

This snapshot provides a profile of nature based visitors¹ to New South Wales in the year ended (YE) September 2017.² Research from Tourism Australia³ and Destination NSW⁴ point out that natural beauty and wildlife as well as beautiful beaches continue to be the important factors for international and domestic visitors when choosing a holiday destination.

VISITOR MARKET SIZE AND EXPENDITURE

In the YE Sep 17, the total number of International, Domestic overnight and Daytrip nature based visitors to NSW were 28.3 million. The State received 54.3% of International, 32.0% of Domestic overnight and 29.9% of Daytrip nature based visitors to Australia in YE September 2017.

Of the 28.3 million nature based visitors to NSW, 12.1% were from Overseas, 40.8% were from the Domestic overnight market and 47.2% were Domestic Daytrip visitors. Nature based visitors accounted for 83.7% of International visitors⁵ to NSW, 37.2% of Domestic overnight visitors and 22.9% of Daytrip visitors to NSW.

Nature based visitors stayed 129.2 million nights and spent \$19.6 billion in NSW. International visitors stayed 6x longer than Domestic overnight visitors in terms of average length of stay and hence, the average spend per visitor for International visitors were almost 4x that of Domestic overnight visitors. In terms of average spend per night, Domestic overnight nature based visitors spent 69% more per night than International visitors.

Table 1. Visitors, Nights and Expenditure

Visitors	Visitors (million)	Nights (million)	Average Length of Stay	Median Length of Stay	Total spend (\$ billion)	Spend per visitor	Spend per night
International	3.4	85.6	25 nights	6 nights	9.8	\$2,871	\$115
Domestic Overnight	11.6	43.5	4 nights	3 nights	8.4	\$730	\$194
Domestic Daytrip	13.4	-	-	-	1.3	\$97	-
TOTAL	28.3	129.2			19.6	\$690	\$151

Chart 1. Nature based Visitors to NSW

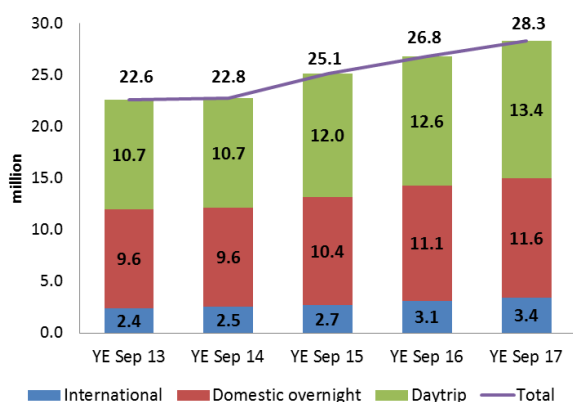
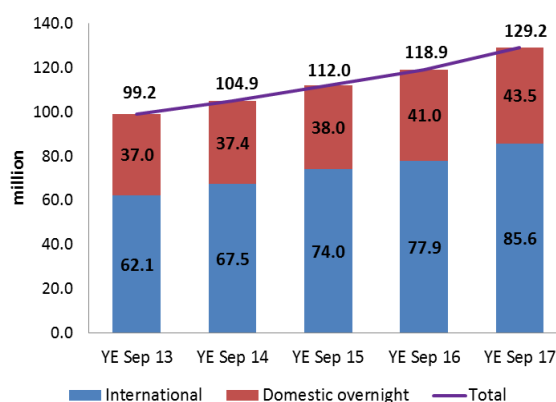


Chart 2. Nature based Visitor Nights in NSW



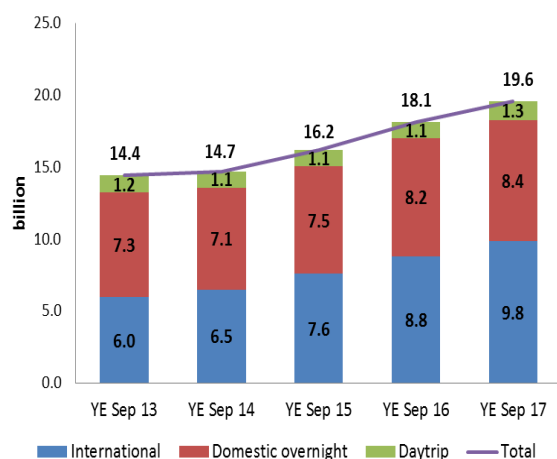
¹ Definition: A nature based visitor participates in at least one of the following activities: bushwalking or rainforest walks; visit national parks or State parks; whale or dolphin watching; visit botanical or other public gardens; visit farms; go to the beach; visit wildlife parks, zoos or aquariums; and visit the outback (international visitors only). Note: a visitor may also participate in other activities. This activity list has some variations from the definition used by Tourism Research Australia.

² Source: International Visitor Survey and National Visitor Survey, YE Sep 17, Tourism Research Australia.

³ Source: Tourism Australia Consumer Demand Project

⁴ Source: Destination NSW Brand Health Tracker

⁵ International visitors who engaged in a nature based activity in Australia, not necessarily in NSW.

Chart 3. Nature based Visitor Expenditure in NSW

In the YE Sep 17, total nature based visitors, nights and expenditure to NSW increased by 5.7%, 8.6% and 8.0% respectively on YE Sep 16. Domestic daytrip visitor spend increased the highest (+15.6%), followed by International overnight spend (+12.1%).

Compared to YE Sep 13, total nature based visitors, nights and expenditure to NSW grew by 25.3%, 30.3% and 35.9% respectively. In terms of **visitors**, the number of International overnight visitors grew the most over the five-year period (+44.8%), followed by Domestic daytrip visitors (+25.4%) and Domestic overnight visitors (+20.3%). In terms of **expenditure**, International visitor spend recorded the highest growth (+65.2%), followed by Domestic overnight spend (+16.1%).

NATURE BASED ACTIVITIES

Table 2. Top Activities

	Share of International visitors	Share of Domestic Overnight visitors	Share of Domestic Daytrip visitors
Go to the beach	84.6%	63.3%	50.7%
Visit national parks / state parks	65.1%	27.6%	28.0%
Visit botanical or other public gardens	55.8%	10.1%	14.7%
Visit wildlife parks / zoos / aquariums	50.5%	4.5%	np
Bushwalking / rainforest walks	33.0%	31.4%	23.2%
Visit farms	14.0%	4.1%	3.5%
Go whale or dolphin watching	12.8%	1.6%	np

In the YE Sep 17, 'Go to the beach' was the most popular activity undertaken by International nature based visitors (84.6%), Domestic overnight nature based visitors (63.3%) and Domestic daytrip nature based visitors (50.7%) to NSW.

The activity 'Go to the beach' was most popular with the youth segment (15 to 29 years) of International nature based visitors (36.2%), Domestic overnight nature based visitors (26.9%) and Domestic daytrip nature based visitors (34.2%) to NSW.

'Visit national parks/state' (65.1%) and 'Visit botanical or other public gardens' (55.8%) were the other top 2 popular nature based activities undertaken by International visitors. 'Bushwalking/rainforest' and 'Visit national parks / state parks' were the other top 2 popular nature based activities undertaken by Domestic overnight (31.4% and 27.6%) and Domestic daytrip (23.2% and 28.0%) nature based visitors to NSW.

In the last 5 years, 'Go the beach' remained the most popular activity undertaken by International, Domestic overnight and Daytrip nature based visitors to NSW.

SOURCE MARKETS

Table 3. Source Markets for International Nature based Visitors

		Visitors		Nights		ALOS
		('000)	% Share	('000)	% Share	(nights)
1	China	681.5	19.9%	18,686.1	21.8%	27.4
2	USA	390.6	11.4%	5,193.7	6.1%	13.3
3	UK	353.1	10.3%	8,233.5	9.6%	23.3
4	New Zealand	228.8	6.7%	2,598.4	3.0%	11.4
5	S. Korea	197.4	5.8%	4,703.5	5.5%	23.8
	Other Asia markets	817.6	23.9%	24,539.0	28.7%	30.0
	Other European markets	480.9	14.0%	12,675.7	14.8%	26.4
	All other countries	277.1	8.1%	9,005.7	10.5%	32.5
	Total	3,426.9	100.0%	85,635.6	100.0%	25.0

In the YE Sep 2017, China (19.9%) was the largest source of International nature based **visitors** to the State, followed by USA (11.4%) and the UK (10.3%). Over 90% of Chinese visitors to NSW participated in nature based activities during their trip.

Compared to YE Sep 16, the nature based visitors to NSW grew by 9.0%. Over the same period, China, USA, South Korea and the UK grew by 13.1%, 8.5%, 8.1% and 5.1%, respectively.

China (21.8%) was also the largest source market in terms of International nature based visitor **nights** in the State, followed by the UK (9.6%) and USA (6.1%). International nature based visitors stayed an average of 25.0 nights in NSW, and Chinese nature based visitors stayed an average of 27.4 nights.

Since YE Sep 2013, China has been the largest source market of International nature based **visitors** to NSW and also the largest contributor to visitor **nights** in NSW.

Table 4. Top Origin for Domestic Overnight and Daytrip visitors

	Share of Domestic Overnight visitors	Share of Domestic Daytrip visitors
Sydney	37.2%	56.0%
Regional NSW	30.4%	33.3%
Total Intrastate	67.6%	89.3%
Total Interstate	32.4%	10.7%
Total	100.0%	100.0%

In the YE Sep 17, Sydney was the largest source of Domestic overnight nature based visitors (37.2%) and Domestic daytrip nature based visitors (56.0%) to the State. Over one third of Sydney residents who visited NSW participated in nature based activities in the State.

In the last 5 years, Sydney has been the largest source of Domestic overnight and daytrip nature based visitors to NSW.

AGE GROUPS

Table 5. Age Groups

	Share of International visitors	Share of Domestic Overnight visitors	Share of Domestic Daytrip visitors
15-29	33.9%	24.7%	30.9%
30-39	17.6%	18.2%	19.9%
40-49	14.2%	18.6%	15.6%
50-59	16.0%	17.0%	15.1%
60+	18.3%	21.5%	18.5%

In the YE Sep 17, the youth market (15-29 years) was the largest age group among International nature based visitors (33.9%), Domestic overnight nature based visitors (24.7%), and Domestic daytrip nature based visitors (30.9%) to NSW.

In the last 5 years, the youth market has been the largest age group of International nature based visitors, Domestic overnight nature based visitors, and Domestic daytrip nature based visitors to NSW.

TRAVEL PARTY

Table 6. Most Common Travel Party

	Share of International visitors	Share of Domestic Overnight visitors
Alone	46.8%	17.2%
Adult Couple	22.4%	30.6%
Family Group	13.2%	24.3%
Friends or relatives	14.4%	25.3%
Other	3.1%	2.6%

In the YE Sep 17, International nature based visitors to NSW mostly travelled 'Alone' (46.8%), followed by travelling as an 'Adult couple' (22.4%). Amongst Domestic overnight nature based visitors, 'Adult Couple' was the most common travel party (30.6%), followed by travelling with 'Friends or relatives' (25.3%) and as 'family group' (24.3%).

In the last 5 years, travelling 'Alone' has been the most common travel party amongst International nature based visitors to NSW. From YE Sep 2013 to YE Sep 2014, 'Family group' was the most common travel party amongst Domestic overnight nature based visitors. Since YE Sep 2015, 'Adult couple' took the first place and became the top travel party for Domestic overnight nature based visitors.

DESTINATION

Table 7. Tourism Regions Visited in NSW

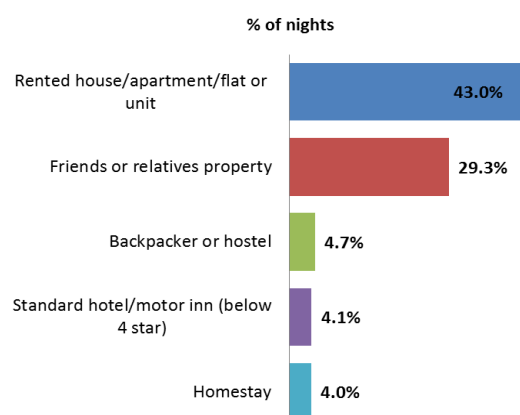
	Share of International visitors	Share of Domestic Overnight visitors	Share of Domestic Daytrip visitors
Sydney	93.6%	18.0%	27.0%
North Coast NSW	9.7%	26.0%	16.0%
Hunter	5.0%	10.4%	10.5%
South Coast	4.7%	20.2%	17.3%
Blue Mountains	3.3%	5.2%	11.4%
Central Coast	1.4%	6.1%	7.8%
New England North West	1.1%	2.6%	np
Central NSW	1.0%	4.3%	np
Capital Country	0.8%	2.8%	4.7%
Riverina	0.7%	np	np
The Murray	0.6%	1.6%	np
Snowy Mountains	0.5%	3.9%	np
Outback NSW	0.4%	np	np

In the YE Sep 2017, 'Sydney' was the most visited region in NSW by International nature based visitors (93.6%) and Domestic daytrip nature based visitors (27.0%), while 'North Coast' was the most visited region in NSW (26.0%) by Domestic overnight nature based visitors.

Sydney dominated the destination choice of International nature based visitors and Domestic daytrip nature based visitors to NSW in the past 5 years. The North Coast dominated the destination choice of Domestic overnight nature based visitors to NSW in the past 5 years.

ACCOMMODATION

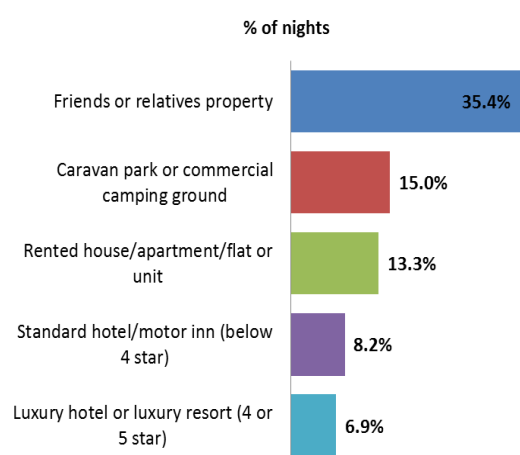
Chart 4. Most Popular Accommodation type for International Visitors



In the YE Sep 2017, 'Rented house/apartment/flat or unit' (43.0%) was the most popular accommodation type used by International nature based visitors in NSW. 'Friends or relatives property' (29.3%) was the 2nd most popular, followed by 'Backpacker or hostel' (4.7%), 'Standard hotel/motor inn (below 4 star)' (4.1%) and 'Homestay' (4.0%).

Since YE Sep 2013, 'Rented house/apartment/flat or unit' has been the most popular accommodation type used by International nature based visitors to NSW.

Chart 5. Most popular Accommodation type for Domestic Overnight Visitors

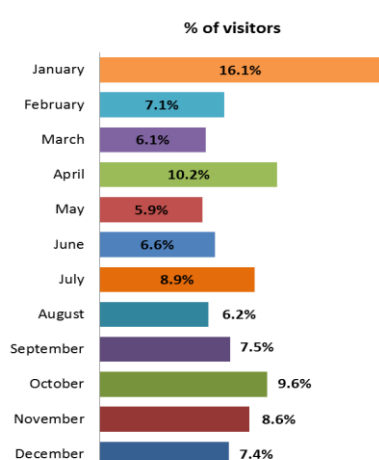


In the YE Sep 2017, 'Friends or relatives property' (35.4%) was the most popular accommodation type used by Domestic overnight nature based visitor in NSW. 'Caravan park or commercial camping ground' (15.0%) was the 2nd most popular, followed by 'Rented house/apartment/flat or unit' (13.3%).

Since YE Sep 2013, 'Friends or relatives property' has been the most popular accommodation type, used by Domestic overnight nature based visitors to NSW.

SEASONALITY

Chart 6. Seasonality of Domestic Overnight Nature based Visitors



In the YE Sep 17, nearly 1/6th of Domestic overnight nature based visitors to NSW returned from their trip in January, while May (5.9%) was the least popular month of return from trips.

In the last 5 years, January has been the most popular month among Domestic overnight nature based visitors to NSW for returning to their trip.