Overview

NSW received nearly 25.3 million international (1) and domestic (2) nature based visitors - up by 10.5% on YE Dec 14. Visitors spent nearly 115.9 million nights in the State - up by 8.6% on YE Dec 14.

Nature based visitors spent an estimated $16.8 billion (3) (incl package expenditure by overseas visitors) in NSW - up by 13.1% on YE Dec 14.

(1) Source: International Visitor Survey, YE Dec 15, Tourism Research Australia.
(2) Source: National Visitor Survey, YE Dec 15, Tourism Research Australia.
(3) Total expenditure on the trip.

International Market (1)

The information in this section relates to international overnight visitors who engaged in nature based activity during their trip to Australia, but not necessarily in a particular State or region.

Visitors and nights

NSW received over 2.8 million international nature based visitors - up by 9.0%* on YE Dec 14. They spent almost 76.3 million nights in the State - up by 11.7%* on YE Dec 14.

Market share

Nature based travellers represented 82.9% of visitors and 89.0% of nights by all international travellers to NSW. Compared with YE Dec 14, the share of visitors was up by 1.8% pts and the share of nights was down by 0.9% pts.

The State received 52.4% of visitors and 34.1% of nights by nature based travellers in Australia. Compared with YE Dec 14, the share of visitors was down by 0.8% pts and the share of nights was down by 0.1% pt.

Type of nature based activity

<table>
<thead>
<tr>
<th>Rank</th>
<th>Nature based activity</th>
<th>Visitors ('000)</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Go to the beach</td>
<td>2,411</td>
<td>85.0%</td>
</tr>
<tr>
<td>2</td>
<td>Visit national parks or state parks</td>
<td>1,822</td>
<td>64.3%</td>
</tr>
<tr>
<td>3</td>
<td>Visit botanical or other public gardens</td>
<td>1,554</td>
<td>54.8%</td>
</tr>
<tr>
<td>4</td>
<td>Visit wildlife parks, zoos or aquariums</td>
<td>1,459</td>
<td>51.4%</td>
</tr>
<tr>
<td>5</td>
<td>Bushwalking or rainforest walks</td>
<td>1,006</td>
<td>35.5%</td>
</tr>
<tr>
<td>6</td>
<td>Visit farms</td>
<td>426</td>
<td>15.0%</td>
</tr>
<tr>
<td>7</td>
<td>Go whale or dolphin watching</td>
<td>385</td>
<td>13.6%</td>
</tr>
<tr>
<td>8</td>
<td>Visit the outback</td>
<td>301</td>
<td>10.6%</td>
</tr>
</tbody>
</table>

‘Go to the beach’ (85.0%) was the most popular nature based activity undertaken by international visitors who had been to NSW. ‘Visit national parks or State parks (64.3%) was the 2nd most popular.

Origin

Mainland China (18.3%) was the largest individual source market of international nature based visitors to NSW, followed by the United Kingdom (11.3%) and the USA (11.0%).

Mainland China (18.4%) was the biggest individual contributor of nights in the State, followed by the United Kingdom (10.7%) and South Korea (6.8%).

Average length of stay

International nature based visitors stayed an average of 26.9 nights in NSW. This was longer than the average for all visitors to the State (25.1 nights).

Visitors from Thailand (49.9 nights) had the longest average stay in NSW, followed by visitors from the Philippines (48.2 nights) and Italians (45.5 nights).

Seasonality

Over 3/10 (30.2%) of international nature based visitors who had been to NSW departed Australia in the December quarter. Over 3/10 (31.3%) of international nature based nights in NSW were spent by those who departed Australia in the March quarter.

Expenditure (incl 30% prepaid package expenditure)

International nature based visitors spent an estimated $7.8 billion (incl package expenditure) in NSW - up by 18.9%* on YE Dec 14. On average, visitors who had been to NSW spent $2,763 per visitor and $103 per night.

Accommodation in NSW

‘Rented house, apartment, flat or unit’ (44.1%) was the most popular accommodation type used for international nature based visitor nights in NSW. ‘Friends or relatives property’ (28.7%) was the 2nd most popular.

Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

(1) Source: International Visitor Survey, YE Dec 15, Tourism Research Australia (TRA).
(2) Source: National Visitor Survey, YE Dec 15, TRA.
International Market continued

Destinations in NSW

<table>
<thead>
<tr>
<th>Region</th>
<th>Visitors ('000)</th>
<th>%</th>
<th>Nights ('000)</th>
<th>%</th>
<th>Average stay (nights)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sydney</td>
<td>2,653</td>
<td>83.0%</td>
<td>64,014</td>
<td>89.1%</td>
<td>24.1</td>
</tr>
<tr>
<td>Blue Mountains</td>
<td>100</td>
<td>97.7%</td>
<td>528</td>
<td>98.1%</td>
<td>5.3</td>
</tr>
<tr>
<td>Capital Country</td>
<td>20</td>
<td>80.4%</td>
<td>455</td>
<td>78.1%</td>
<td>22.8</td>
</tr>
<tr>
<td>Central Coast</td>
<td>37</td>
<td>82.7%</td>
<td>763</td>
<td>82.4%</td>
<td>20.6</td>
</tr>
<tr>
<td>Central NSW</td>
<td>32</td>
<td>81.6%</td>
<td>820</td>
<td>91.4%</td>
<td>26.0</td>
</tr>
<tr>
<td>The Hunter</td>
<td>141</td>
<td>87.4%</td>
<td>2,288</td>
<td>88.1%</td>
<td>16.2</td>
</tr>
<tr>
<td>New England North West</td>
<td>26</td>
<td>86.6%</td>
<td>653</td>
<td>75.9%</td>
<td>24.6</td>
</tr>
<tr>
<td>North Coast region</td>
<td>286</td>
<td>96.9%</td>
<td>3,012</td>
<td>95.9%</td>
<td>10.5</td>
</tr>
<tr>
<td>Outback NSW</td>
<td>10</td>
<td>90.8%</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Riverina</td>
<td>21</td>
<td>84.8%</td>
<td>586</td>
<td>94.0%</td>
<td>28.5</td>
</tr>
<tr>
<td>Snowy Mountains</td>
<td>19</td>
<td>85.6%</td>
<td>296</td>
<td>83.0%</td>
<td>15.5</td>
</tr>
<tr>
<td>South Coast region</td>
<td>120</td>
<td>93.1%</td>
<td>2,498</td>
<td>91.1%</td>
<td>20.8</td>
</tr>
<tr>
<td>The Murray</td>
<td>15</td>
<td>76.8%</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Total</td>
<td>2,836</td>
<td>82.9%</td>
<td>76,299</td>
<td>89.0%</td>
<td>26.9</td>
</tr>
</tbody>
</table>

- = estimate considered statistically unreliable

‘Blue Mountains’ (97.7%) had the highest proportion of international visitors who engaged in a nature based activity. ‘North Coast region’ (96.9%) had the 2nd highest proportion, followed by ‘South Coast region’ (93.1%).

‘Blue Mountains’ (98.1%) had the highest proportion of nights spent by nature based visitors, followed by ‘North Coast region’ (95.9%) and ‘Riverina’ (94.0%).

Transport in NSW

‘Aircraft’ (33.5%) was the most common transport used to destinations in NSW by international nature based visitors. ‘Private vehicle or company car’ (27.1%) was the 2nd most common, followed by ‘local public transport’ (16.1%).

Travel party

Nearly 1/2 (47.5%) of international nature based visitors to NSW arrived in Australia ‘alone’. Their 2nd most common travel party description was ‘adult couple’ (22.4%), followed by ‘friends or relatives’ (14.2%).

Travel package

Over 1/5 (20.2%) of international nature based visitors to NSW, arrived in Australia on a travel package. This was a higher percentage than for all visitors to the State (17.5%). ‘All accommodation’ (87.0%) was the most popular travel arrangement included in the package (other than ‘international airfares’).

Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

† Source: International Visitor Survey, YE Dec 15, Tourism Research Australia (TRA).
† Source: National Visitor Survey, YE Dec 15, TRA.
Domestic Market

The information in this section relates to domestic visitors who engaged in a nature based activity in NSW. Domestic overnight visitors and domestic daytrips are shown separately.

Visitors and nights

NSW received over 10.6 million domestic overnight nature based visitors - up by 7.1%* on YE Dec 14. They spent nearly 39.6 million nights in the State - up by 3.0% on YE Dec 14.

Market share

Nature based travellers represented 37.8% of visitors and 43.4% of nights by domestic overnight travellers to NSW. Compared with YE Dec 14, the share of visitors was up by 1.0% pt and the share of nights was down by 0.5% pts.

The State received 32.1% of visitors and 29.3% of nights by nature based travellers in Australia. Compared with YE Dec 14, the share of visitors was down by 0.9% pts and the share of nights was down by 0.3% pts.

Expenditure (incl airfares and transport costs)

Domestic overnight nature based visitors to NSW spent an estimated $7.9 billion during their trip - up by 10.2%* on YE Dec 14. On average, visitors spent $743 per visitor and $199 per night in NSW.

Origin

NSW received 67.1% of domestic overnight nature based visitors from intrastate and 32.9% from interstate. Sydney (35.3%) was the biggest source market, while Queensland (12.8%) was the biggest interstate market.

Intrastate contributed 60.7% of nature based visitor nights in the State, while interstate contributed 39.3%. Sydney (31.2%) was the biggest source market, while Victoria (13.9%) was the biggest interstate market.

Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

(1) Source: International Visitor Survey, YE Dec 15, Tourism Research Australia (TRA).

(2) Source: National Visitor Survey, YE Dec 15, TRA.

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Destinations in NSW

The Murray

Capricorn

Coffs Harbour

Goulburn

Hunters Hill

New England North West

North Coast NSW

Outback NSW

Riverina

Snowy Mountains

South Coast

Total

Visitors

Nights

Average stay (nights)

Average stay (nights)

Region

Visitors

Nights

Average stay (nights)

Sydney

2,158

7,700

3.6

Blue Mountains

477

1,050

54.1

Central Coast

2,544

21.0

29.5

Central NSW

432

1,303

27.3

Hunter

1,158

3,545

41.2

New England North West

275

1,038

24.0

North Coast NSW

2,702

11,368

64.6

Outback NSW

84

- -

Riverina

93

- -

Snowy Mountains

310

1,066

43.2

South Coast

2,010

7,610

62.2

The Murray

208

682

23.2

Total

10,608

39,560

43.4

- = estimate considered statistically unreliable

'South Coast region' (58.6%) had the highest proportion of domestic overnight visitors who engaged in a nature based activity. 'North Coast region' (57.8%) had the 2nd highest proportion, followed by 'Central Coast' (53.7%).

'North Coast region' (64.6%) had the highest proportion of nights spent by nature based visitors, followed by 'South Coast region' (62.2%) and 'Central Coast' (59.5%).

Average length of stay

Domestic nature based visitors stayed, on average, 3.7 nights in NSW. This was longer than the average for all visitors to the State (3.2 nights).

Interstate visitors to NSW stayed 1 night longer than intrastate visitors (4.4 vs 3.4 nights).

Accommodation in NSW

‘Friends or relatives property’ (35.2%) was the most popular accommodation type used for domestic nature based visitor nights in NSW. ‘Caravan park or commercial camping ground’ (16.3%) was the 2nd most popular, followed by ‘rented house, apartment, flat or unit’ (14.3%).

Travel party

‘Adult couple’ (27.4%) was the most common travel party of domestic overnight nature based visitor to NSW. ‘Family group’ (26.0%) was the 2nd most common, followed by ‘friends or relatives’ (25.7%).
Domestic Market continued

Age groups

<table>
<thead>
<tr>
<th>Nature based activity</th>
<th>15-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50-59</th>
<th>60-69</th>
<th>70+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go to the beach</td>
<td>28.6%</td>
<td>18.1%</td>
<td>18.0%</td>
<td>16.5%</td>
<td>13.3%</td>
<td>5.4%</td>
</tr>
<tr>
<td>Visit national parks or state parks</td>
<td>21.5%</td>
<td>18.8%</td>
<td>20.1%</td>
<td>18.1%</td>
<td>15.4%</td>
<td>6.2%</td>
</tr>
<tr>
<td>Visit botanical or other public gardens</td>
<td>17.6%</td>
<td>16.4%</td>
<td>20.7%</td>
<td>16.8%</td>
<td>17.1%</td>
<td>11.3%</td>
</tr>
<tr>
<td>Go whale or dolphin watching</td>
<td>19.7%</td>
<td>10.8%</td>
<td>23.8%</td>
<td>21.9%</td>
<td>11.6%</td>
<td>12.3%</td>
</tr>
<tr>
<td>Visit farms</td>
<td>22.1%</td>
<td>15.9%</td>
<td>16.1%</td>
<td>18.5%</td>
<td>17.1%</td>
<td>10.3%</td>
</tr>
<tr>
<td>Bushwalking or rainforest walks</td>
<td>21.3%</td>
<td>18.6%</td>
<td>22.5%</td>
<td>16.9%</td>
<td>14.2%</td>
<td>6.5%</td>
</tr>
<tr>
<td>Visit wildlife parks, zoos or aquariums</td>
<td>18.1%</td>
<td>26.4%</td>
<td>24.2%</td>
<td>13.8%</td>
<td>12.6%</td>
<td>5.0%</td>
</tr>
<tr>
<td>All nature based visitors</td>
<td>25.7%</td>
<td>17.9%</td>
<td>18.5%</td>
<td>17.0%</td>
<td>14.5%</td>
<td>6.4%</td>
</tr>
</tbody>
</table>

‘15 to 29 years’ (25.7%) was the biggest age group of domestic overnight nature based visitors to NSW. ‘40 to 49 years’ (18.5%) was the 2nd biggest age group, followed by ‘30 to 39 years’ (17.9%).

Transport in NSW

‘Private vehicle or company car’ (80.1%) was the most common transport used to destinations in NSW by domestic overnight nature based visitors. ‘Aircraft’ (12.8%) was the 2nd most common, followed by ‘railway’ (3.7%).

Seasonality

Over 1/8 (15.6%) of domestic overnight nature based visitors to NSW returned from their trip in January. August (5.9%) had the lowest percentage of those who returned from their trip.

Over 1/5 (22.4%) of nights by domestic nature based visitors to NSW were spent by those who returned from their trip in January. August (4.5%) had the lowest percentage of nights by those who returned from a trip to the State.

Gender

More domestic overnight nature based visitors to NSW were females (52.3%) than males (47.7%).

Type of nature based activity

<table>
<thead>
<tr>
<th>Rank</th>
<th>Nature based activity</th>
<th>Visitors ('000)</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Go to the beach</td>
<td>6,768</td>
<td>63.8%</td>
</tr>
<tr>
<td>2</td>
<td>Bushwalking or rainforest walks</td>
<td>3,005</td>
<td>28.3%</td>
</tr>
<tr>
<td>3</td>
<td>Visit national parks or state parks</td>
<td>2,695</td>
<td>25.4%</td>
</tr>
<tr>
<td>4</td>
<td>Visit botanical or other public gardens</td>
<td>1,217</td>
<td>11.5%</td>
</tr>
<tr>
<td>5</td>
<td>Visit wildlife parks, zoos or aquariums</td>
<td>573</td>
<td>5.4%</td>
</tr>
<tr>
<td>6</td>
<td>Visit farms</td>
<td>483</td>
<td>4.6%</td>
</tr>
<tr>
<td>7</td>
<td>Go whale or dolphin watching</td>
<td>156</td>
<td>1.5%</td>
</tr>
</tbody>
</table>

‘Go to the beach’ (63.8%) was the most popular nature based activity undertaken by domestic overnight visitors to NSW. ‘Bushwalking or rainforest walks’ (28.3%) was the 2nd most popular, followed by ‘visit national parks or State parks’ (25.4%).

NSW received over 11.8 million domestic daytrip nature based visitors - up by 14.1%* on YE Dec 14.

Market share - daytrips

Nature based day-trippers represented 21.4% of domestic daytrip visitors to NSW. Compared with YE Dec 14, the share was up by 1.0% pt.

The State received 29.9% of nature based daytrip travellers in Australia. Compared with YE Dec 14, the share was down by 0.7% pts.

Expenditure on daytrips

Domestic daytrip nature based visitors to NSW spent an estimated $1.1 billion during their trip - down by 2.3% on YE Dec 14. On average, visitors spent $94 per trip in NSW.

Type of nature based activity on daytrips

‘Go to the beach’ (54.1%) was the most popular nature based activity undertaken by domestic daytrip visitors to NSW. ‘Visit national parks or State parks’ (24.5%) was the 2nd most popular, followed by ‘bushwalking or rainforest walks’ (21.6%).

Gender

More domestic daytrip nature based visitors to NSW were males (53.2%) than females (46.8%).

Age groups

‘15 to 29 years’ (31.3%) was the biggest age group of domestic daytrip nature based visitors to NSW. ‘30 to 39 years’ (20.1%) was the 2nd biggest age group, followed by ‘40 to 49 years’ (16.5%).

Definition[6] and further information

# A nature based visitor participates in at least one of the following activities: bushwalking or rainforest walks; visit national parks or State parks; whale or dolphin watching; visit botanical or other public gardens; visit farms; go to the beach; visit wildlife parks, zoos or aquariums; and visit the outback (international visitors only). Note: a visitor may also participate in other activities.

[6] This activity list has some variations from the definition used by Tourism Research Australia.

Please see www.destinationnsw.com.au for detailed profiles on travel to each of NSW's regions and information on domestic and international travel to the State.

Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.