

This snapshot provides a profile of nature based visitors<sup>1</sup> to New South Wales in the year ended (YE) December 2018<sup>2</sup> as well as visitation trends.

As societies around the globe become increasingly urbanised, people may suffer from a phenomenon which Hugh McKay the social researcher terms as 'nature deficit'<sup>3</sup>. Latest research into the Australian travel mindset found that getting away from crowds is more important than ever before<sup>4</sup>. Holidays provide the perfect opportunity for people to take the time to reconnect with the natural world. Research from Tourism Australia<sup>5</sup> confirms 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. Nature based tourism acts as a drawcard for many destinations but also allows local councils and businesses to provide services to enable visitors to immerse themselves in the natural environment.



### Overview

In the YE December 2018, the total number of International, Domestic overnight and Daytrip nature based visitors to NSW was 31.1 million (up 9.0% on previous year). Of these visitors, 11% were from Overseas, 43% were from the Domestic overnight market and 46% were Domestic Daytrip visitors.

The State received 53% of International, 33% of Domestic overnight and 27% of Daytrip nature based visitors to Australia in the latest year.

Nature based visitors stayed 134.8 million nights and spent \$21.3 billion in NSW (up 5.2% and up 9.1%, respectively on YE December 2018). International visitors stayed 6 times longer than Domestic overnight visitors in terms of average length of stay and hence, the average spend per International visitor was 4 times that of Domestic overnight visitors, largely due to their longer average length of stay. In terms of average spend per night, however, Domestic overnight nature based visitors spent twice as much 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	3.5	85.5	24 nights	6 nights	9.8	\$2,763	\$114
Domestic Overnight	13.4	49.3	4 nights	3 nights	10.1	\$753	\$204
Domestic Daytrip	14.2	-	-	-	1.5	\$102	-
<b>TOTAL</b>	<b>31.1</b>	<b>134.8</b>			<b>21.3</b>	<b>\$685</b>	<b>\$158</b>

<sup>1</sup> 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 list of activities has some variations from the definition used by Tourism Research Australia.

<sup>2</sup> Source: International Visitor Survey and National Visitor Survey, YE Dec 18, Tourism Research Australia.

<sup>3</sup> Source: Australia Reimagined: Towards a more compassionate, less anxious society, Hugh Mackay, Macmillan, 2018

<sup>4</sup> Source: Domesticate 2018, Kantar TNS

<sup>5</sup> Source: Consumer Demand Project 2018, Tourism Australia

**Table 2. Nature based activities**

	International Visitors	Domestic Overnight visitors	Domestic Day trip visitors
Go to the beach	83%	62%	52%
Visit national parks / state parks	63%	31%	27%
Visit botanical or other public gardens	53%	12%	16%
Go whale or dolphin watching	12%	1%	1%
Visit farms	14%	4%	3%
Bushwalking / rainforest walks	32%	31%	24%
Visit wildlife parks / zoos / aquariums	49%	5%	3%

**Table 3. Regions visited**

	International visitors	Domestic Overnight visitors	Domestic Daytrip visitors
Sydney	94%	19%	26%
REG NSW	22%	82%	74%
North Coast NSW	10%	25%	18%
Hunter	5%	11%	10%
South Coast	5%	18%	16%
Blue Mountains	3%	5%	9%
Central Coast	2%	6%	9%
Central NSW	1%	5%	2%
New England North West	1%	2%	1%
Capital Country	1%	3%	4%
The Murray	1%	2%	1%
Snowy Mountains	1%	4%	1%
Riverina	1%	2%	1%
Outback NSW	0.3%	1%	0.3%

Going to the beach is by far the most popular activity for all nature based visitors to NSW. International nature based visitors undertake nature activities at a greater rate than their Domestic counterparts. For the Domestic market, going to a national park appears to go hand in hand with bushwalking while International visitors seem to experience national parks/state parks, in a less immersive way, in that two thirds visits a national park but only one third goes bushwalking. Unsurprisingly, the curated showcasing of our flora and fauna in botanic gardens and zoos/wildlife parks is more in demand by International visitors than Domestic visitors.

For the most part, International visitors participate in nature based activities in the Sydney region whereas the Domestic market undertakes most of its nature based activities in Regional NSW with the North Coast as the most popular destination for International and domestic visitors alike. It should be noted that the International figures do not include daytrips, hence regions close to large population centres such as Sydney are often visited by the International market as a daytrip e.g. Blue Mountains.

### International visitor profile

There were 3.5 million international visitors to NSW who took part in nature activities during their trip in Australia (up 2% when compared to YE December 2017). They stayed 85.5 million nights (up 1%) and spent \$9.8 billion (up 1.1%).

- Nature based visitors accounted for 81% of all international visitors to NSW, 89% of nights and 91% of expenditure.
- They travelled to NSW mainly for the purpose of Holiday (66%) while just over a quarter came to Visit friends and relatives (28%), followed by Business (6%) and Education (5%).
- The top five nature based international markets who visited NSW were China (19% of nature visitors to NSW), USA (11%), United Kingdom (9%), New Zealand (6%) and Korea (5%). Visitors from Japan and Switzerland recorded the strongest growth rates over the past year, each up 19%.
- Just under half of nature based international visitors to NSW (47%) were unaccompanied travellers (43% were in their 20s), 23% travelled as an adult couple (38% were aged 60 years+), 14% with their family and 13% travelled with their friends and relatives.
- The youth market (15-29 years) accounted for 32% of nature based international visitors to NSW. The second largest age group was 60 years+ (20%), followed by the 30-39 year olds (18%).
- Over half (54%) of all nature based international visitors to NSW were first time visitors to Australia and 60% were fully independent travellers (i.e. did not join a group tour).
- Rented house was the most popular type of accommodation utilised by nature based international visitors to NSW (44% of nights), followed by friends or relatives properties (29%).

## Domestic overnight visitor profile

The number of nature based domestic overnight visitors to NSW in YE December 2018 was 13.4 million, up 15% when compared to YE December 2017. They stayed 49.3 million nights (up 13.5%) and spent \$10.1 billion (up 18.5%).

- They accounted for 39% of all domestic overnight visitors to NSW, 46% of nights and 48% of expenditure.
- Nature based domestic overnight visitors to NSW travelled mainly for the purpose of Holiday (59%) while nearly a third came to Visit friends and relatives (32%) and 7% for Business.
- They were mainly from intrastate (68%). Of the domestic interstate nature visitors to NSW, 40% came from Queensland, more than a quarter from Victoria (28%), followed by 20% from the ACT.
- Over a quarter of nature based domestic overnight visitors to NSW were between 15 and 29 years (26%). Around 21% were aged 60 years+ and 20% were aged 30–39 years.
- Nature based domestic overnight visitors to NSW were mostly adult couples (28.5%) and friends or relatives travelling together (27.9%), followed by family group (23%) and solo travellers (18%).
- Nature based domestic overnight visitors to NSW who identified as having a disability or long term health condition were just as likely as the total domestic overnight market to undertake a nature based activity. Nature based activities have wide appeal and if made accessible should result in increased participation by visitors with disability. *(results obtained from supplementary disability questions in March QTR 2017, National Visitor Survey)*
- Staying in the homes of friends/relatives was the most popular type of accommodation utilised by nature based domestic overnight visitors to NSW (37% of nights), followed by commercial caravan parks (13.0%) and rented properties (12.7%).
- Seasonality for nature based domestic overnight visitors to NSW is determined by two main factors: school holidays and the seasons. January being both school holiday time and warm is the most popular month (15%) for a nature based visit to the State, followed by April and October (each attracting 10%). May, June and August are the least popular months for a nature based visit to NSW (each 6%). As is the case for all age groups, January is top month to travel for the 60+ market (11%), however as they have more flexibility in terms of when to travel, their trips are more evenly split across the year, hence a good segment to target for shoulder seasons. *(results based on average of 4 years data).*

## Domestic daytrip visitor profile

The number of nature based domestic daytrip visitors to NSW in YE December 2018 was 14.2 million, up 5% when compared to YE December 2017. They spent \$1.5 billion (up 7%).

- They accounted for 23% of all domestic day trip visitors to NSW and 21% of expenditure.
- They travelled mainly for the purpose of Holiday (73%) while just over one in five came to Visit friends and relatives (22%).
- Nature based domestic day trip visitors to NSW were mainly from intrastate (88%). Nearly two thirds of the interstate visitors were from Queensland (63%).
- Just over a quarter of nature based domestic daytrip visitors to NSW were between 15 and 29 years (27%). Around 22% were aged 60 years+ and 20% were aged 30–39 years.
- There is less fluctuation in seasonality for nature based domestic daytrip visitors to NSW than is the case for their overnight stay counterparts. January is the top month for a daytrip (11%) while March despite being the least popular month for travel (7%) is only 4 percentage points lower than the peak. *(results based on average of 4 years data)*

## Visitation trends

The volume of nature based visitors; nights and expenditure in NSW have increased since YE December 2010 and were highest on record for all three metrics for the international, domestic overnight and the domestic day trip markets. The growth in visitors and expenditure in YE December 2018 vs YE December 2017 (up 9% and up 8%, respectively) were higher than the average annual growth since YE December 2010 (up 6% and up 7%, respectively).

The share of international visitors to all nature based visitors to NSW have been steady in the last 9 years at 11% while there has been a slight increase in share of the domestic overnight visitors (from 41% in YE December 2010 to 43% in YE December 2018) at the expense of domestic day trippers (from 48% down to 46%).

International and Domestic Nature visitors to NSW											
YE December 2018											
 											
Source: International & National Visitor Survey, TRA											
<b>OVERVIEW</b>											
<b>GRAND TOTAL to NSW - overnight &amp; daytrip</b>											
	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2018 vs. 2017	% change 2018 vs. 2010
Visitors ('000)	19,578	19,305	19,891	22,584	23,851	25,863	27,087	28,525	31,095	9.0%	58.8%
Nights ('000)	88,727	92,569	95,229	101,583	105,339	114,374	119,587	128,203	134,810	5.2%	51.9%
Expenditure (\$ billion)	\$11.9	\$12.2	\$12.9	\$14.6	\$14.7	\$16.6	\$18.1	\$19.5	\$21.3	9.1%	78.4%
<b>Overnight - International &amp; Domestic</b>											
Visitors ('000)	10,255	10,508	10,812	12,203	12,348	13,417	14,380	15,080	16,915	12.3%	64.9%
Nights ('000)	88,727	92,569	95,229	101,583	105,339	114,374	119,587	128,203	134,810	5.2%	51.9%
Expenditure (\$ billion)	\$16.3	\$16.8	\$17.6	\$19.5	\$20.0	\$23.1	\$25.8	\$27.8	\$29.6	6.4%	81.7%
<b>Domestic - overnight &amp; daytrip</b>											
Visitors ('000)	17,351	17,158	17,830	20,156	21,062	22,864	23,891	25,054	27,559	10.0%	58.8%
Nights ('000)	32,592	34,349	35,731	37,741	37,279	38,827	41,334	43,430	49,277	13.5%	51.2%
Expenditure (\$ million)	\$6.6	\$6.9	\$7.2	\$8.5	\$8.2	\$8.9	\$9.3	\$9.9	\$11.5	16.9%	74.1%
<b>INTERNATIONAL OVERNIGHT TRAVEL</b>											
<b>Visitors, Nights and Expenditure</b>											
	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2018 vs. 2017	% change 2018 vs. 2010
Visitors (000)	2,227	2,147	2,281	2,408	2,589	2,799	3,196	3,471	3,536	1.9%	58.8%
Nights (000)	58,135	58,220	59,497	63,842	68,060	75,548	78,254	84,772	85,533	0.9%	52.4%
Average Length of Stay	25.2	27.1	26.3	26.5	26.3	27.0	24.5	24.4	24.2	-1.0%	-4.0%
Expenditure (\$ billion)	\$5.3	\$5.3	\$5.7	\$6.0	\$6.5	\$7.7	\$8.8	\$9.7	\$9.8	1.1%	83.7%
Spend per visitor per night (\$)	\$95	\$92	\$95	\$95	\$95	\$101	\$113	\$114	\$114	0.2%	20.6%
<b>DOMESTIC OVERNIGHT TRAVEL</b>											
<b>Visitors, Nights and Expenditure</b>											
	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2018 vs. 2017	% change 2018 vs. 2010
Visitors (000)	8,028	8,381	8,551	9,794	9,760	10,618	11,184	11,589	13,379	15.4%	66.7%
Nights (000)	32,592	34,349	35,731	37,741	37,279	38,827	41,334	43,430	49,277	13.5%	51.2%
Average Length of Stay	4.1	4.1	4.2	3.9	3.8	3.7	3.7	3.7	3.7	-1.7%	-9.3%
Expenditure (\$ billion)	\$5.7	\$6.1	\$6.2	\$7.5	\$7.0	\$7.8	\$8.1	\$8.5	\$10.1	18.5%	78.0%
Spend per visitor per night (\$)	\$174	\$177	\$175	\$198	\$187	\$200	\$197	\$196	\$204	4.5%	17.7%
<b>DOMESTIC DAYTRIP TRAVEL</b>											
<b>Visitors, Nights and Expenditure</b>											
	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2018 vs. 2017	% change 2018 vs. 2010
Visitors (000)	9,323	8,798	9,079	10,361	11,303	12,246	12,707	13,465	14,180	5.3%	52.1%
Expenditure (\$ million)	961.5	823.5	990.4	1,094.5	1,180.7	1,123.7	1,162.2	1,359.2	1,452.3	6.9%	51.1%
Spend per visitor (\$)	\$103	\$94	\$109	\$106	\$104	\$92	\$91	\$101	\$102	1.5%	-0.7%