

This snapshot provides a profile of **nature based¹ visitors** to New South Wales in the year ended (YE) September 2016.²

VISITOR MARKET SIZE AND EXPENDITURE

In the YE Sep 16, the total number of International, Domestic overnight and Daytrip nature based visitors to NSW were 26.9 million. Of these, 11.7% were from Overseas, 41.5% were from the Domestic overnight market and 46.8% were Domestic Daytrip visitors. Nature based visitors accounted for 83.6% of International visitors³ to NSW, 38.4% of Domestic overnight visitors and 22.2% of Daytrip visitors to NSW.

Nature based visitors stayed 119.7 million nights and spent \$18.3 billion. International visitors stayed 2x longer than Domestic overnight visitors in terms of median length of stay and hence, the average spend per visitor for International visitors was almost 4x that of Domestic overnight visitors. In terms of average spend per night, Domestic overnight nature based visitors spent 77% 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	3.1	77.9	25 nights	6 nights	8.8	\$2,790	\$113
Domestic Overnight	11.2	41.8	4 nights	3 nights	8.3	\$747	\$200
Domestic Daytrip	12.6	-	-	-	1.1	\$90	-
TOTAL	26.9	119.7			18.3	\$678	\$152

Chart 1. Nature based Visitors to NSW

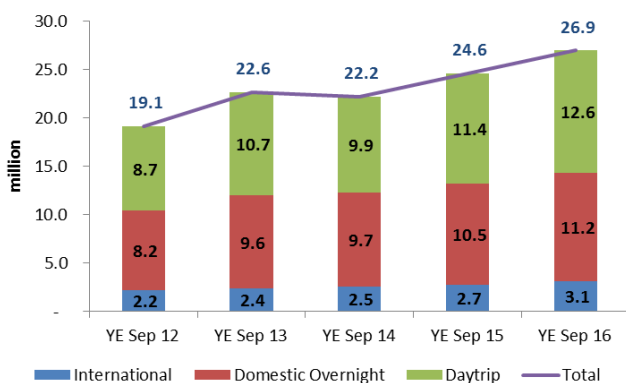
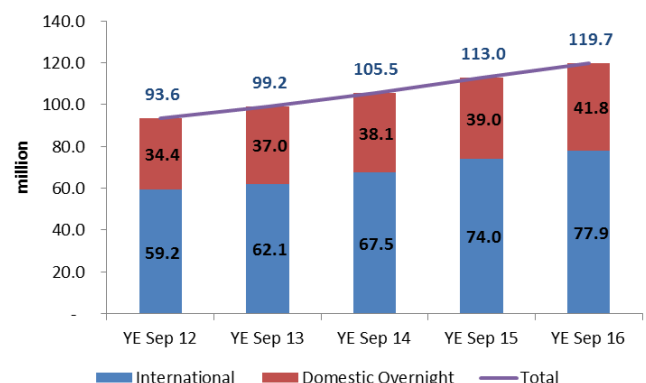


Chart 2. Nature based Visitor Nights in NSW

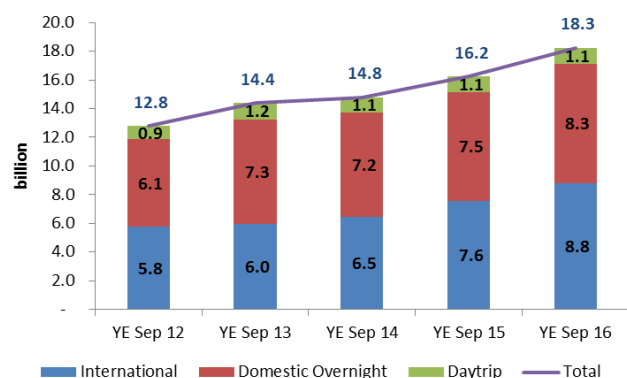


¹ Definition: A nature based visitor participates in at least one of the following activities: bushwalking or rainforest walks; visit national parks or State parks; whale or dolphin watching; visit botanical or other public gardens; visit farms; go to the beach; visit wildlife parks, zoos or aquariums; 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 16, Tourism Research Australia.

³ 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 16, total nature based visitors, nights and expenditure to NSW increased by 9.6%, 6.0% and 12.4% respectively on YE Sep 15. International visitor spend increased the highest (+16%), followed by Domestic overnight spend (+10%).

Compared to YE Sep 12, total nature based visitors, nights and expenditure to NSW grew by 40.9%, 27.9% and 42.9% respectively. In terms of visitors, the number of Domestic day trip visitors grew the most over the five-year period (+45%), followed by International visitors (+42%) and Domestic overnight visitors (+37%). In terms of expenditure, International visitor spend recorded the highest growth (+52%), followed by Domestic overnight spend (+37%).

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	85.4%	64.5%	53.8%
Visit national parks / state parks	65.1%	24.7%	25.9%
Visit botanical or other public gardens	56.0%	12.1%	13.3%
Visit wildlife parks / zoos / aquariums	50.3%	5.2%	4.0%
Bushwalking / rainforest walks	33.8%	27.7%	24.6%
Visit farms	15.1%	5.0%	3.0%
Go whale or dolphin watching	13.0%	1.9%	np
Visit the outback (2005-2015)	2.9%		

In the YE Sep 16, 'Go to the beach' was the most popular activity undertaken by International nature based visitors (85.4%), Domestic overnight nature based visitors (64.5%) and Domestic daytrip nature based visitors (53.8%) to NSW.

The activity 'Go to the beach' was most popular with the youth segment (15 to 29 years) of International nature based visitors (37.6%), Domestic overnight nature based visitors (26.0%) and Domestic daytrip nature based visitors (31.5%) to NSW.

'Visit national parks/state' (65.1%) and 'Visit botanical or other public gardens' (56.0%) 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 (27.7% and 24.7%) and Domestic daytrip (24.6% and 25.9%) nature based visitors to NSW.

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

SOURCE MARKETS

Table 3. Source Markets for International Nature based Visitors

		Visitors		Nights		ALOS
		('000)	% Share	('000)	%	nights
1	China	602.5	19.2%	13,796.3	17.7%	22.9
2	USA	359.9	11.4%	4,829.8	6.2%	13.4
3	UK	336.0	10.7%	7,678.8	9.9%	22.9
4	New Zealand	226.9	7.2%	3,131.4	4.0%	13.8
5	Korea	182.7	5.8%	5,760.5	7.4%	31.5
	Other Asia markets	721.4	22.9%	21,913.1	28.1%	30.4
	Other European markets	457.9	14.6%	12,329.0	15.8%	26.9
	All other countries	257.7	8.2%	8,506.7	10.9%	33.0
	Total	3,145.0	100%	77,945.6	100%	24.8

In the YE Sep 2016, China (19.2%) was the largest source of International nature based visitors to the State, followed by USA (11.4%) and UK (10.7%). Over 90% of Chinese visitors to NSW participated in nature based activities during their trip.

Compared to YE Sep 15, the nature based visitors to NSW grew by 14.5%. Over the same period, China, USA and Korea grew by 23.7%, 24.2% and 27.5%, respectively.

China (17.7%) was also the largest source market in terms of International nature based visitor nights in the State, followed by UK (9.9%) and Korea (7.4%). International nature based visitors stayed an average of 24.8 nights in NSW.

Since YE Sep 2012, China had 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	35.0%	55.3%
Regional NSW	30.7%	33.9%
Total Intrastate	65.7%	89.2%
Total Interstate	34.3%	10.8%
Total	100.0%	100.0%

In the YE Sep 16, Sydney was the largest source of Domestic overnight nature based visitors (35.0%) and Domestic daytrip nature based visitors (55.3%) to the state. A 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	35.6%	25.3%	30.4%
30-39	18.2%	17.8%	18.5%
40-49	13.2%	17.9%	18.2%
50-59	15.0%	18.0%	15.9%
60+	18.0%	21.0%	17.1%

In the YE Sep 16, the youth market (15-29 years) was the largest age group among International nature based visitors (35.6%), Domestic overnight nature based visitors (25.3%), and Domestic daytrip nature based visitors (30.4%) 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	46.3%	17.4%
Adult Couple	22.9%	28.3%
Family Group	13.6%	24.3%
Friends or relatives	14.3%	27.3%
Other	3.0%	2.6%

In the YE Sep 16, International nature based visitors to NSW mostly travelled 'Alone' (46.3%), followed by travel by 'Adult couple' (22.9%). Amongst Domestic overnight nature based visitors, 'Adult Couple' was the most common travel party (28.3%), closely followed by travelling with 'Friends or relatives' (27.3%).

In the last 5 years, travelling 'Alone' has been the most common travel party amongst International nature based visitors to NSW. From YE Sep 2012 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	93.7%	19.5%	28.6%
North Coast NSW	9.8%	26.4%	15.3%
Hunter	4.5%	10.4%	11.2%
South Coast	4.1%	19.0%	19.7%
Blue Mountains	3.4%	4.6%	10.4%
Central Coast	1.4%	6.2%	6.0%
Central NSW	1.2%	4.2%	np
New England North West	0.9%	2.6%	np
Riverina	0.8%	1.1%	np
Capital Country	0.7%	3.1%	3.2%
The Murray	0.6%	2.0%	np
Snowy Mountains	0.6%	3.2%	np
Outback NSW	0.3%	1.1%	np

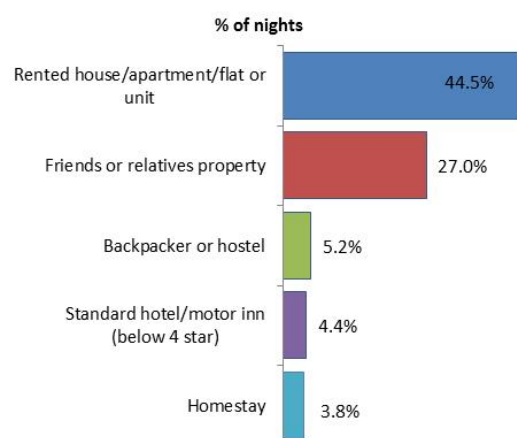
In the YE Sep 2016, 'Sydney' was the most visited region in NSW by International nature based visitors (93.7%) and Domestic daytrip nature based visitors (28.6%), while 'North Coast' was the most visited region in NSW (26.4%) by Domestic overnight nature based visitors.

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

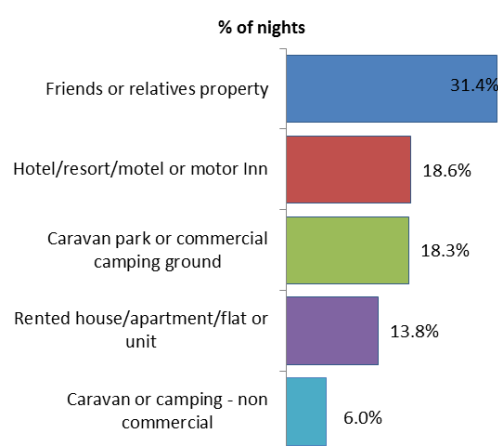
Chart 4. Most Popular Accommodation type for International Visitors



In the YE Sep 2016, 'Rented house/apartment/flat or unit' (44.5%) was the most popular accommodation type used by International nature based visitors in NSW. 'Friends or relatives property' (27.0%) was the 2nd most popular, followed by 'Backpacker or hostel' (5.2%), 'Standard hotel/motor inn (below 4 star)' (4.4%) and 'Homestay' (3.8%).

Since YE Sep 2012, '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

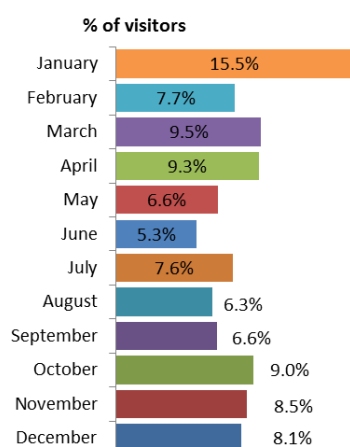


In the YE Sep 2016, 'Friends or relatives property' (31.4%) was the most popular accommodation type used by Domestic overnight nature based visitor in NSW. 'Hotel/resort/motel or motor Inn' (18.6%) was the 2nd most popular, followed by 'Caravan park or commercial camping ground' (18.3%).

Since YE Sep 2012, '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 16, over 1/8 of Domestic overnight nature based visitors to NSW returned from their trip in January, while June (5.3%) had the lowest percentage of those who returned from their trip.

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. Months with the lowest percentage of those returned from their trip varied among May, June and August.

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/>.