

# Nature Based Tourism to NSW

## Year ended December 2009



### Definition

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). Note: These visitors may also participate in other activities.

### Overview

NSW received 18.1 million international<sup>(1)</sup> and domestic<sup>(2)</sup> nature based visitors - up by 2.4% on YE Dec 08. Visitors spent 85.8 million nights in the State - up by 3.6% on YE Dec 08.

Nature based visitors to NSW spent \$14.9 billion (excl package tours and prepaid international airfares by overseas visitors) during their trip in Australia - up by 3.6% on YE Dec 08.

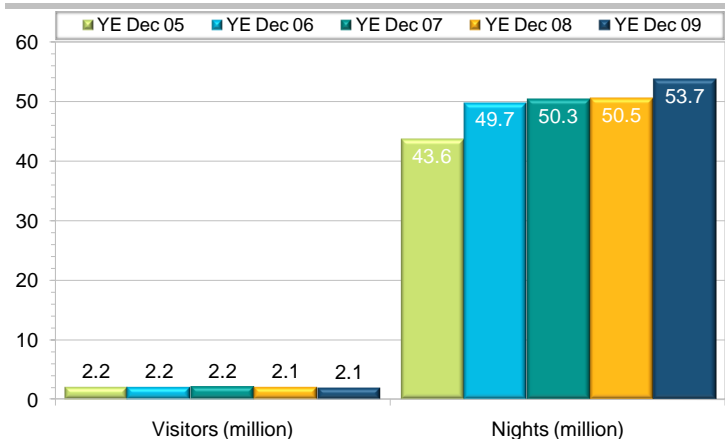
<sup>(1)</sup> Source: International Visitor Survey, YE Dec 09, Tourism Research Australia

<sup>(2)</sup> Source: National Visitor Survey, YE Dec 09, Tourism Research Australia

### International Market<sup>(1)</sup>

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 2.1 million international nature based visitors - down by 3.1% on YE Dec 08. They spent 53.7 million nights in the State - up by 6.4% on YE Dec 08.

Between YE Dec 05 and YE Dec 09, nature based visitors to NSW experienced an average annual decline of 1.6%.

#### Market share

Nature based travellers represented 76.6% of visitors and 87.7% of nights by all international travellers to NSW.

The State received 54.6% of visitors and 34.5% of nights by nature based travellers in Australia.

#### Return visitors

Over 2/5 (43.9%) 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 (52.0%).

### Origin

Market	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
New Zealand	186	9.0%	2,565	4.8%	13.8
Korea	121	5.8%	5,308	9.9%	43.8
China	205	9.9%	7,383	13.7%	36.1
Other Asian markets (3)	402	19.4%	12,247	22.8%	30.4
USA	242	11.6%	3,519	6.6%	14.5
United Kingdom	336	16.2%	7,093	13.2%	21.1
Other European markets (4)	391	18.8%	9,944	18.5%	25.4
All other countries	194	9.3%	5,665	10.5%	29.3
<b>Total</b>	<b>2,078</b>		<b>53,725</b>		<b>25.9</b>

Other Asian markets<sup>(3)</sup> (19.4%) was the largest source of international nature based visitors to NSW, followed by other European markets<sup>(4)</sup> (18.8%).

Other Asian markets<sup>(3)</sup> (22.8%) was the biggest contributor of nights in the State, followed by other European markets<sup>(4)</sup> (18.5%).

<sup>(3)</sup> All Asian markets, excluding Korea and China.

<sup>(4)</sup> All European markets, excluding United Kingdom.

#### Average stay

International nature based visitors stayed an average of 25.9 nights in NSW. This was longer than the average for all visitors to the State (22.6 nights).

Nature based visitors from other Asia (53.6 nights) had the longest average stay in NSW, followed by visitors from Thailand (49.3 nights).

#### Accommodation

'Rented house / apartment / unit / flat' (42.7%) was the most popular accommodation type used for international nature based nights in NSW. 'Home of a friend or relative' (24.2%) was the 2<sup>nd</sup> most popular accommodation type used, followed by 'backpacker / hostel' (8.3%).

#### Expenditure<sup>(5)</sup>

International nature based visitors to NSW spent \$8.7 billion (excl package expenditure) during their trip to Australia - up by 3.1% on YE Dec 08. On average, visitors who had been to NSW spent \$4,166 per visitor and \$161 per night.

<sup>(5)</sup> Excluding package tours and prepaid international airfares.

#### Type of nature based activity

Nature based activity	Visitors	
	('000)	%
Go to the beach	1,771	85.2%
Visit national parks / State parks	1,327	63.9%
Visit botanical or other public gardens	1,164	56.0%
Bushwalking / rainforest walks	807	38.8%
Visit farms	303	14.6%
Visit the outback	299	14.4%
Go whale or dolphin watching	271	13.1%
Average number of nature based activities	2.9	

'Go to the beach' (85.2%) was the most popular nature based activity undertaken by international visitors who had been to NSW. 'Visit national or State parks' (63.9%) was the 2<sup>nd</sup> most popular nature based activity.

# Nature Based Tourism to NSW

## Year ended December 2009



### International Market continued

#### Destinations in NSW

Region	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
South Coast	62	95.5%	-	-	-
Illawarra	48	92.6%	1,313	91.7%	27.4
Sydney	1,947	76.3%	45,391	86.9%	23.3
Snowy Mountains	16	93.4%	-	-	-
Capital Country	17	82.9%	-	-	-
The Murray	12	81.3%	-	-	-
Riverina	21	84.8%	-	-	-
Central NSW	32	81.9%	-	-	-
The Hunter	103	89.5%	1,570	91.4%	15.3
Mid North Coast	146	96.8%	-	-	-
Northern Rivers	229	98.4%	1,798	98.9%	7.9
New England North West	45	90.4%	-	-	-
Outback NSW	14	95.8%	-	-	-
Central Coast	30	90.1%	-	-	-
Blue Mountains	68	96.7%	-	-	-
Lord Howe Island	-	-	-	-	-

- = estimate considered statistically unreliable

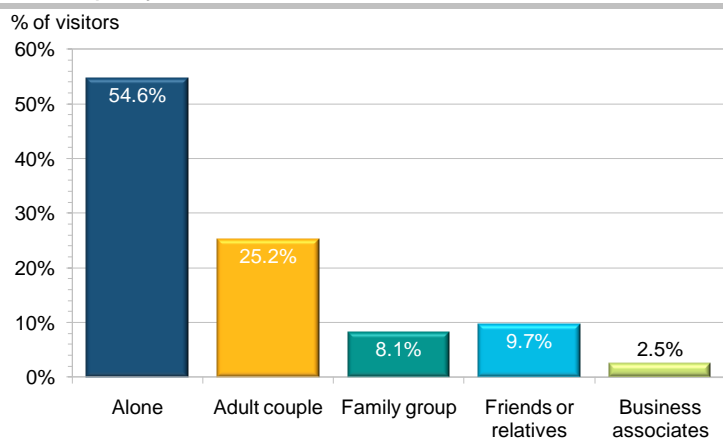
'Northern Rivers' (98.4%) had the highest proportion of international visitors who engaged in a nature based activity. 'Mid North Coast' (96.8%) had the 2<sup>nd</sup> highest proportion, followed by 'Blue Mountains' (96.7%).

'Northern Rivers' (98.9%) had the highest proportion of nights spent by nature based visitors, followed by 'Illawarra' (91.7%) and 'The Hunter' (91.4%).

#### Transport

'Aircraft' (32.8%) was the most common transport used to destinations in NSW by international nature based visitors. 'Private or company car' (28.7%) was the 2<sup>nd</sup> most common, followed by 'taxi or chauffeur driven hire car' (17.3%).

#### Travel party

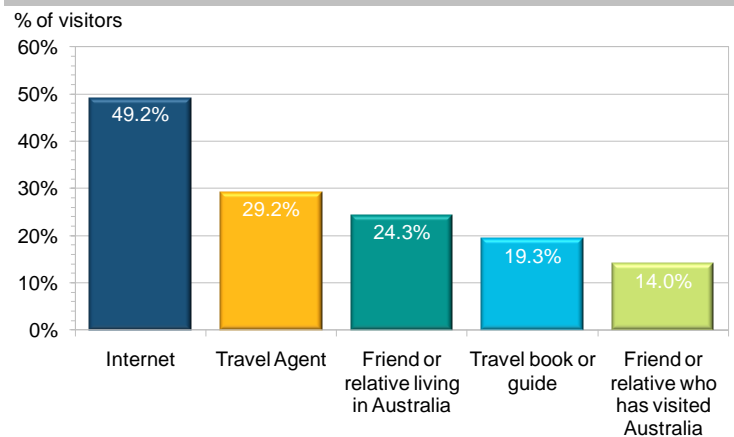


'Alone' (54.6%) was the most popular travel party of international nature based visitors to NSW. 'Adult couple' (25.2%) was the 2<sup>nd</sup> most popular travel party, followed by 'friends and relatives' (9.7%).

#### Package tours

Over 1/5 (21.7%) of international nature based visitors to NSW, arrived in Australia on a travel package. 'All accommodation' (80.8%) was the most popular travel arrangement included in the package (other than 'international airfares').

#### Information sources



The 'internet' (49.2%) was the most popular information source for the trip to Australia by nature based visitors who had been to NSW. 'Travel agent' (29.2%) was the 2<sup>nd</sup> most popular, followed by 'friend or relative living in Australia' (24.3%).

Of those international nature based visitors to NSW, who had used the internet for this visit to Australia, over 1/2 (54.5%) 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 12.6%.

#### Seasonality

NSW received the most international nature based visitors in the December quarter (30.3%) and the least in the June quarter (19.1%).

Nature based visitors to the State spent the most nights in the March quarter (34.4%) and the least in the June quarter (18.3%).

#### Age

Nature based activity	15-24 years	25-34 years	35-44 years	45-54 years	55-65 years	65 years+
	%	%	%	%	%	%
Go to the beach	24.0%	27.4%	13.7%	14.9%	14.0%	6.1%
Visit national parks / State parks	22.1%	27.0%	13.3%	15.0%	15.6%	6.9%
Visit botanical or other public gardens	22.2%	27.1%	13.0%	14.4%	16.0%	7.2%
Go whale or dolphin watching	28.4%	32.2%	12.0%	12.6%	10.5%	4.4%
Visit the outback	26.3%	29.7%	10.4%	11.4%	13.5%	8.7%
Visit farms	26.0%	27.5%	12.9%	14.6%	13.3%	5.6%
Bushwalking / rainforest walks	24.3%	29.2%	12.1%	12.9%	15.0%	6.4%
All nature based visitors	22.0%	26.4%	14.1%	15.4%	15.3%	6.8%

Aged '25-34 years' (26.4%) was the biggest age group of international nature based visitors to NSW. '15-24 years' (22.0%) was the 2<sup>nd</sup> biggest, followed by '45-54 years' (15.4%).

'25-34 years' was the largest age group for each type of nature based activity, while '15-24 years' was the 2<sup>nd</sup> largest.

# Nature Based Tourism to NSW

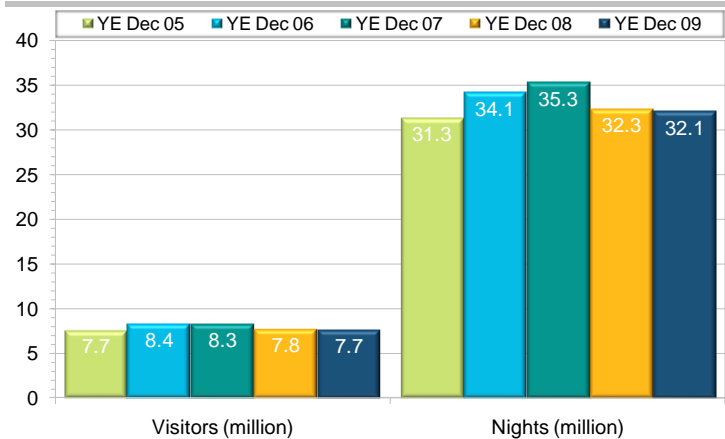
## Year ended December 2009



### Domestic Market<sup>(2)</sup>

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

#### Visitors and nights



NSW received 7.7 million domestic nature based overnight visitors - down by 0.8% on YE Dec 08. They spent 32.1 million nights in the State - down by 0.7% on YE Dec 08.

Between YE Dec 05 and YE Dec 09, nature based overnight visitors to NSW experienced an average annual growth of 0.2%.

#### Market share

Nature based travellers represented 34.2% of visitors and 42.0% of nights by domestic overnight travellers to NSW. The State received 34.1% of visitors and 27.3% of nights by nature based travellers in Australia.

#### Expenditure

Domestic nature based overnight visitors to NSW spent \$5.5 billion (incl airfares and transport costs) during their trip - up by 5.2% on YE Dec 08.

On average, visitors spent \$708 per visitor and \$170 per night in the State.

#### Origin

Market	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
Regional NSW	2,383	30.9%	9,000	28.0%	3.8
Sydney	2,995	38.8%	11,338	35.3%	3.8
Intrastate	5,378	69.7%	20,338	63.4%	3.8
Victoria	755	9.8%	4,674	14.6%	6.2
Queensland	945	12.3%	4,121	12.8%	4.4
ACT	429	5.6%	1,702	5.3%	4.0
Other interstate	207	2.7%	1,255	3.9%	6.1
Total Interstate	2,336	30.3%	11,752	36.6%	5.0
Total	7,714	100.0%	32,090		4.2

NSW received 69.7% of domestic nature based overnight **visitors** from intrastate and 30.3% from interstate. Sydney (38.8%) was the biggest source market, while Queensland (12.3%) was the biggest interstate market.

Intrastate contributed 63.4% of nature based visitor **nights** in the State, while interstate contributed 36.6%. Sydney (35.3%) was the biggest source market, while Victoria (14.6%) was the biggest interstate market.

### Destinations in NSW

Region	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
South Coast	1,264	60.5%	5,367	66.8%	4.2
Illawarra	392	49.5%	1,314	58.2%	3.4
Sydney	1,288	18.9%	4,998	26.2%	3.9
Snowy Mountains	248	39.6%	965	43.4%	3.9
Capital Country	195	21.7%	565	27.4%	2.9
The Murray	80	10.1%	612	24.9%	7.7
Riverina	101	10.8%	-	-	-
Central NSW	292	18.5%	896	22.0%	3.1
The Hunter	463	23.3%	1,547	29.1%	3.3
Mid North Coast	1,528	52.2%	7,087	60.6%	4.6
Northern Rivers	844	51.3%	4,321	64.2%	5.1
New England North West	285	22.5%	1,000	26.1%	3.5
Outback NSW	55	13.6%	-	-	-
Central Coast	549	47.3%	1,968	55.7%	3.6
Blue Mountains	292	51.9%	716	54.9%	2.5
Lord Howe Island	-	-	-	-	-

- = estimate considered statistically unreliable

'South Coast' (60.5%) had the highest proportion of domestic overnight visitors who engaged in a nature based activity. 'Mid North Coast' (52.2%) had the 2<sup>nd</sup> highest proportion, followed by 'Blue Mountains' (51.9%).

'South Coast' (66.8%) had the highest proportion of nights spent by nature based visitors, followed by 'Northern Rivers' (64.2%) and 'Mid North Coast' (60.8%).

#### Average stay

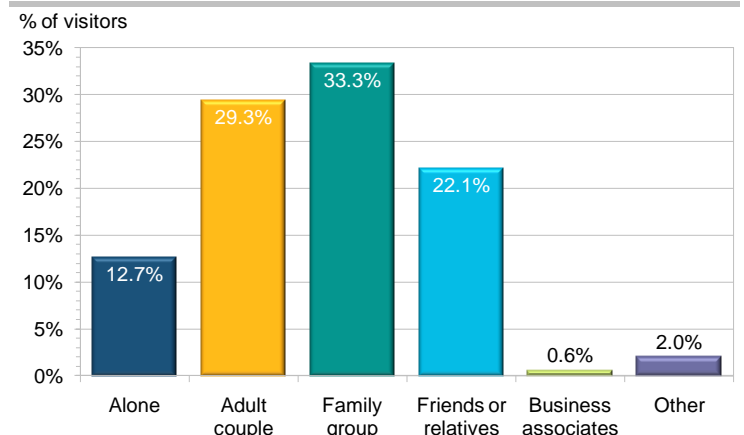
Domestic nature based visitors stayed, on average, 4.2 nights in NSW. This was longer than the average for all visitors to the State (3.4 nights).

Interstate visitors to NSW stayed 1.2 nights longer than intrastate visitors (5.0 vs 3.8 nights).

#### Accommodation

'Friends or relatives property' (33.1%) was the most popular accommodation type used for domestic nature based visitor nights in NSW. 'Caravan park or commercial camping ground' (17.9%) was the 2<sup>nd</sup> most popular accommodation used type used, followed by 'rented house, apartment, flat or unit' (17.5%).

#### Travel party



'Family group' (33.3%) was the biggest travel party of domestic nature based overnight visitors to NSW. 'Adult couple' (29.3%) was the 2<sup>nd</sup> biggest travel party, followed by 'friends or relatives' (22.1%).



### 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	18.8%	15.0%	24.1%	16.5%	14.7%	10.8%
Visit national parks or State parks	13.7%	13.3%	24.9%	17.1%	17.8%	13.3%
Visit botanical or other public gardens	6.4%	11.6%	25.2%	19.5%	17.1%	20.4%
Go whale or dolphin watching	8.9%	7.1%	29.6%	21.9%	19.5%	12.4%
Visit farms	8.6%	9.1%	28.9%	22.1%	17.7%	13.6%
Bushwalking or rainforest walks	12.7%	13.9%	27.1%	19.0%	16.5%	10.8%
All nature based visitors	16.8%	14.1%	24.6%	17.0%	15.6%	11.9%

Aged '35-44 years' (24.6%) was the biggest age group of domestic nature based overnight visitors to NSW. '45-54 years' (17.0%) was the 2<sup>nd</sup> biggest age group.

#### Transport

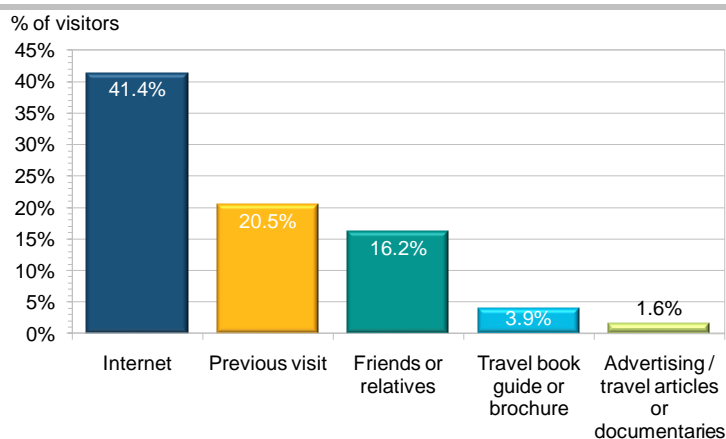
'Private or company vehicle' (82.7%) was the most common transport used to destinations in NSW by domestic nature based overnight visitors. 'Air transport' (11.8%) was the 2<sup>nd</sup> most common, followed by 'railway' (2.5%).

#### Household income<sup>(6)</sup>

Over 3/5 (60.5%) of domestic nature based overnight visitors to NSW had an annual household income above \$78,000. This was a higher percentage than for all visitors to the State (59.0%).

<sup>(6)</sup> Based on visitors who provided household income details.

#### Information sources



The 'internet' (41.4%) was the most popular information source for the trip in Australia by domestic nature based overnight visitors who had been to NSW. 'Previous visit' (20.5%) was the 2<sup>nd</sup> most popular, followed by 'friends or relatives' (16.2%).

#### Package tours

Only 1.6% of domestic nature based overnight visitors to NSW, travelled on a package tour. 'Accommodation' (96.0%) was the most popular travel arrangement included in the package.

#### Type of nature based activity

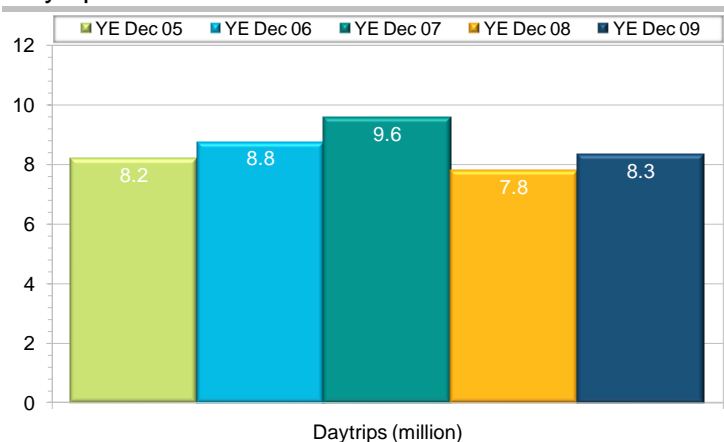
Nature based activity	Visitors	
	('000)	%
Go to the beach	5,263	68.2%
Bushwalking or rainforest walks	1,982	25.7%
Visit national parks or State parks	1,853	24.0%
Visit botanical or other public gardens	766	9.9%
Visit farms	339	4.4%
Go whale or dolphin watching	169	2.2%
Average number of nature based activities	1.4	

'Go to the beach' (68.2%) was the most popular nature based activity undertaken by domestic overnight visitors to NSW.

#### Seasonality

The March quarter (34.3%) had the most domestic nature based overnight visitors to NSW. The March quarter (40.8%) also attracted the most nights in the State.

#### Daytrips



NSW received 8.3 million domestic nature based daytrip visitors - up by 7.2% on YE Dec 08.

Between YE Dec 05 and YE Dec 09, nature based daytrip visitors to NSW experienced an average annual growth of 0.5%.

#### Market share - daytrips

Nature based day-trippers represented 17.9% of domestic daytrip visitors to NSW. The State received 31.6% of nature based daytrip travellers in Australia.

#### Expenditure on daytrips

Domestic nature based daytrip visitors to NSW spent \$822 million during their trip - down by 0.9% on YE Dec 08. On average, visitors spent \$98 per trip in NSW.

#### Type of nature based activity on daytrips

Over 3/5 (60.9%) of nature based daytrip visitors to NSW 'went to the beach'.

#### 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.