

Nature Based Tourism to NSW

Year ended December 2010



Definition^{(1) (2)}

Nature based visitors participate 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 the outback (international visitors only).

⁽¹⁾ These visitors may also participate in other activities.

⁽²⁾ This activity list has some variations from the definition used by Tourism Research Australia.

Overview

NSW received 18.4 million international⁽³⁾ and domestic⁽⁴⁾ nature based visitors - up by 1.6% on YE Dec 09. Visitors spent 87.3 million nights in the State - up by 1.7% on YE Dec 09.

Nature based visitors to NSW spent \$14.6 billion (excl package tours and prepaid international airfares by overseas visitors) during their trip in Australia - down by 2.2% on YE Dec 09.

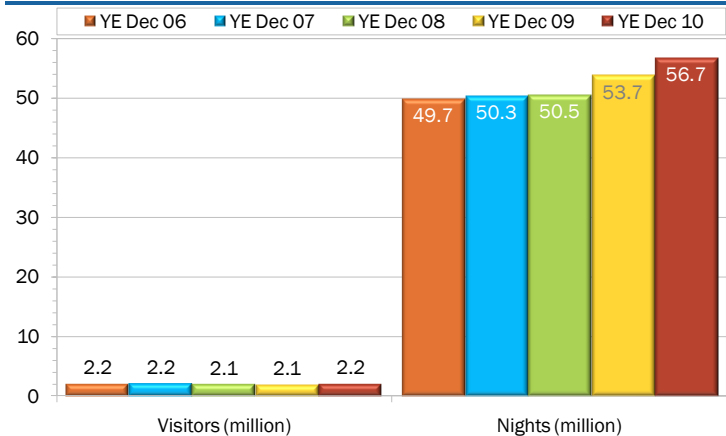
⁽³⁾ Source: International Visitor Survey, YE Dec 10, Tourism Research Australia

⁽⁴⁾ Source: National Visitor Survey, YE Dec 10, Tourism Research Australia

International Market⁽³⁾

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 nearly 2.2 million international nature based visitors - up by 5.1% on YE Dec 09. They spent 56.7 million nights in the State - up by 5.5% on YE Dec 09.

Between YE Dec 06 and YE Dec 10, nature based visitors to NSW experienced an average annual decline of 0.3%.

Market share

Nature based travellers represented 76.9% of visitors and 86.9% of nights by all international travellers to NSW. The State received 55.0% of visitors and 34.7% of nights by nature based travellers in Australia.

Return visitors

Over 2/5 (44.6%) 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 (52.8%).

Origin

Market	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
New Zealand	194	8.9%	2,752	4.9%	14.2
Korea	151	6.9%	6,086	10.7%	40.4
China	251	11.5%	8,661	15.3%	34.6
Other Asian markets (5)	446	20.4%	14,272	25.2%	32.0
USA	233	10.7%	3,260	5.8%	14.0
United Kingdom	320	14.7%	6,674	11.8%	20.8
Other European markets (6)	388	17.8%	9,304	16.4%	24.0
All other countries	201	9.2%	5,653	10.0%	28.2
Total	2,183		56,661		26.0

Other Asian markets⁽⁵⁾ (20.4%) was the largest source of international nature based visitors to NSW, followed by other European markets⁽⁶⁾ (17.8%).

Other Asian markets⁽⁵⁾ (25.2%) was the biggest contributor of nights in the State, followed by other European markets⁽⁶⁾ (16.4%).

⁽⁵⁾ All Asian markets, excluding Korea and China.

⁽⁶⁾ All European markets, excluding United Kingdom.

Average stay

International nature based visitors stayed an average of 26 nights in NSW. This was longer than the average for all visitors to the State (23 nights).

Nature based visitors from India (51.7 nights) had the longest average stay in NSW, followed by visitors from other Asia (45.9 nights).

Accommodation

'Rented house / apartment / unit / flat' (41.4%) was the most popular accommodation type used for international nature based nights in NSW, followed by 'home of a friend or relative' (28.4%) and 'backpacker / hostel' (7.7%).

Expenditure⁽⁷⁾

International nature based visitors to NSW spent \$8.5 billion (excl package expenditure) during their trip to Australia - down by 1.6% on YE Dec 09. On average, visitors who had been to NSW spent \$3,901 per visitor and \$150 per night.

⁽⁷⁾ Excluding package tours and prepaid international airfares.

Type of nature based activity

Nature based activity	Visitors	
	('000)	%
Go to the beach	1,836	84.1%
Visit national parks / State parks	1,379	63.2%
Visit botanical or other public gardens	1,198	54.9%
Bushwalking / rainforest walks	815	37.3%
Visit farms	343	15.7%
Go whale or dolphin watching	285	13.1%
Visit the outback	274	12.5%
Average number of nature based activities	2.8	

'Go to the beach' (84.1%) was the most popular nature based activity undertaken by international visitors who had been to NSW. 'Visit national or State parks' (63.2%) was the 2nd most popular nature based activity.

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International Market continued

Destinations in NSW

Region	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
South Coast sub-region	63	93.0%	-	-	-
Illawarra sub-region	49	90.0%	1,511	95.7%	31.0
Sydney	2,050	77.1%	47,061	86.4%	23.0
Snowy Mountains	19	90.8%	-	-	-
Capital Country	23	85.2%	-	-	-
The Murray	13	78.9%	-	-	-
Riverina	19	83.1%	-	-	-
Central NSW	26	72.0%	-	-	-
The Hunter	112	83.1%	1,957	84.0%	17.5
Mid North Coast	146	95.3%	825	94.5%	5.6
Northern Rivers	228	96.7%	1,958	96.6%	8.6
New England North West	33	87.5%	-	-	-
Outback NSW	10	86.6%	-	-	-
Central Coast	30	85.1%	-	-	-
Blue Mountains	78	96.4%	-	-	-
Lord Howe Island	-	-	-	-	-

- = estimate considered statistically unreliable

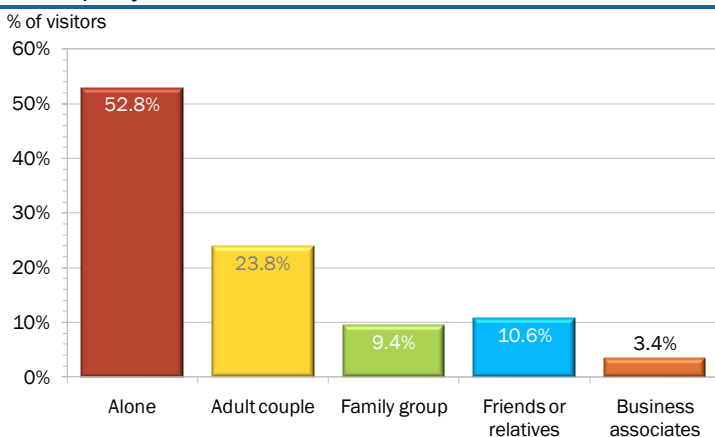
'Northern Rivers' (96.7%) had the highest proportion of international visitors who engaged in a nature based activity. 'Blue Mountains' (96.4%) had the 2nd highest proportion, followed by 'Mid North Coast' (95.3%).

'Northern Rivers' (96.6%) had the highest proportion of nights spent by nature based visitors, followed by 'Illawarra sub-region' (95.7%) and 'Mid North Coast' (94.5%).

Transport

'Aircraft' (34.6%) was the most common transport used to destinations in NSW by international nature based visitors. 'Private or company car' (27.9%) was the 2nd most common, followed by 'taxi or chauffeur driven hire car' (15.6%).

Travel party

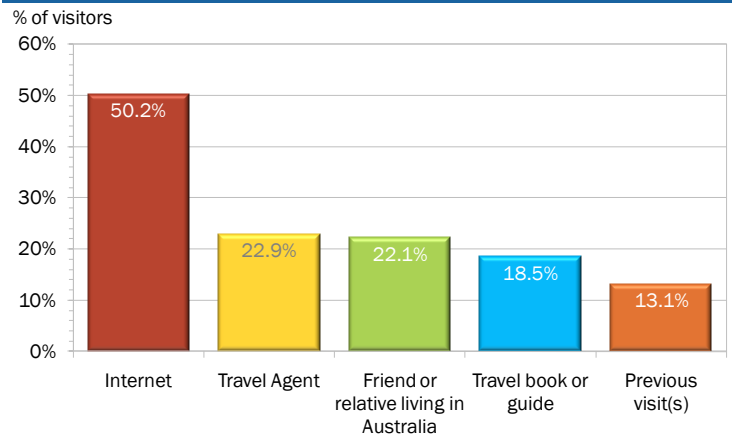


'Alone' (52.8%) was the most common travel party of international nature based visitors to NSW. 'Adult couple' (23.8%) was the 2nd most common travel party, followed by 'friends and relatives' (10.6%).

Package tours

Nearly 1/4 (24.0%) of international nature based visitors to NSW, arrived in Australia on a travel package. 'All accommodation' (82.1%) was the most popular travel arrangement included in the package (other than 'international airfares'), followed by 'airfares within Australia' (65.9%).

Information sources



The 'internet' (50.2%) was the most popular information source for the trip to Australia by nature based visitors who had been to NSW. 'Travel agent' (22.9%) was the 2nd most popular, followed by 'friend or relative living in Australia' (22.1%).

Of those international nature based visitors to NSW, who had used the internet for this visit to Australia, over 1/2 (53.2%) had booked at least part of the trip on the internet.

Group tours

The rate of group tour travel to Australia amongst international nature based visitors who had been to NSW was 13.4%.

Seasonality

NSW received the most international nature based visitors in the March quarter (29.5%) and the least in the June quarter (19.1%).

Nature based visitors to the State spent the most nights in the March quarter (33.5%) and the least in the June quarter (19.0%).

Age

	15-24 years	25-34 years	35-44 years	45-54 years	55-65 years	65 years+
Nature based activity	%	%	%	%	%	%
Go to the beach	22.6%	27.4%	15.1%	15.0%	13.2%	6.7%
Visit national parks / State parks	20.6%	26.6%	14.6%	15.9%	14.5%	7.7%
Visit botanical or other public gardens	21.2%	27.0%	14.2%	15.5%	14.5%	7.6%
Go whale or dolphin watching	26.1%	28.2%	13.6%	13.4%	15.1%	3.5%
Visit the outback	25.2%	29.3%	12.2%	12.1%	12.6%	8.6%
Visit farms	24.5%	24.0%	14.9%	16.3%	14.3%	6.1%
Bushwalking / rainforest walks	22.2%	27.9%	14.4%	14.6%	13.5%	7.3%
All nature based visitors	20.7%	26.4%	15.3%	16.1%	14.2%	7.4%

Aged '25-34 years' (26.4%) was the biggest age group of international nature based visitors to NSW. '15-24 years' (20.7%) was the 2nd biggest, followed by '45-54 years' (16.1%).

'25-34 years' was the largest age group for each type of nature based activity, except for 'visit farms'.

Nature Based Tourism to NSW

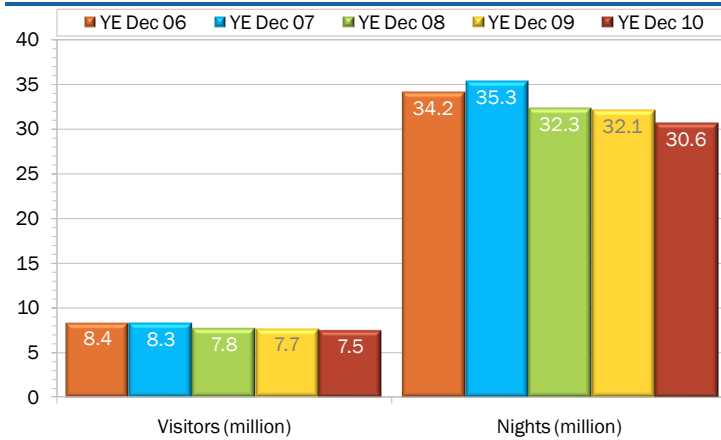
Year ended December 2010



Domestic Market⁽⁴⁾

The information in this section relates to domestic visitors who engaged in a nature based activity in NSW.

Visitors and nights



NSW received 7.5 million domestic nature based overnight visitors - down by 2.8% on YE Dec 09. They spent 30.6 million nights in the State - down by 4.6% on YE Dec 09.

Between YE Dec 06 and YE Dec 10, nature based overnight visitors to NSW experienced an average annual decline of 2.7%.

Market share

Nature based travellers represented 32.7% of visitors and 39.3% of nights by domestic overnight travellers to NSW. The State received 33.6% of visitors and 26.4% of nights by nature based travellers in Australia.

Expenditure

Domestic nature based overnight visitors to NSW spent \$5.2 billion (incl airfares and transport costs) during their trip - down by 4.3% on YE Dec 09. On average, visitors spent \$697 per visitor and \$171 per night in the State.

Seasonality

The March quarter (35.1%) had the most domestic nature based overnight visitors to NSW. The March quarter (40.8%) also attracted the most nights in the State.

Origin

Market	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
Regional NSW	2,490	33.2%	9,011	29.4%	3.6
Sydney	2,794	37.2%	10,569	34.5%	3.8
Intrastate	5,285	70.5%	19,581	63.9%	3.7
Victoria	763	10.2%	4,800	15.7%	6.3
Queensland	835	11.1%	3,431	11.2%	4.1
ACT	369	4.9%	1,238	4.0%	3.4
Other interstate	250	3.3%	1,581	5.2%	6.3
Total interstate	2,217	29.6%	11,049	36.1%	5.0
Total	7,501	100.0%	30,629		4.1

NSW received 70.5% of domestic nature based overnight visitors from intrastate and 29.6% from interstate. Sydney (37.2%) was the biggest source market, while Queensland (11.1%) was the biggest interstate market.

Intrastate contributed 63.9% of nature based visitor nights in the State, while interstate contributed 36.1%. Sydney (34.5%) was the biggest source market, while Victoria (15.7%) was the biggest interstate market.

Destinations in NSW

Region	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
South Coast sub-region	1,189	61.8%	5,368	69.0%	4.5
Illawarra sub-region	413	47.6%	1,356	56.9%	3.3
Sydney	1,223	17.1%	4,799	23.6%	3.9
Snowy Mountains	216	31.9%	945	38.4%	4.4
Capital Country	204	21.9%	519	23.9%	2.5
The Murray	112	13.9%	696	28.4%	6.2
Riverina	107	11.1%	-	-	-
Central NSW	245	15.5%	832	19.4%	3.4
The Hunter	436	21.9%	1,264	24.8%	2.9
Mid North Coast	1,628	53.0%	7,269	61.8%	4.5
Northern Rivers	864	47.4%	3,565	56.2%	4.1
New England North West	223	17.1%	768	20.3%	3.4
Outback NSW	78	18.0%	-	-	-
Central Coast	509	45.0%	1,808	54.0%	3.6
Blue Mountains	291	45.3%	670	43.8%	2.3
Lord Howe Island	-	-	-	-	-
- = estimate considered statistically unreliable					

'South Coast sub-region' (61.8%) had the highest proportion of domestic overnight visitors who engaged in a nature based activity. 'Mid North Coast' (53.0%) had the 2nd highest proportion, followed by 'Illawarra sub-region' (47.6%).

'South Coast sub-region' (69.0%) had the highest proportion of nights spent by nature based visitors, followed by 'Mid North Coast' (61.8%) and 'Illawarra sub-region' (56.9%).

Average stay

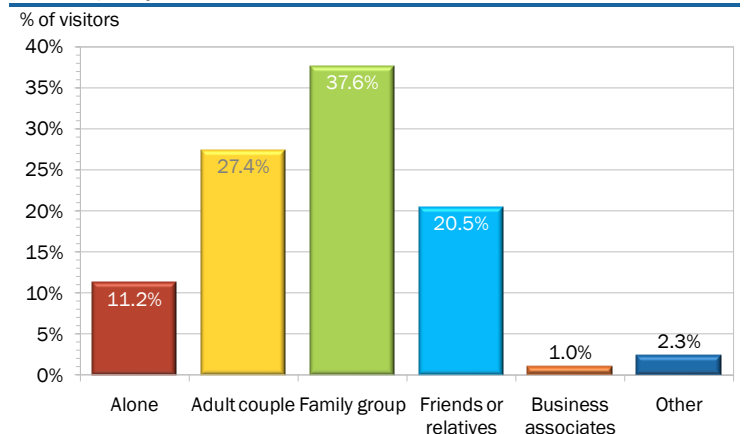
Domestic nature based visitors stayed, on average, 4.1 nights in NSW. This was longer than the average for all visitors to the State (3.4 nights).

Interstate visitors to NSW stayed 1.3 nights longer than intrastate visitors (5.0 vs 3.7 nights).

Accommodation

'Friends or relatives property' (31.8%) was the most popular accommodation type used for domestic nature based visitor nights in NSW. 'Caravan park or commercial camping ground' (19.3%) was the 2nd most popular accommodation type used, followed by 'rented house, apartment, flat or unit' (16.9%).

Travel party



'Family group' (37.6%) was the most common travel party of domestic nature based overnight visitors to NSW. 'Adult couple' (27.4%) was the 2nd most common travel party, followed by 'friends or relatives' (20.5%).

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Domestic Market continued

Age

Nature based activity	15-24	25-34	35-44	45-54	55-65	65
	years	years	years	years	years	years+
Go to the beach	18.6%	14.7%	23.1%	18.4%	15.2%	10.0%
Visit national parks or State parks	15.5%	14.8%	24.4%	18.2%	14.3%	12.8%
Visit botanical or other public gardens	13.9%	11.8%	19.0%	17.5%	18.2%	19.5%
Go whale or dolphin watching	18.1%	13.4%	21.5%	15.4%	13.4%	17.4%
Visit farms	13.6%	16.3%	18.7%	20.5%	13.6%	16.9%
Bushwalking or rainforest walks	16.9%	14.0%	22.8%	20.8%	16.6%	8.9%
All nature based visitors	17.9%	14.5%	22.9%	17.6%	15.7%	11.5%

Aged '35-44 years' (22.9%) was the biggest age group of domestic nature based overnight visitors to NSW. '15-24 years' (17.9%) was the 2nd biggest age group, followed by '44-54 years' (17.6%).

'35-44 years' was the largest age group for each type of nature based activity, except for 'visit botanical gardens or other public gardens' and 'visit farms'.

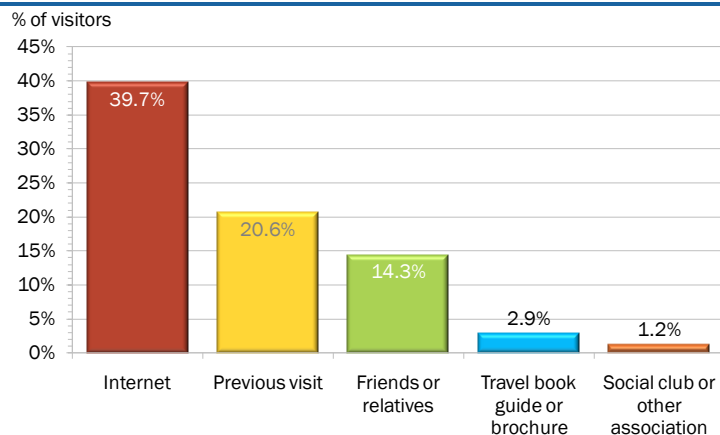
Transport

'Private or company vehicle' (83.2%) was the most common transport used to destinations in NSW by domestic nature based overnight visitors. 'Air transport' (10.5%) was the 2nd most common, followed by 'bus or coach' (2.5%).

Package tours

Only 2.2% of domestic nature based overnight visitors to NSW, travelled on a package tour. 'Accommodation' (98.8%) was the most popular travel arrangement included in the package, followed by 'bus or coach' (71.4%).

Information sources



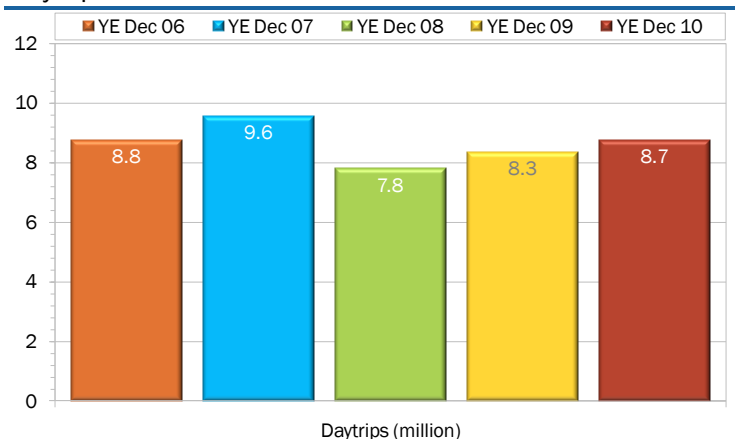
The 'internet' (39.7%) was the most popular information source for the trip in Australia by domestic nature based overnight visitors who had been to NSW. 'Previous visit' (20.6%) was the 2nd most popular, followed by 'friends or relatives' (14.3%).

Type of nature based activity

Nature based activity	Visitors	
	('000)	%
Go to the beach	4,841	64.5%
Bushwalking or rainforest walks	2,136	28.5%
Visit national parks or State parks	1,794	23.9%
Visit botanical or other public gardens	693	9.2%
Visit farms	337	4.5%
Go whale or dolphin watching	149	2.0%
Average number of nature based activities	1.3	

'Go to the beach' (64.5%) was the most popular nature based activity undertaken by domestic overnight visitors to NSW. 'Bushwalking or rainforest walks' (28.5%) was the 2nd most popular nature based activity, followed by 'visit national parks or State parks' (23.9%).

Daytrips



NSW received 8.7 million domestic nature based daytrip visitors - up by 4.8% on YE Dec 09.

Between YE Dec 06 and YE Dec 10, nature based daytrip visitors to NSW experienced a marginal average annual decline.

Market share - daytrips

Nature based day-trippers represented 17.8% of domestic daytrip visitors to NSW. The State received 34.3% of nature based daytrip travellers in Australia.

Expenditure on daytrips

Domestic nature based daytrip visitors to NSW spent \$873 million during their trip - up by 6.2% on YE Dec 09. On average, visitors spent \$100 per trip in NSW.

Type of nature based activity on daytrips

'Go to the beach' (56.1%) was the most popular nature based activity undertaken by domestic daytrip visitors to NSW. 'Visit national parks or State parks' (21.0%) was the 2nd most popular nature based activity, followed by 'bushwalking or rainforest walks' (19.1%).

Image reference

Photographs (in order of appearance on each page): Skywalk at Dorrigo National Park, Hamilton Lund; Fivebough Wetlands, Leeton, Paul Foley; Bald Rock National Park, Paul Foley; Dorrigo National Park, Hamilton Lund.