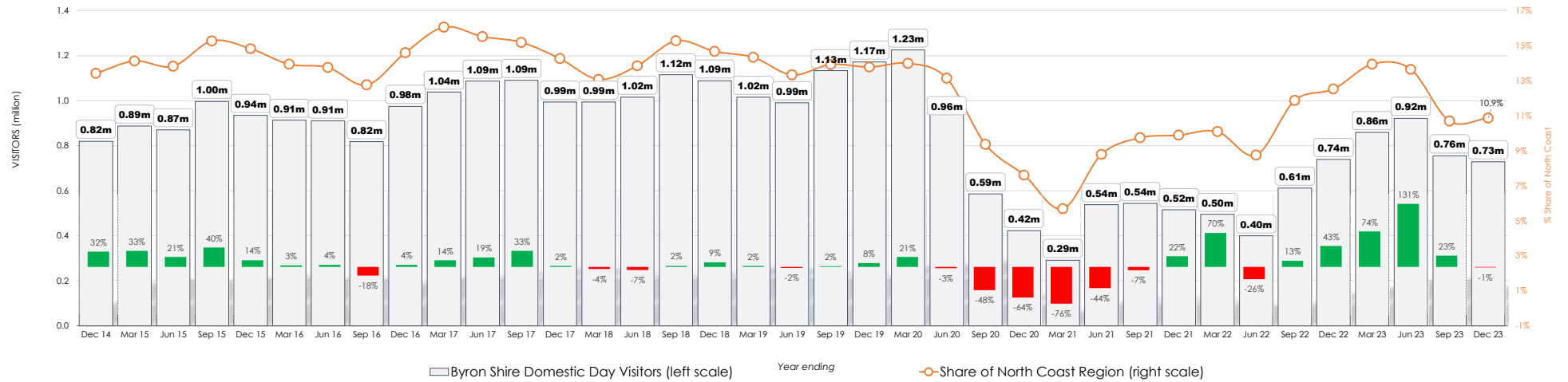
* Subject to statistical significance testing

DOMESTIC DAY VISITORS

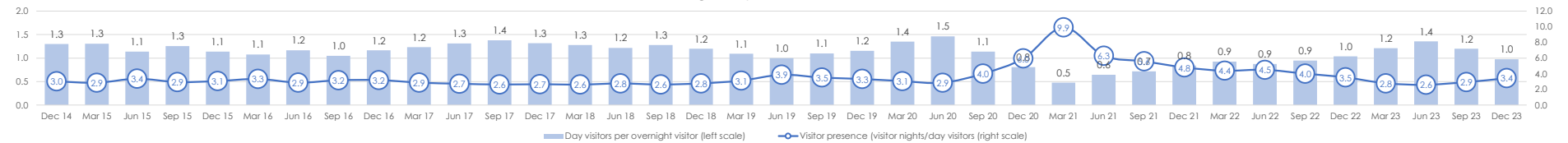
Year ending >	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16	Mar 17	Jun 17	Sep 17	Dec 17	Mar 18	Jun 18	Sep 18	Dec 18	Mar 19	Jun 19	Sep 19	Dec 19	Mar 20	Jun 20	Sep 20	Dec 20	Mar 21	Jun 21	Sep 21	Dec 21	Mar 22	Jun 22	Sep 22	Dec 22	Mar 23	Jun 23	Sep 23	Dec 23		
Byron Shire (million)	0.82	0.89	0.87	1.00	0.94	0.91	0.91	0.82	0.98	1.04	1.09	1.09	0.99	0.99	1.02	1.12	1.09	1.02	0.99	1.13	1.17	1.23	0.964	0.586	0.423	0.291	0.538	0.544	0.516	0.495	0.400	0.612	0.739	0.859	0.922	0.755	0.729		
Change vs same period previous year (%)*	32%	33%	21%	40%	14%	3%	4%	-18%	4%	14%	19%	33%	2%	-4%	-7%	2%	9%	2%	-2%	8%	21%	8%	21%	-3%	-48%	-64%	-56%	-76%	-44%	-7%	22%	70%	-26%	13%	43%	74%	131%	23%	-1%
North Coast Tourism Region (million)	6.11	6.28	6.30	6.53	6.31	6.55	6.62	6.41	6.68	6.47	7.01	7.18	6.97	7.60	7.33	7.30	7.42	7.08	7.43	8.14	8.51	8.75	7.34	6.26	5.56	5.12	6.12	5.59	5.22	4.90	4.57	5.16	5.90	6.16	6.76	7.06	6.71		
Change vs same period previous year (%)	11%	16%	13%	13%	3%	4%	5%	-2%	6%	-1%	6%	12%	4%	18%	5%	2%	6%	-7%	1%	12%	15%	24%	-1%	-23%	-35%	-42%	-17%	-11%	-6%	-4%	-25%	-8%	13%	26%	48%	37%	14%		
Byron share of North Coast Region (%)	13.4%	14.1%	13.8%	15.3%	14.8%	13.9%	13.8%	12.8%	14.6%	16.1%	15.5%	15.2%	14.3%	13.1%	13.8%	15.3%	14.7%	14.3%	13.3%	13.9%	13.8%	14.0%	13.1%	9.4%	7.6%	5.7%	8.8%	9.7%	9.9%	10.1%	8.7%	11.9%	12.5%	13.9%	13.6%	10.7%	10.9%		
Share shift vs same period previous year (%)	2.1%	1.9%	0.8%	2.9%	1.4%	-0.2%	-0.1%	-2.5%	-0.2%	2.1%	1.8%	2.4%	-0.3%	-3.0%	-1.7%	0.1%	0.4%	1.3%	-0.5%	-1.4%	-0.9%	-0.3%	-0.2%	-4.6%	-6.2%	-8.3%	-4.3%	0.4%	2.3%	4.4%	0.0%	2.1%	2.6%	3.8%	4.9%	-1.2%	-1.7%		

* Refer Key Points for Statistical Significance test results. Above average for Byron Shire

Byron Shire Domestic Day Visitors | Year-on-Year Percentage Change | Share of North Coast Region



Overnight/Day Visitor Mix & Presence



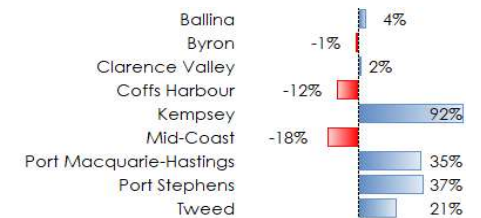
VISITORS & SHARE AT A GLANCE

Byron Shire Visitors (m)	0.729
Year-on-year change (%)	-1%
North Coast Region Visitors (m)	6.71
Year-on-year change (%)	14%
Byron Shire share of North Coast (%)	10.9%
Share shift (vs same period previous year)	-1.7%

KEY POINTS FOR YEAR END DECEMBER 2023

- The Byron Shire hosted an estimated 730,000 day visitors in the year end December '23
- This was 1% lower than the year ending December '22 but this is far from a statistically significant change and would best be described as "virtually identical to 2022".
- The latest year end estimate was 443,000 (38%) less than the pre-Covid year ending December 2019.
- Byron Shire's YOY percentage change of -1% was unfavourable compared to the North Coast region as a whole (+14%) and all but two of the comparison LGAs (see chart to right).
- Market share of the North Coast region remained below average at 10.9% and is clearly lower than all pre-Covid share estimates.
- Day visitors and overnight visitor numbers were close to equal in the latest period and domestic visitor presence was 3.4 in favour of overnight visitors (i.e. given the number of nights overnight visitors spent in the Shire compared to the number of day visitors you would be 3.4 times more likely to have seen a domestic overnight visitor than a domestic day visitor during

LGA COMPARISONS*



EXPENDITURE ESTIMATE: \$74 million

If it is assumed visitor expenditure was the same as the average over the two years ending December 2021 (\$101 per visit) domestic overnight visitors spent \$74 million in the Byron Shire in the year ending December 2023.

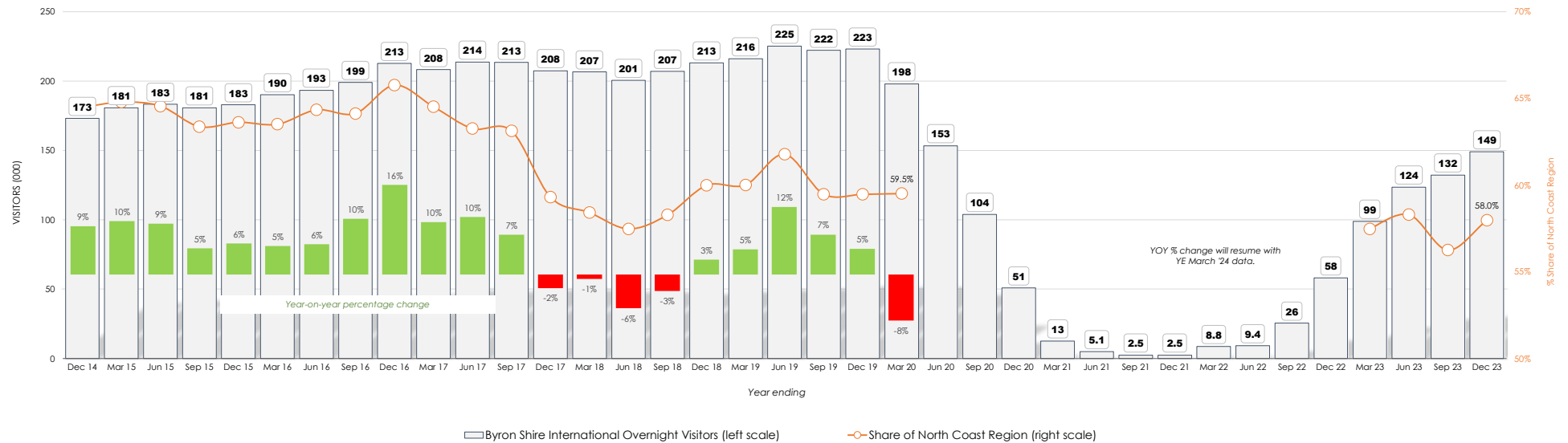
INTERNATIONAL OVERNIGHT VISITORS

IMPORTANT NOTE: For year end periods March 2020 until December 2021 the following assumptions have been applied: YEAR END JUNE 20: 75% of the year end March 2020 estimate + 10% of the 25% excluded from this period; YEAR END SEPTEMBER 20: 50% of the year end March 2020 estimate + 5% of the 50% excluded from this period; YEAR END DECEMBER 20: 25% of the year end March 2020 estimate + 1% of the 75% excluded from this period; YEAR END MARCH 2021: 25% of the year end December 2020 estimate; YEAR END JUNE 2021: 10% of the year end December 2020 estimate; YEAR END SEPTEMBER & DECEMBER 2021: 5% of the year end December 2020 estimate. For the year end March 2022 until YE December 22, estimates are based on a combination of IVS survey results and overall arrivals data.

Year ending >	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16	Mar 17	Jun 17	Sep 17	Dec 17	Mar 18	Jun 18	Sep 18	Dec 18	Mar 19	Jun 19	Sep 19	Dec 19	Mar 20	Jun 20	Sep 20	Dec 20	Mar 21	Jun 21	Sep 21	Dec 21	Mar 22	Jun 22	Sep 22	Dec 22	Mar 23	Jun 23	Sep 23	Dec 23	
Byron Shire (000)	173	181	183	181	183	190	193	199	213	208	214	213	208	207	201	207	213	216	225	222	223	198	153	104	51	13	5.1	2.5	2.5	8.8	9.4	26	58	99	124	132	149	
Change vs same period previous year (%)*	9%	10%	9%	5%	6%	5%	6%	10%	16%	10%	10%	7%	-2%	-1%	-6%	-3%	3%	5%	12%	7%	5%	-8%																
North Coast Tourism Region (000)	268	279	284	285	287	299	301	310	324	323	338	338	350	354	349	355	355	360	364	373	375	333	258	175	86	21	8.6	4.3	4.3	14	19	48	107	172	212	235	257	
Change vs same period previous year (%)	4%	6%	7%	7%	7%	7%	6%	9%	13%	8%	12%	9%	8%	10%	3%	5%	2%	2%	4%	5%	6%	-8%																
Byron share of North Coast Region (%)	64.5%	64.8%	64.6%	63.4%	63.6%	63.5%	64.3%	64.1%	65.8%	64.5%	63.3%	63.1%	59.3%	58.4%	57.5%	58.3%	60.0%	60.0%	61.8%	59.5%	59.5%	59.5%													57.5%	58.3%	56.3%	58.0%
Share shift vs same period previous year (%)	2.6%	2.3%	1.1%	-1.3%	-0.9%	-1.3%	-0.2%	0.8%	2.1%	1.0%	-1.1%	-1.0%	-6.5%	-6.1%	-5.8%	-4.8%	0.7%	1.6%	4.3%	1.2%	-0.5%	-0.5%																

* Refer Key Points for Statistical Significance test results. Above average for Byron Shire

Byron Shire International Overnight Visitors |Year-on-Year Percentage Change | Share of North Coast Region

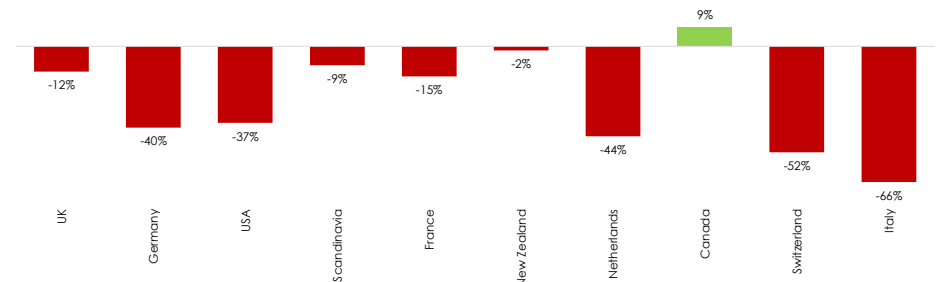


Source: Data-extracted from Tourism Research Australia's International Visitor Survey dataset. All data, the differences between data points, and percentage share calculations are subject to sample survey error.

KEY POINTS FOR YEAR END DECEMBER 2023

- An estimated 149,000 international visitors spent at least one night in the Byron Shire in the year ending December 2023
- This is 69% of the visitor volume in the year ending December 2019 - very similar to the North Coast Region.
- Year-on-year percentage change calculations will return with the year end March 2024 report.
- Estimated market share of the North Coast Region in the latest year ending period was 58% which is close to share in the year end December 2019.
- The chart to the right shows the visitor volume from the top 10 international visitor markets (as per the year end December 2019) compared to the year end December 2023.
- Only one market (Canada) exceeds 2019; New Zealand is almost equal and the UK, Scandinavia and France are nearing 2019. All other markets in the 2019 top 10 are between 37% and 66% below 2019.

2023 vs 2019 - Top 10 Markets (2019) - Overnight Visitors to Byron Shire



If it is assumed visitor expenditure was the same as the average over the two years ending December 2021 (\$510 per visitor) domestic overnight visitors spent **\$76 million** in the Byron Shire in the year ending December 2023.

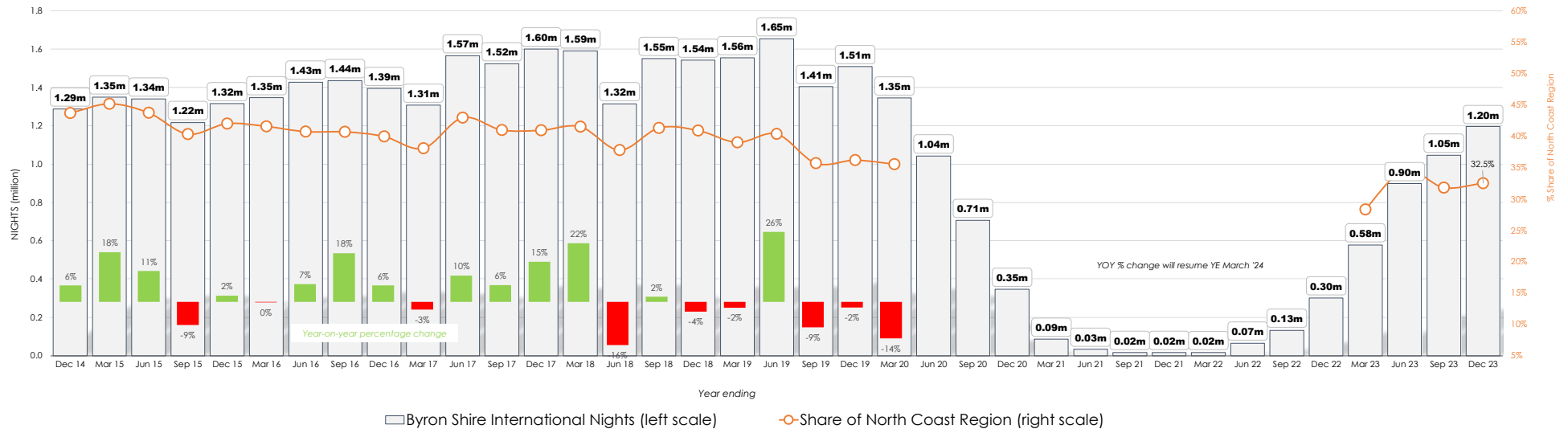
INTERNATIONAL VISITOR NIGHTS

IMPORTANT NOTE: For year end periods March 2020 until December 2021 the following assumptions have been applied: YEAR END JUNE 20: 75% of the year end March 2020 estimate + 10% of the 25% excluded from this period; YEAR END SEPTEMBER 20: 50% of the year end March 2020 estimate + 5% of the 50% excluded from this period; YEAR END DECEMBER 20: 25% of the year end March 2020 estimate + 1% of the 75% excluded from this period; YEAR END MARCH 2021: 25% of the year end December 2020 estimate; YEAR END JUNE 2021: 10% of the year end December 2020 estimate; YEAR END SEPTEMBER & DECEMBER 2021: 5% of the year end December 2020 estimate. For the year end March 2022 until YE December 2022, estimates are based on a combination of IVS survey results and overall arrivals data.

Year ending	Dec 14	Mar 15	Jun 15	Sep 15	Dec 15	Mar 16	Jun 16	Sep 16	Dec 16	Mar 17	Jun 17	Sep 17	Dec 17	Mar 18	Jun 18	Sep 18	Dec 18	Mar 19	Jun 19	Sep 19	Dec 19	Mar 20	Jun 20	Sep 20	Dec 20	Mar 21	Jun 21	Sep 21	Dec 21	Mar 22	Jun 22	Sep 22	Dec 22	Mar 23	Jun 23	Sep 23	Dec 23	
Byron Shire (million)	1.29	1.35	1.34	1.22	1.32	1.35	1.43	1.44	1.39	1.31	1.57	1.52	1.60	1.59	1.32	1.55	1.54	1.56	1.65	1.41	1.51	1.35	1.04	0.71	0.35	0.09	0.03	0.02	0.02	0.02	0.07	0.13	0.30	0.58	0.90	1.05	1.20	
Change vs same period previous year (%)*	6%	18%	11%	-9%	2%	0%	7%	18%	6%	-3%	10%	6%	15%	22%	-16%	2%	-4%	-2%	26%	-9%	-2%	-14%																
North Coast Tourism Region (million)	2.95	2.99	3.06	3.02	3.13	3.24	3.51	3.43	3.64	3.49	3.43	3.64	3.72	3.91	3.83	3.48	3.76	3.77	3.99	4.10	3.93	4.17	3.79	2.93	1.99	0.97	0.24	0.10	0.05	0.05	0.07	0.54	0.71	1.08	2.04	2.59	3.29	3.68
Byron share of North Coast Region (%)	43.7%	45.2%	43.8%	40.3%	42.0%	41.6%	40.7%	40.7%	40.0%	38.1%	43.0%	41.0%	41.0%	41.5%	37.8%	41.3%	40.9%	39.0%	40.4%	35.7%	36.2%	35.5%																
Share shift vs same period previous year (%)	2.4%	5.6%	2.5%	-3.5%	-1.7%	-3.6%	-3.0%	0.4%	-2.1%	-3.5%	2.2%	0.3%	1.0%	3.4%	-5.2%	0.3%	0.0%	-2.5%	2.6%	-5.6%	-4.7%	-3.5%																

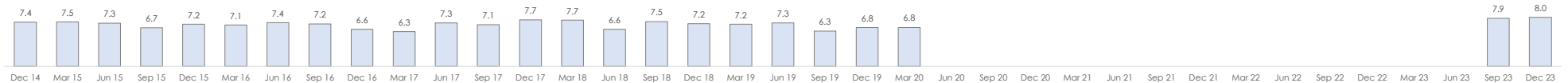
* Refer Key Points for Statistical Significance test results. Above average for Byron Shire

Byron Shire International Visitor Nights | Year-on-Year Percentage Change | Share of North Coast Region



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

Average nights per visit



KEY POINTS FOR YEAR END DECEMBER 2023

- International visitors spent an estimated 1.20m nights were spent in the Byron Shire in the year ending December 2023.
- Year-on-year percentage change calculations will recommence in the year ending March 2024 monitor.
- The latest estimate is around 80% of the visitor nights in the year ending December 2019. The North Coast is a little higher than this at 88%.
- Average length of stay was 8 nights - slightly longer than the pre-Covid average for a calendar year (7.2)
- Estimated market share of the North Coast Region in the latest year ending period was 32.5% which is around 4 percentage points below the market share of 2023.
- The chart to the right shows the difference between visitor nights in the latest period vs the same period in 2019 for the top 10 markets (as per 2019). Two markets have done better than recover and one has all but recovered. Another three markets are on track to recover and three markets are a long way from recovering.
- The reason behind the figures of Germany and France are a much longer average length of stay in 2023 compared to 2019. The average length of stay for German visitors has trebled and for French visitors it has almost doubled.

2023 vs 2019 - Top 10 Markets (2019) - Visitor Nights spent in Byron Shire

