

INTRODUCTION

This document provides demographic profile of domestic and international short break¹ visitors to NSW, and their travel behaviour. It makes comparisons in terms where they go, who they go with, where they stay, their main activities and mode of transport they use.

For the international short break market to NSW, this document reports only on Holiday visitors who spent one to three nights in Australia whose only stopover destination in their trip was NSW.

The annual study into the Australian travel mindset, *Domesticate*² reported that short breaks are a vital component of a happy life, offering a chance to get away from city busyness and to refresh and relax. Domestic short breaks are often a mix of planned and spontaneous trips, spread across the calendar to provide milestones to look forward to. Australians like to make short domestic trips often, even after returning from long-haul overseas trips.

The study also reported that travel within Australia fulfils a range of different needs such as need for rejuvenation, a break from normality or connecting with family. The key drivers for domestic travel by Australians focus around ease and convenience. Key attributes of destinations include:

- Somewhere relaxed and easy with beautiful surroundings (e.g. scenery and beaches), in the same time zone, which have familiar restaurants, healthcare and amenities;
- Accessible locations particularly for short breaks, often only a few hours' drive from home.

The short breaks market to Australia accounts for a quarter (25%) of total overnight visitors (domestic and international) to the country. Domestic visitors account for majority (98%) of the short breaks market while international visitor's market share is only 2%.

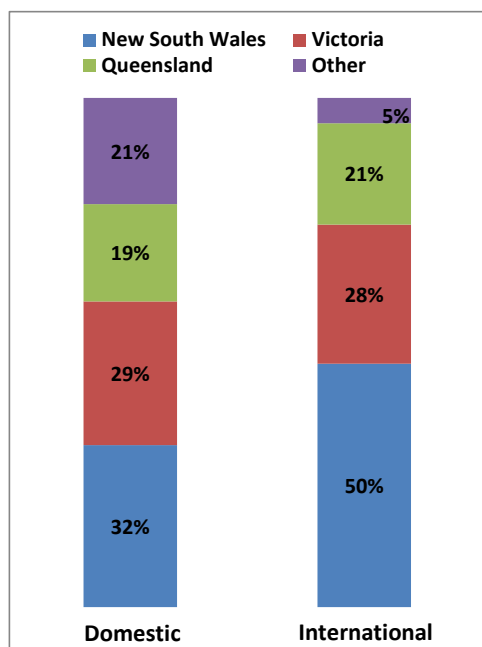
¹ In this document 'Short Break Visitor' is defined as a visitor who spends between one and three nights away from home/overseas for Holiday purposes.

² *Domesticate* is an annual syndicated study conducted by research company TNS Australia, which looks into the Australian travel market, their mindset, attitudes to travel and outlook.

MARKET SIZE

In the year ended (YE) September 2015, there were 7.4 million domestic short break trips to NSW (up 4% on YE September 2014). These visitors stayed over 13.7 million nights in the state (up 2% on the previous year).

Chart 1: Short Break Visitors – Market Share (%)



NSW leads other Australian states and territories in domestic and international short break visitors.

Domestic short break visitors to NSW accounted for almost a third (32%) of the total Australian short breaks market. Victoria received 29% of the domestic short break visitors while Queensland received 19%. NSW's share of domestic short break visitors in YE September 2015 was steady when compared to the YE September 2006 (down 0.1% points)

Half (50%) of **international** short break visitors to Australia came to NSW, 28% to Victoria and 21% to Queensland. Other states and territories accounted for 5% of international short break visitors to Australia. NSW's share of the international short breaks market for the year has increased by 3.4% points.

Source: National and International Visitor Surveys, Year Ending September 2015.

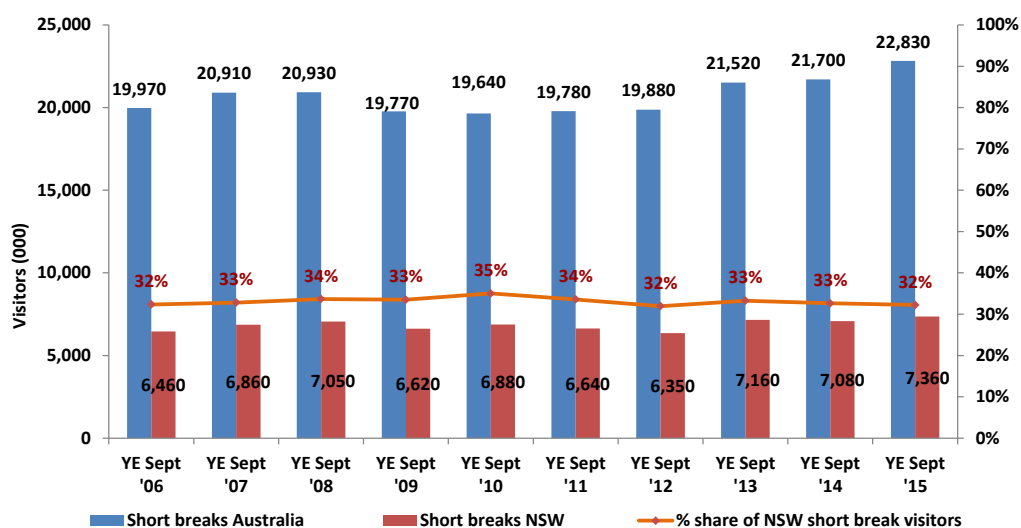
MARKET TREND

Domestic travel

Over the past ten years, domestic short breaks market in **Australia** has seen some minor oscillations. Since YE September 2006, the total number of visitors has increased by 14%.

In the past decade, short breaks market in **NSW** also grew by 14%. NSW has been the top destination for domestic short break visitors to Australia accounting for around a third of the market.

Chart 2: Domestic Short Break visitors



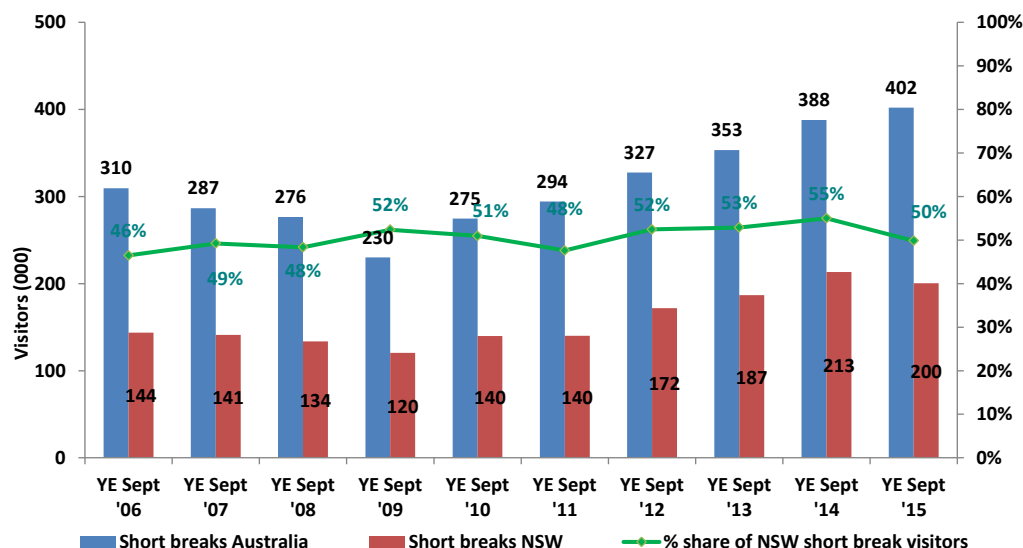
Source: National Visitor Survey, YE September 2006 – YE September 2015.

International travel

Since year ended September 2006, the number of international short break visitors to **Australia** has increased by 30%. In the same period, short break visitors to **NSW** have increased by 39%. A minor drop in the visitation occurred in YE September 2009 in the State, however the market recovered in the following years and grew substantially, up by 66% by YE September 2015.

Over the past ten years, NSW has been the top destination receiving around half of international short break visitors to Australia.

Chart 3: International Short Break visitors

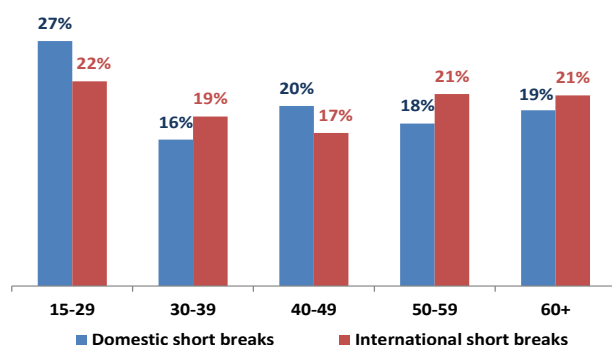


Source: International Visitor Survey, YE September 2006 – YE September 2015.

VISITOR PROFILE

Age

Chart 4: Short Break Visitors to NSW



Source: National and International Visitor Surveys, Year Ending September 2015.

In YE September 2015, the youth market (15-29 years) was the largest age group for **total** short break visitors to NSW. International youth visitors accounted for 22% of total international short break visitors while domestic accounted for 27% of total domestic short break visitors to the state.

Since YE September 2006, the strongest increase in **total** short break visitation was recorded by visitors aged 60 years and over, up 37%. By comparison, youth visitors (15-29 years) increased by 26% over the decade.

Travel Party

In YE September 2015, adult couples were the most common travel party amongst short break visitors to NSW, with nearly one third (32%) of **domestic** short break visitors and 42% of **international** short break visitors. Australian short break visitors to NSW were more likely to travel with friends and relatives (28%) and with friends and family with children (27%) while international visitors taking short breaks were more likely to visit NSW as lone travellers (25%).

Table 1: Travel Party

Travel Party	Domestic Visitors (%)	International Visitors (%)
Travelling alone	10%	25%
Adult couple	32%	42%
Friends and/ or family groups travelling with children	27%	14%
Friends and/ or relatives travelling together	28%	16%
Other	2%	3%

Source: National and International Visitor Surveys, Year Ending September 2015.

Since YE September 2006, friends and relatives travelling together without children recorded the strongest increase in the **domestic** short breaks market (up 45%) while the adult couples group had the highest growth in the **international** short breaks market (up 76%).

Market source

Domestic

Table 2: Intrastate and Interstate Travel to NSW

Source Market	Short Break Visitors (%)
NSW	74%
Sydney	38%
Regional NSW	36%
Queensland	10%
Victoria	7%
ACT	7%
South Australia	2%
Other	1%

Source: National and International Visitor Surveys, Year Ending September 2015.

In YE September 2015, the majority (74%) of domestic short break visitors to **NSW** came from within the State, almost evenly divided between Sydney residents (38%) and Regional NSW residents (36%). **Interstate** short break visitors mostly came from Queensland (10%), Victoria (7%) and ACT (7%).

Of all **intrastate** short break visitors to NSW, just over half (51%) came from Sydney while 13% came from The Hunter and 8% from South Coast.

Over the past decade, the highest growth in short break visitors to **NSW** were from ACT (up 61%) and South Australia (up 50%). Of the NSW regions, short break visitors from Capital Country and Central NSW recorded the strongest increases (up 54% and 39% respectively).

International

In YE September 2015, top source markets to **NSW** for short breaks were China (24%) followed by Korea (17%), New Zealand and USA (each at 12% share) and Japan (7%).

Since YE September 2006, there have been some considerable increases in the number of short break visitors to **NSW**. Arrivals from USA more than doubled (up 139%) while arrivals from China more than tripled (up 223% from YE September 2008³).

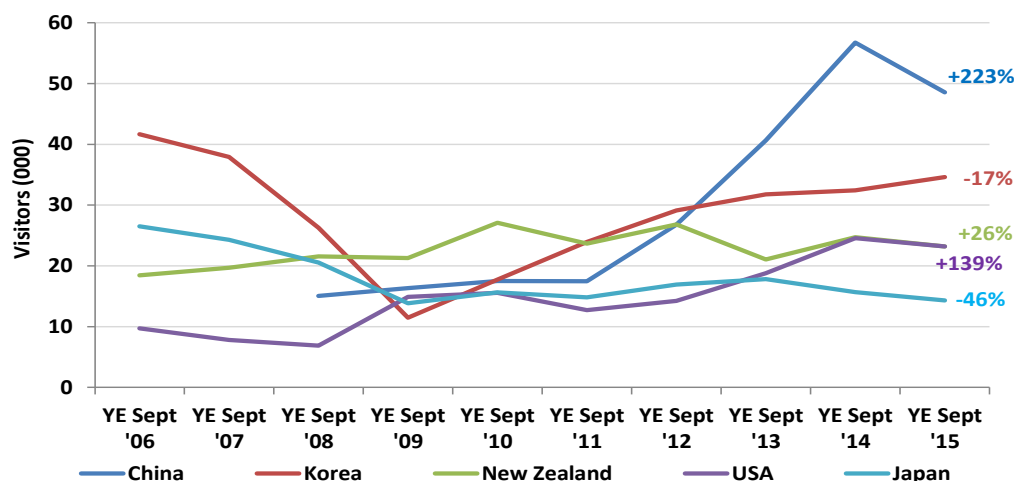
³ Data for China for YE September 2006 and YE September 2007 cannot be reported due to a very small sample size.



While New Zealand visitors may have travelled to Australia for short breaks, the medium to long-haul markets could have possibly travelled to Australia as part of a dual or multi-country trip.

There is a lot of dual destination travel out of the US, with almost three-quarters of Holiday travellers visiting another country during their trip. Australia is the preferred option for upwards of 60 per cent of travellers over the summer period with the Pacific Islands (Fiji, Tahiti and Cook Islands) more popular during other periods of the year. The Chinese market continues to be predominantly dual destination and most Chinese holiday visitors visit Australia and another country (usually New Zealand) as part of the same trip.⁴

Chart 5: Short Break visitors to NSW by Country of Origin - Top 5



Source: International Visitor Survey, YE September 2006 – YE September 2015

Destination

Table 3: Travel to NSW

Destinations	Domestic Visitors (%)	International Visitors (%)
Sydney	24%	98%
Regional NSW	76%	4%
North Coast NSW	16%	*
South Coast	16%	*
Hunter	12%	*
Central NSW	6%	*
Central Coast	5%	*
Blue Mountains	5%	*
The Murray	4%	*
Snowy Mountains	4%	*
Capital Country	4%	*
New England North West	3%	*
Riverina	2%	*
Outback NSW	1%	*

*Data unavailable due to small sample size

Source: National and International Visitor Surveys, Year Ending September 2015.

In YE September 2015, Regional NSW received three quarters (76%) of **domestic** short break visitors to NSW. The most popular regional destinations were coastal areas, i.e. South Coast and North Coast (16% each), followed by The Hunter (12%).

Nearly all **international** short break visitors (98%) came to Sydney and only a small proportion (4%) dispersed to Regional NSW.

Over the past ten years, the **total** number of short break visitors to NSW increased by 14%. Short break arrivals to Sydney grew by 28% and to Regional NSW by 10%.

March quarter is the most popular time of year for domestic short break travels to NSW.

The most popular quarter for international short break travels within NSW is December quarter.

⁴ Tourism New Zealand market profiles, www.tourismnewzealand.com

Activities

Table 4: Main Activities Undertaken

Activities	Domestic Visitors (%)	International Visitors (%)*
Social activities	87%	96%
Outdoor or nature activities	47%	73%
Sports or active outdoor activities	30%	5%
Local attractions or tourist activities	22%	66%
Arts / heritage / festival activities	22%	62%

Source: National and International Visitor Surveys, Year Ending September 2015.

In YE September 2015, the top activities for domestic and international short break visitors to NSW were social activities such as: eating or dining out, sightseeing, going to the beach and/ or doing shopping.

International visitors had a higher participation rate in visiting local attractions or undertaking tourist activities than domestic visitors (66% vs 22%).

Participating in sporting and/ or outdoor activities was more common amongst **domestic** travellers (30% vs 5% international travellers).

Accommodation

Table 5: Main Accommodation Types Used (nights) in NSW

Accommodation Type	Domestic Visitors (%)	International Visitors (%)
Standard hotel/motor inn (below 4 star)	22%	40%
Friends or relatives property	17%	6%
Luxury hotel or luxury resort (4 or 5 star)	14%	40%
Caravan park or commercial camping ground	14%	*
Rented house/apartment/flat or unit	11%	*
Backpacker or hostel	*	6%

*Data unavailable due to small sample size

Source: National and International Visitor Surveys, Year Ending September 2015.

In YE September 2015, preferred accommodation choices amongst **domestic** short break visitors to NSW included staying in a standard hotel, motel or resort (22%) and staying with friends or relatives (17%). Australians taking short breaks were more likely to stay with their friends or relatives than overseas visitors.

Majority of **international** short break visitors chose to stay in a commercial type of accommodation (standard or

luxury). The commercial accommodation is utilised more amongst overseas short break visitors than Australians.

Transport

In YE September 2015, car travel (84%) dominated transport choices amongst **domestic** visitors who travelled to NSW for short breaks. Almost half (43%) of **international** short break visitors used long distance transport (train, coach or bus) while some used local public transport (19%) and taxi or chauffeur driven hire car (18%).

Table 6: Main Transport Types Used for Domestic Travel

Transport Type in NSW	Domestic Visitors (%)	Transport Type in NSW	International Visitors (%)
Private or company vehicle	84%	Long distance transport	43%
Air transport	8%	Local public transport	19%
Railway	3%	Taxi / chauffeur driven hire car	18%

Source: National and International Visitor Surveys, Year Ending September 2015.



CONCLUSION

This paper provided the demographic and travel profile of domestic and international short break visitors to NSW.

The short breaks travel to Australia is dominated by domestic travel; however the number of International visitors coming to the country for short breaks has been increasing rapidly over the past few years.

- Around a quarter of short break visitors to Australia come to NSW, majority being Domestic travellers (98%).
- The largest proportion of short break visitors to NSW is youth segment (15 to 29 years); however the number of visitors aged 60 years and over has seen the strongest (and continuous) growth over the past ten years.
- Domestic short break visitors to NSW travel mostly with friends or relatives while International short break visitors that come to NSW are more likely to travel alone.
- Domestic short break visitors to NSW mainly come from within the state. China and Korea are currently the top two short break source markets. Short break visitors from China and USA have been growing considerably over the past few years.
- International short break visitors to NSW mostly visit Sydney while Domestic short break visitors mostly disperse to Regional NSW.
- Almost nine in ten short break travellers to NSW participated in some kind of social activities such as: eating or dining out, sightseeing, going to the beach and/ or doing shopping.
- Domestic short break visitors mostly stay with their friends or relatives while International visitors stay in hotels or similar type of accommodation.
- Domestic visitors mostly use the car as preferred type of transport while International visitors, not surprisingly, take long distance public transport.

MORE INFORMATION

For more information and statistics about tourism in NSW, see the *Tourism – Facts & Figures* page on the Destination NSW Corporate website at <http://www.destinationnsw.com.au/>.

