

## Overview

NSW received nearly 25.3 million international <sup>(1)</sup> and domestic <sup>(2)</sup> 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 <sup>(3)</sup> (incl package expenditure by overseas visitors) in NSW - up by 13.1% on YE Dec 14.

<sup>(1)</sup> Source: International Visitor Survey, YE Dec 15, Tourism Research Australia.

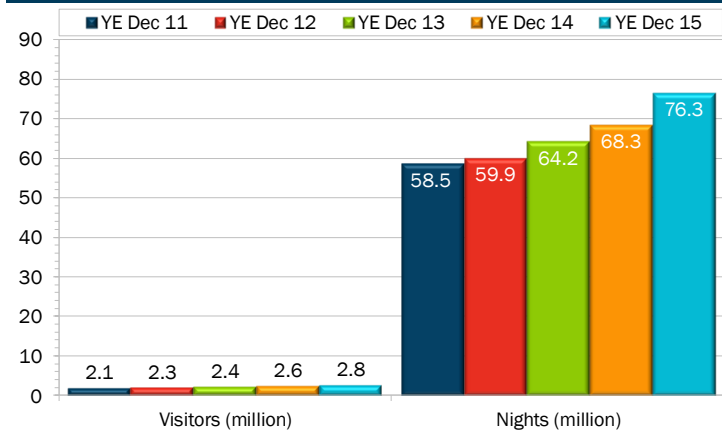
<sup>(2)</sup> Source: National Visitor Survey, YE Dec 15, Tourism Research Australia.

<sup>(3)</sup> Total expenditure on the trip.

## International Market <sup>(1)</sup>

The information in this section relates to international overnight visitors who engaged in a 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

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

'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 2<sup>nd</sup> most popular.

## Origin

Rank	Market	Visitors		Nights		Average stay (nights)
		('000)	%	('000)	%	
1	Mainland China	518	18.3%	14,050	18.4%	27.1
2	United Kingdom	320	11.3%	8,200	10.7%	25.6
3	USA	313	11.0%	4,548	6.0%	14.6
4	New Zealand	213	7.5%	3,114	4.1%	14.7
5	South Korea	153	5.4%	5,217	6.8%	34.1
	Other Asian markets (4)	638	22.5%	20,376	26.7%	31.9
	Other European markets (5)	438	15.4%	13,037	17.1%	29.8
	All other countries	244	8.6%	7,757	10.2%	31.8
	Total	2,836		76,299		26.9

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%).

<sup>(4)</sup> All Asian markets, excluding Mainland China and South Korea.

<sup>(5)</sup> All European markets, excluding United Kingdom.

### 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).

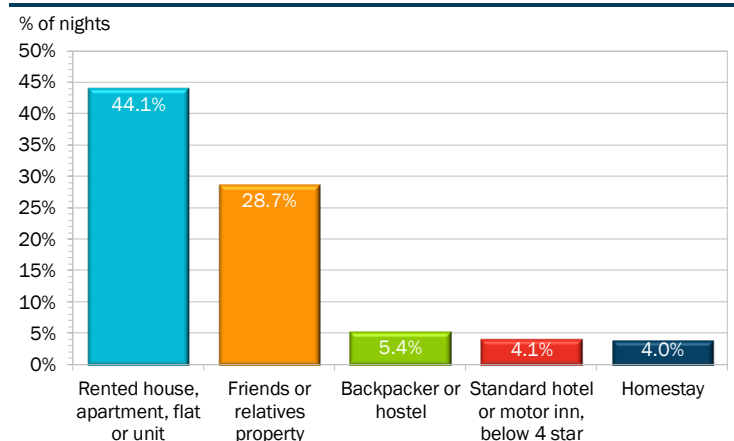
### Seasonality

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 2<sup>nd</sup> 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.

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

<sup>(2)</sup> Source: National Visitor Survey, YE Dec 15, TRA.

## International Market continued

### Destinations in NSW

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

- = estimate considered statistically unreliable

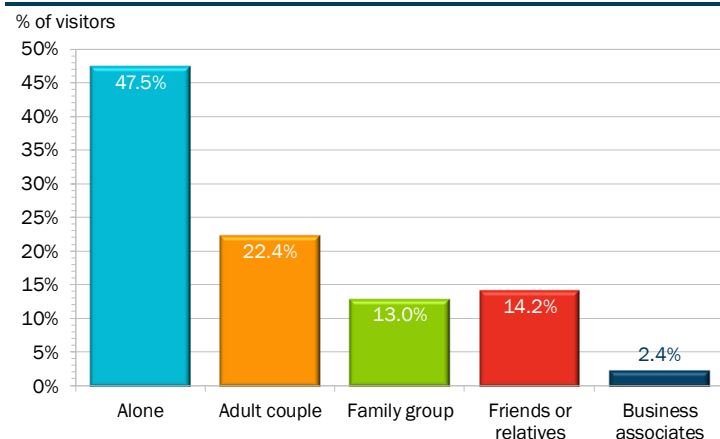
'Blue Mountains' (97.7%) had the highest proportion of international visitors who engaged in a nature based activity. 'North Coast region' (96.9%) had the 2<sup>nd</sup> highest proportion, followed by 'South Coast region' (93.1%).

'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 2<sup>nd</sup> most common, followed by 'local public transport' (16.1%).

### Travel party



Nearly ½ (47.5%) of international nature based visitors to NSW arrived in Australia 'alone'. Their 2<sup>nd</sup> most common travel party description was 'adult couple' (22.4%), followed by 'friends or relatives' (14.2%).

### Travel package

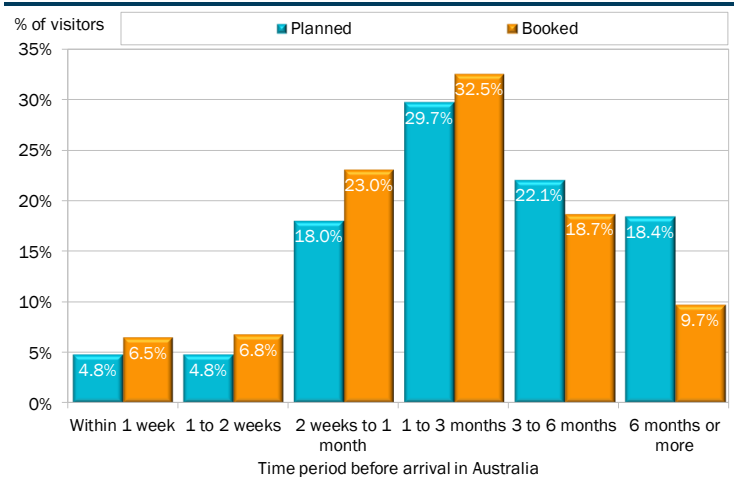
Over 1/5 (20.2%) of international nature based visitors to NSW, arrived in Australia on a travel package. This was a higher percentage than for all visitors to the State (17.5%). 'All accommodation' (87.0%) was the most popular travel arrangement included in the package (other than 'international airfares').

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.

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

## Planned and booked the trip



Nearly 3/10 (29.7%) of international nature based visitors to NSW planned the trip to Australia between '1 and 3 months' before they arrived. '1 to 3 months' (32.5%) was also the most popular time period to book before arrival.

### Return visitors

Over 2/5 (44.7%) of international nature based visitors to NSW were on a return visit to Australia. This was a lower percentage than for all visitors to the State (51.5%).

### Group tours

The rate of group tour travel to Australia amongst international nature based visitors who had been to NSW was 13.4%. This was a higher percentage than for all visitors to the State (11.5%).

### Gender

More international nature based visitors who had been to NSW were females (54.2%) than males (45.8%).

### Age groups

	15-29 years	30-39 years	40-49 years	50-59 years	60-69 years	70 years+
Nature based activity	%	%	%	%	%	%
Go to the beach	38.0%	17.6%	12.7%	15.2%	13.0%	3.4%
Visit national parks or state parks	36.6%	17.2%	12.7%	15.5%	14.1%	4.0%
Visit botanical or other public gardens	36.3%	16.4%	12.2%	16.2%	14.9%	3.9%
Go whale or dolphin watching	42.7%	16.7%	12.9%	13.3%	11.1%	3.3%
Visit the outback	45.6%	15.1%	9.7%	11.7%	13.1%	4.8%
Visit farms	39.3%	16.2%	11.9%	15.9%	13.8%	2.8%
Bushwalking or rainforest walks	39.6%	16.7%	11.4%	14.8%	14.2%	3.3%
Visit wildlife parks, zoos or aquariums	39.5%	17.4%	12.8%	15.2%	12.1%	3.0%
All nature based visitors	36.1%	17.9%	13.4%	15.6%	13.2%	3.8%

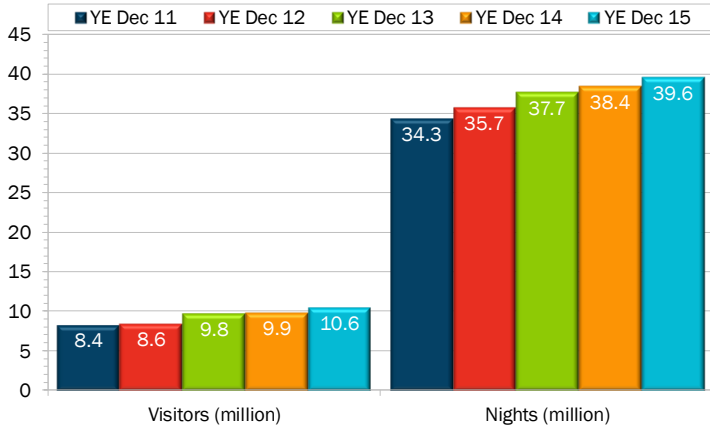
'15 to 29 years' (36.1%) was the biggest age group of international nature based visitors to NSW. '30 to 39 years' (17.9%) was the 2<sup>nd</sup> biggest age group. '15 to 29 years' was the largest age group for each type of nature based activity.

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

## Domestic Market (2)

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

Market	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
Regional NSW	3,377	31.8%	11,688	29.5%	3.5
Sydney	3,740	35.3%	12,345	31.2%	3.3
Total intrastate	7,118	67.1%	24,033	60.7%	3.4
Queensland	1,354	12.8%	5,367	13.6%	4.0
Victoria	1,023	9.6%	5,513	13.9%	5.4
ACT	625	5.9%	2,104	5.3%	3.4
Other interstate	488	4.6%	2,544	6.4%	5.2
Total interstate	3,491	32.9%	15,528	39.3%	4.4
Total NSW	10,608		39,560		3.7

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).

## Destinations in NSW

Region	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
Sydney	2,158	23.2%	7,700	31.1%	3.6
Blue Mountains	447	53.1%	1,090	54.1%	2.4
Capital Country	351	27.3%	1,038	35.4%	3.0
Central Coast	736	53.7%	2,486	59.5%	3.4
Central NSW	428	22.1%	1,303	25.7%	3.0
Hunter	1,158	37.6%	3,545	41.2%	3.1
New England North West	275	21.0%	1,038	24.0%	3.8
North Coast NSW	2,702	57.8%	11,368	64.6%	4.2
Outback NSW	84	22.8%	-	-	-
Riverina	93	10.4%	-	-	-
Snowy Mountains	310	41.7%	1,066	43.2%	3.4
South Coast	2,010	58.6%	7,610	62.2%	3.8
The Murray	208	18.9%	682	23.2%	3.3
Total	10,608	37.8%	39,560	43.4%	3.7

- = 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 2<sup>nd</sup> 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

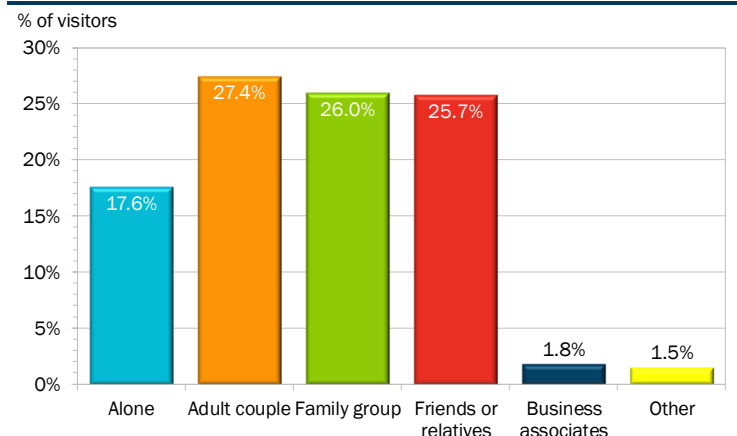
Domestic nature based visitors stayed, on average, 3.7 nights in NSW. This was longer than the average for all visitors to the State (3.2 nights).

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 2<sup>nd</sup> 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 visitors to NSW. 'Family group' (26.0%) was the 2<sup>nd</sup> most common, followed by 'friends or relatives' (25.7%).

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

## Domestic Market continued

### Age groups

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

'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 2<sup>nd</sup> 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 2<sup>nd</sup> 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

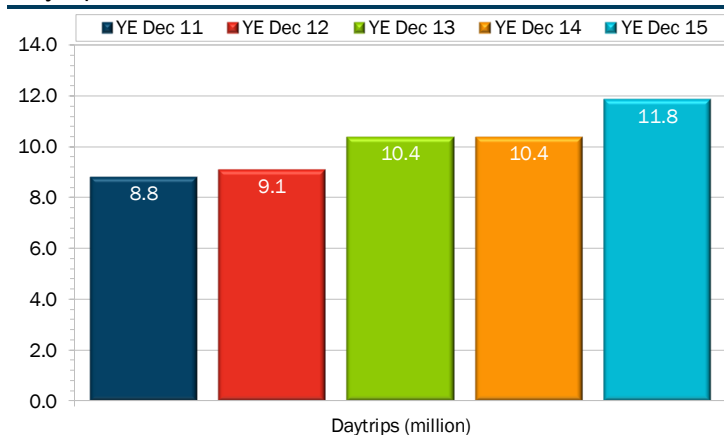
More domestic overnight nature based visitors to NSW were females (52.3%) than males (47.7%).

### Type of nature based activity

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

'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 2<sup>nd</sup> most popular, followed by 'visit national parks or State parks' (25.4%).

### Daytrips



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 2<sup>nd</sup> 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 2<sup>nd</sup> biggest age group, followed by '40 to 49 years' (16.5%).

### Definition<sup>(6)</sup> 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.

<sup>(6)</sup> This activity list has some variations from the definition used by Tourism Research Australia.

Please see [www.destinationnsw.com.au](http://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