

Coach and Charter Seminar 2011 Bus NSW

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Tourism NSW



Introduction

- Tourism Research Update:
 - Domestic markets
 - International markets
 - Daytrip markets

Introduction to Tourism NSW

- What we do
- Opportunities

Product development, Partnerships, Promotion



Data Methodology

Domestic Data

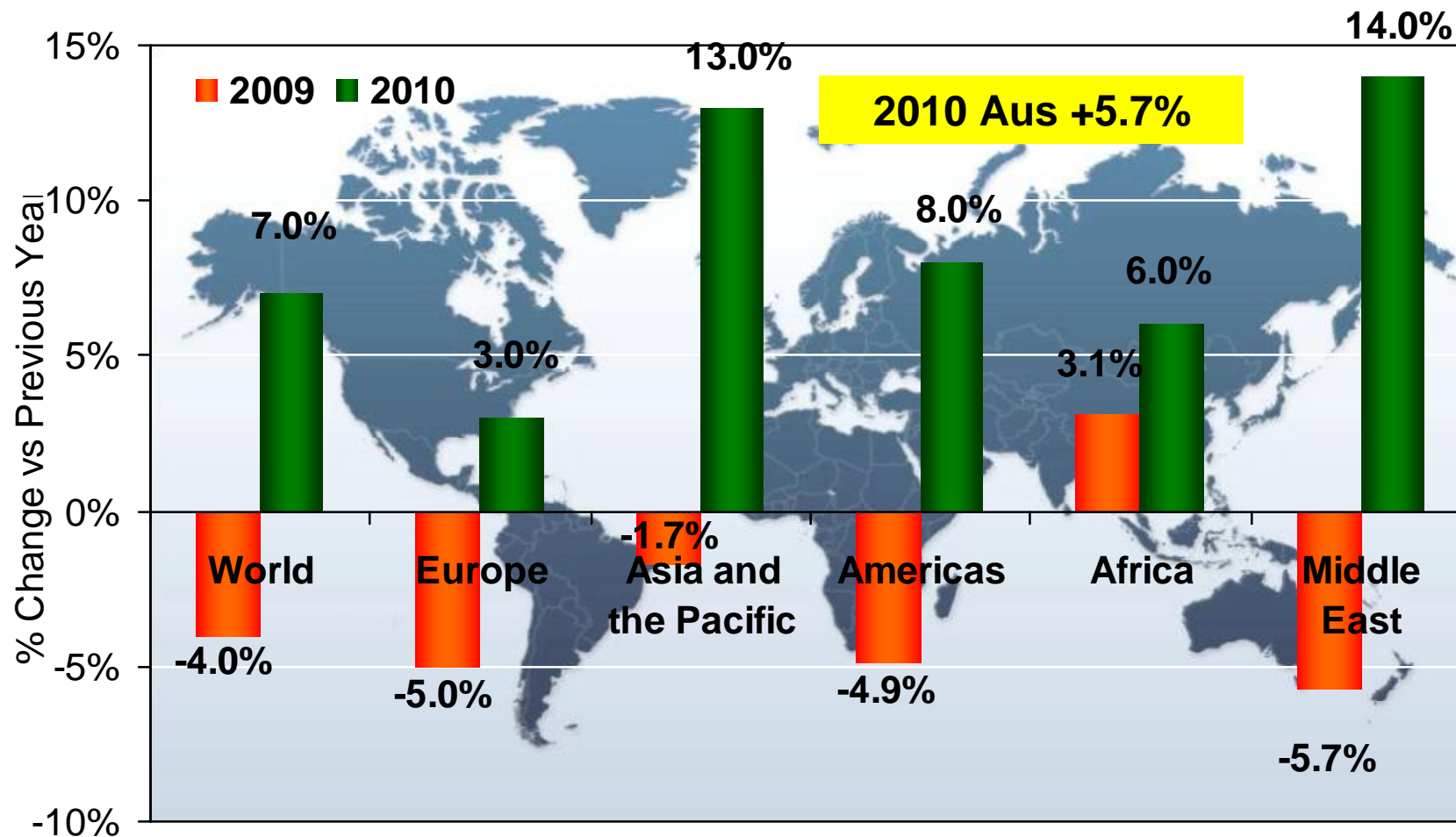
- Tourism Research Australia's National Visitor Survey
 - Annual sample 120,000.
 - Random digit dialling and Computer Assisted Telephone Interviewing system.
 - Details about recent travel, for day trips, overnight stays and overseas travel.

International Data

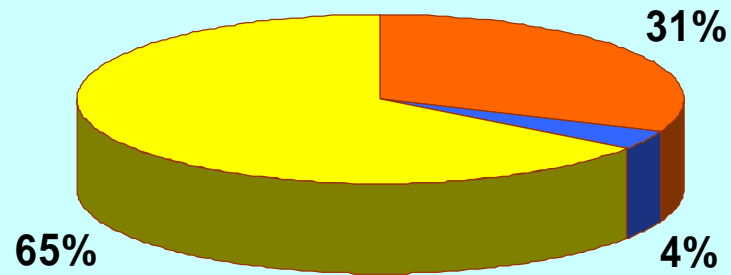
- Tourism Research Australia's International Visitor Survey
 - Annual sample 40,000 departing, short-term international travellers.
 - In the departure lounges of the major international airports
 - Weighted to ABS Overseas Arrivals and Departures data



World Tourism Arrivals

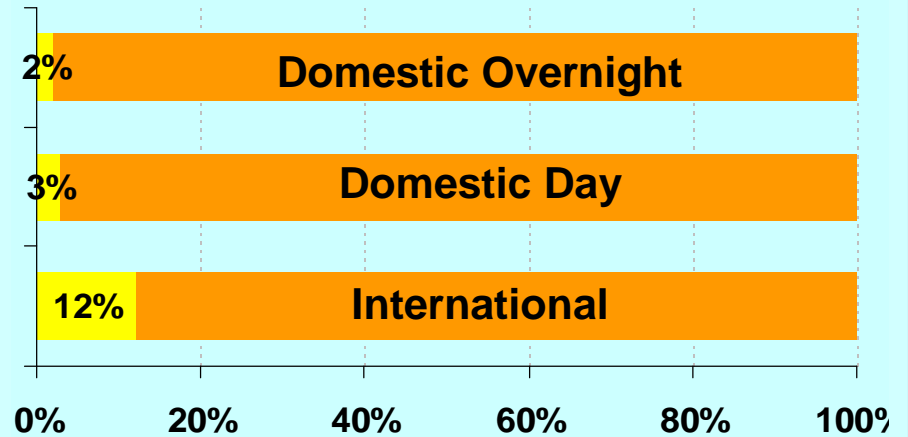


Share of Visitors to NSW
Year Ending September 2010

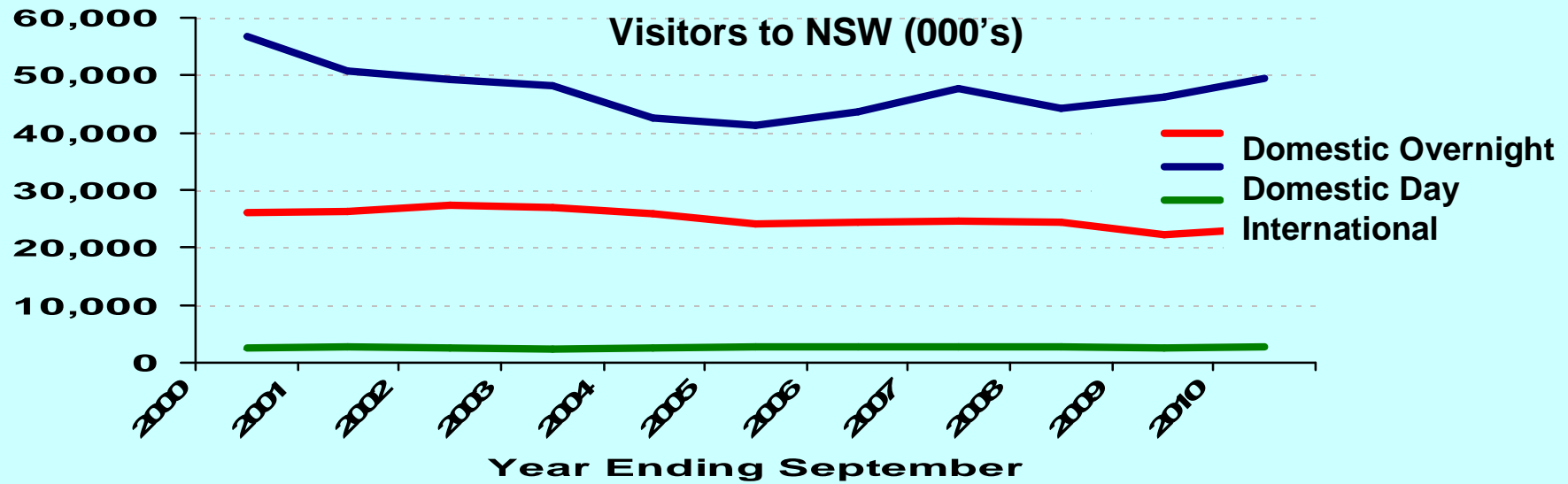


Domestic Overnight International Domestic Day

Share of Visitors Using Bus or Coach Transport

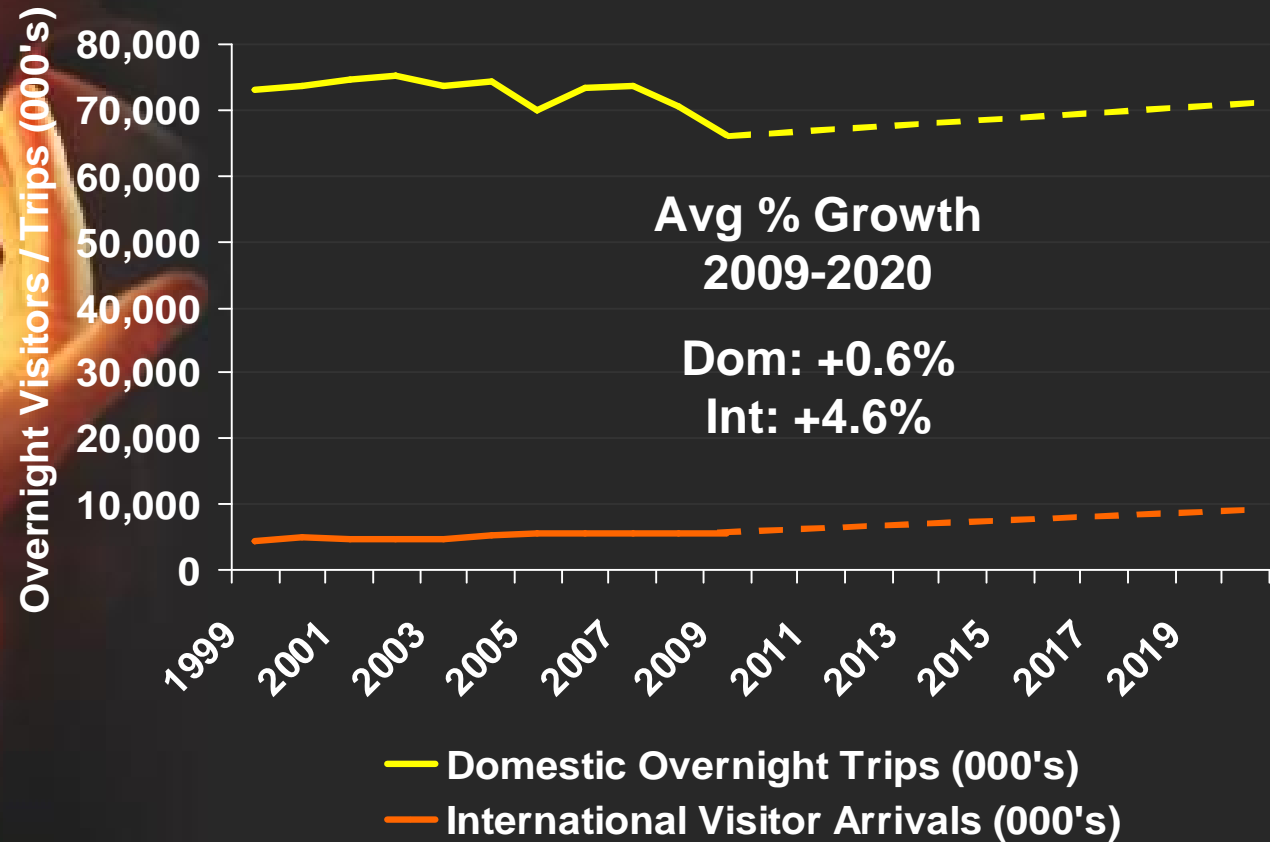


Visitors to NSW (000's)



Source: Tourism Research Australia National and International Visitor Survey
Year Ending September 2010

Overnight Visitor Forecast



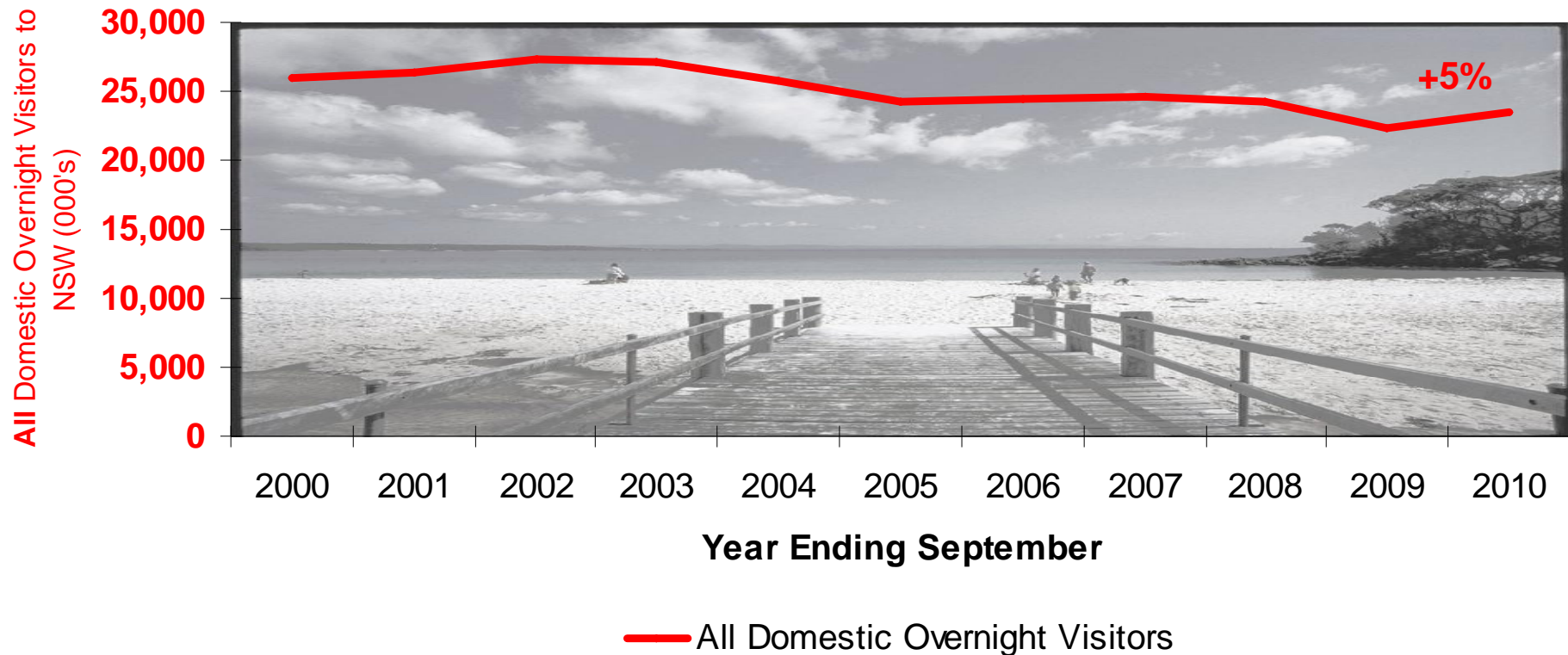
Source: Tourism Forecast Committee Issue 2, 2010

Opportunities in the Domestic Overnight Market



Domestic Overnight Visitor Trend NSW?

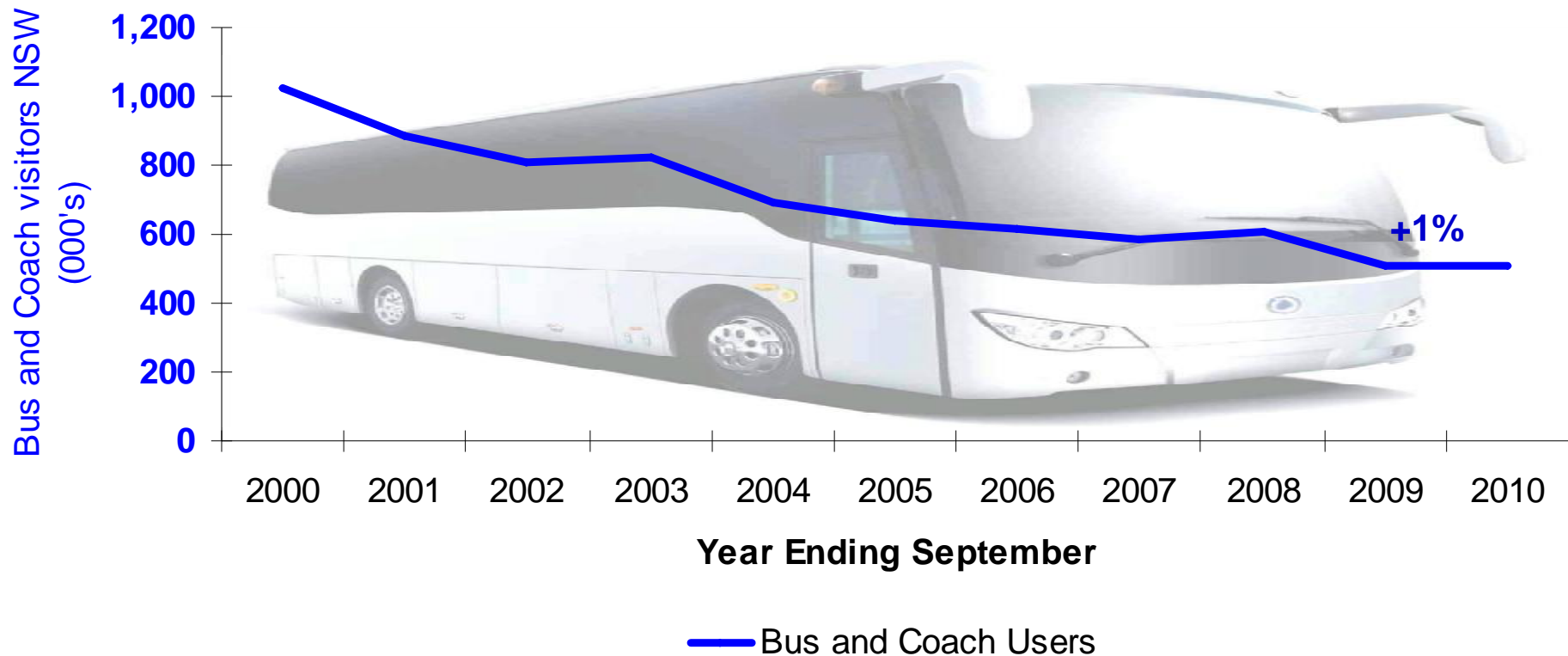
Domestic Overnight Visitor Trends in NSW



Source: Tourism Research Australia National Visitor Survey
Year Ending September 2010

Domestic Overnight Bus / Coach Travel Trends in NSW?

Domestic Overnight Visitor Trends in NSW



Source: Tourism Research Australia National Visitor Survey
Year Ending September 2010

What other forms of transport are **domestic overnight** visitors using? Year Ending September 2010



Total NSW

Visitors: 23.4m

Up: 5%



Private Vehicle

Visitors: 18.1m

Up: 5%

Share: 77%



Air Travel

Visitors: 3.9m

Up: 8%

Share: 17%



Railway

Visitors: 833,000

Up: 2%

Share: 4%



Bus & Coach

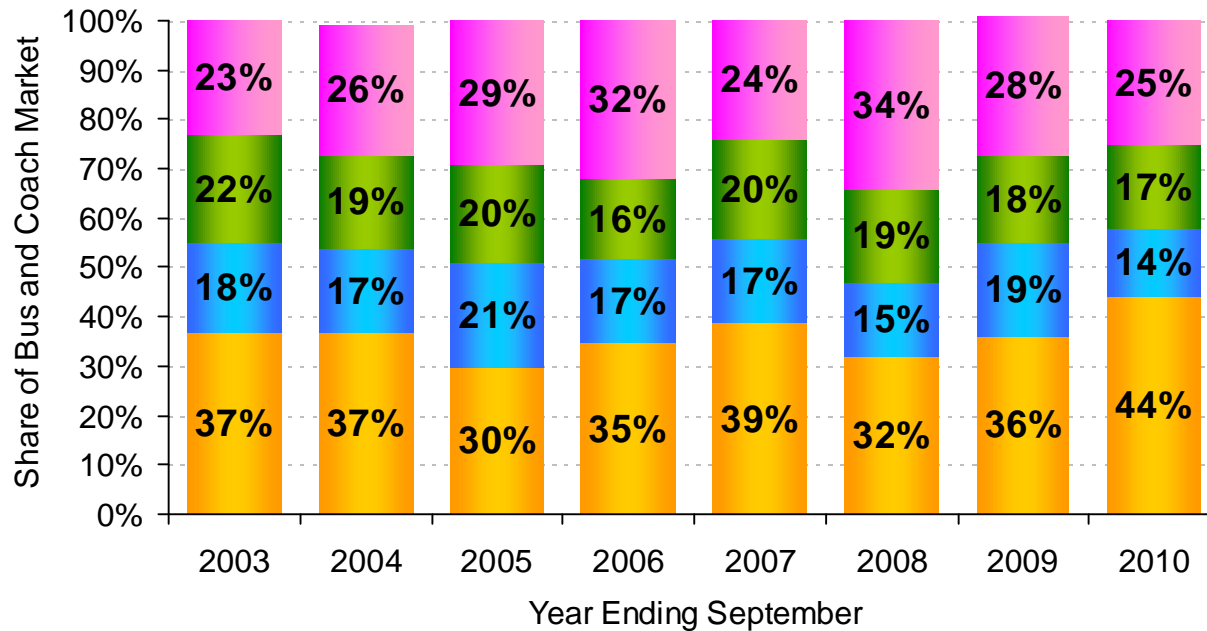
Visitors: 474,000

Up: 1%

Share: 2%

Age groups using bus and coach transport while visiting NSW?

NSW Visitors Using Bus and Coach Transport Age Groups Share



Older segment appeared to be growing until 2006, when it lost share to the younger categories.

Younger segment make up almost half the bus and coach market

■ 15 - 24 years ■ 25-44 years ■ 45-64 years ■ 65 years or over



Demographic Shift in Bus/Coach Travel?



**15 – 24
Years**

**Share
Increase**



**School
Groups**

**Sporting
Groups**


**+65
Years**

**Share
Decrease**



**Non-School or
Sporting Groups**

Other Demographics about Domestic Overnight Bus Travellers



One quarter of the visitors are on short breaks (2 nights away from home)

36% travelling as part of a package

Sydney most popular destination, followed by South Coast

More likely to undertake nature activities, sightseeing and sports

Avg household income <\$104,000

Opportunities in the International Market



Visitor Trends: International Market in NSW

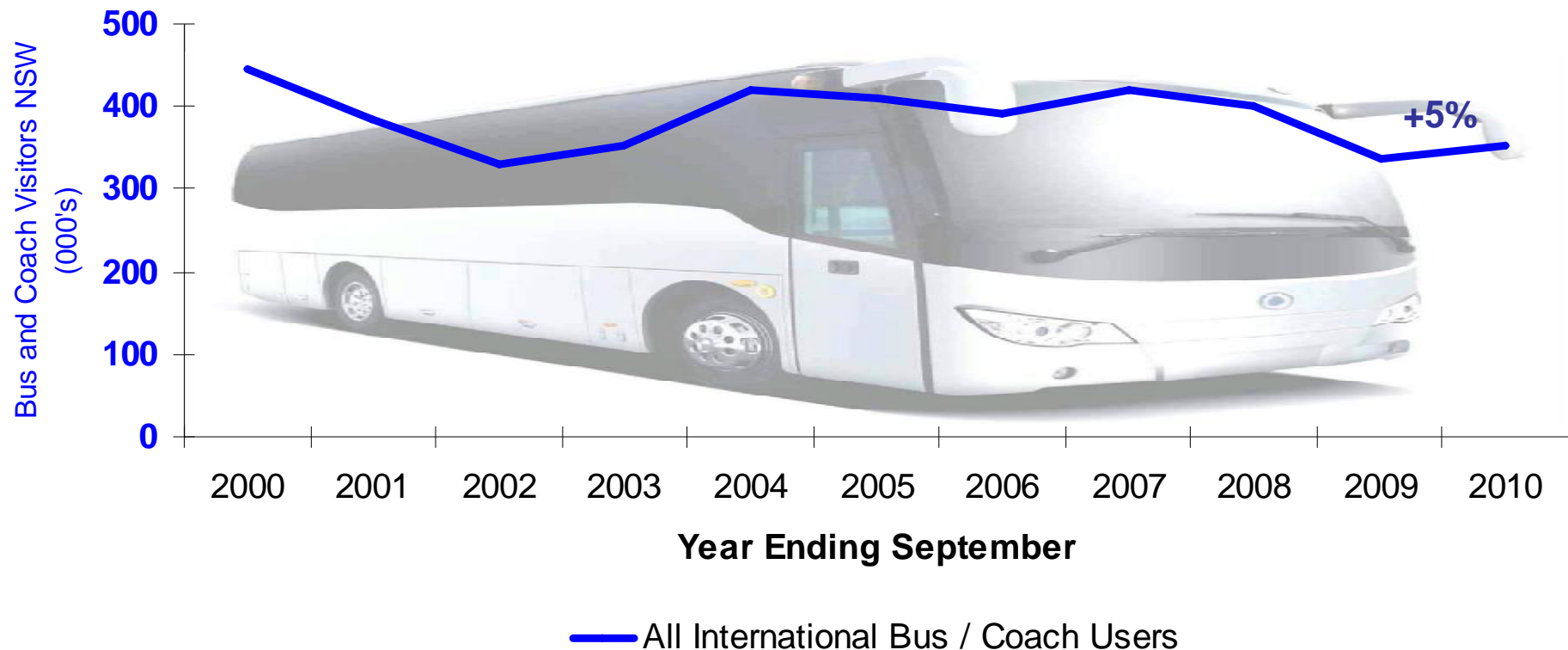
International Visitor Trends in NSW



Source: Tourism Research Australia International Visitor Survey
Year Ending September 2010

Bus / Coach Travel Trends for International Market in NSW?

International Visitor Trends in NSW



What other forms of transport are international visitors using?



Total NSW

Visitors: 2.8m

Up: 7%



Private / Rental Car

Visitors: 1m

Up: 4%

Share: 36%



Air Travel

Visitors: 831,000

Up: 8%

Share: 29%



Railway

Visitors: 101,000

Down: 1%

Share: 4



Bus & Coach

Visitors: 352,000

Up: 5%

Share: 12%

Who is using buses?

China #1

**36%
backpackers**

**15 – 44 Age
groups most
popular. +65 age
very small**

**Northern Rivers
and Mid-North
Coast popular**

**59%
independent
travellers**

**Half have only
one stopover in
NSW**



**Sydney most
popular
destination**

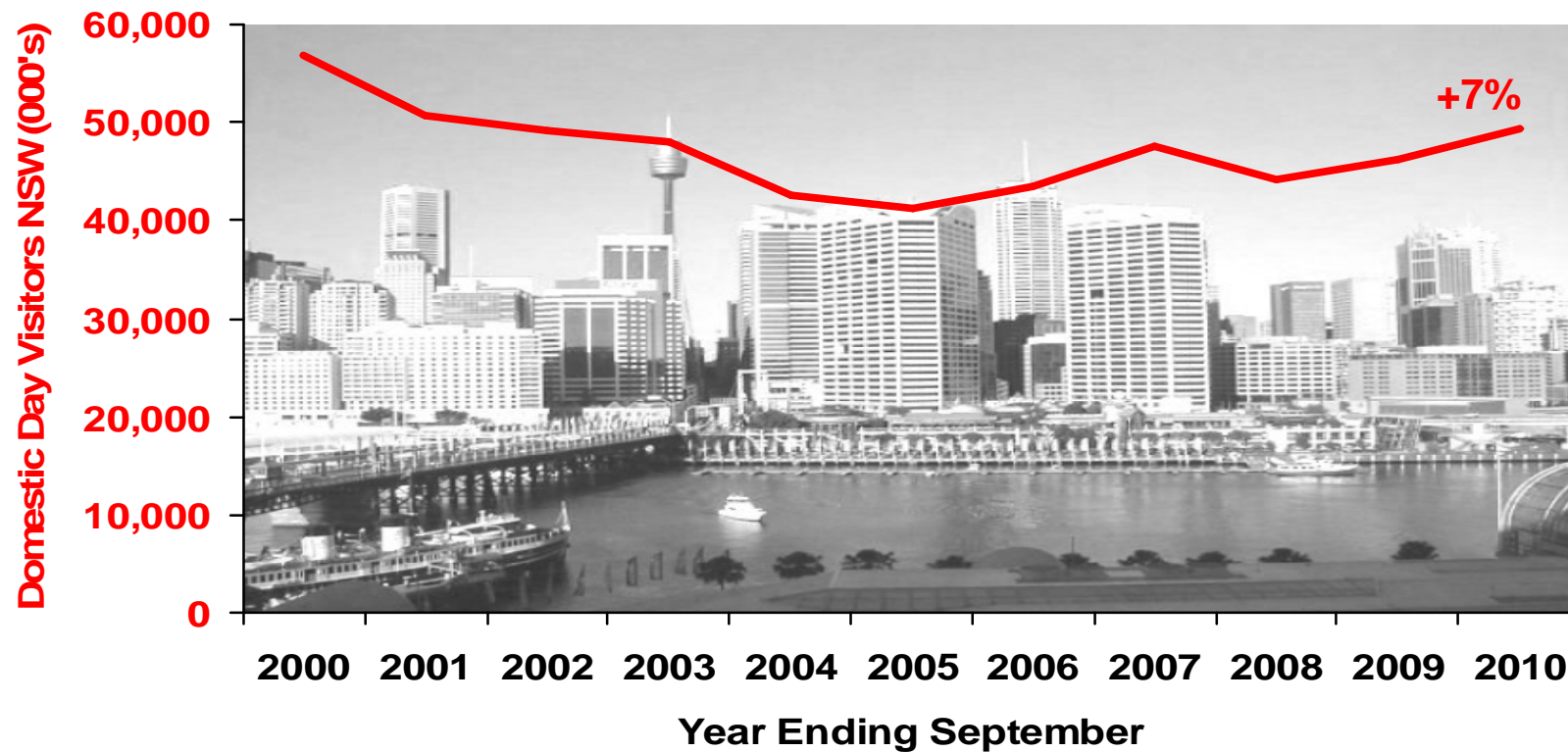
**UK and Japan
large markets,
but declining**

Opportunities in the Domestic Daytrip Market



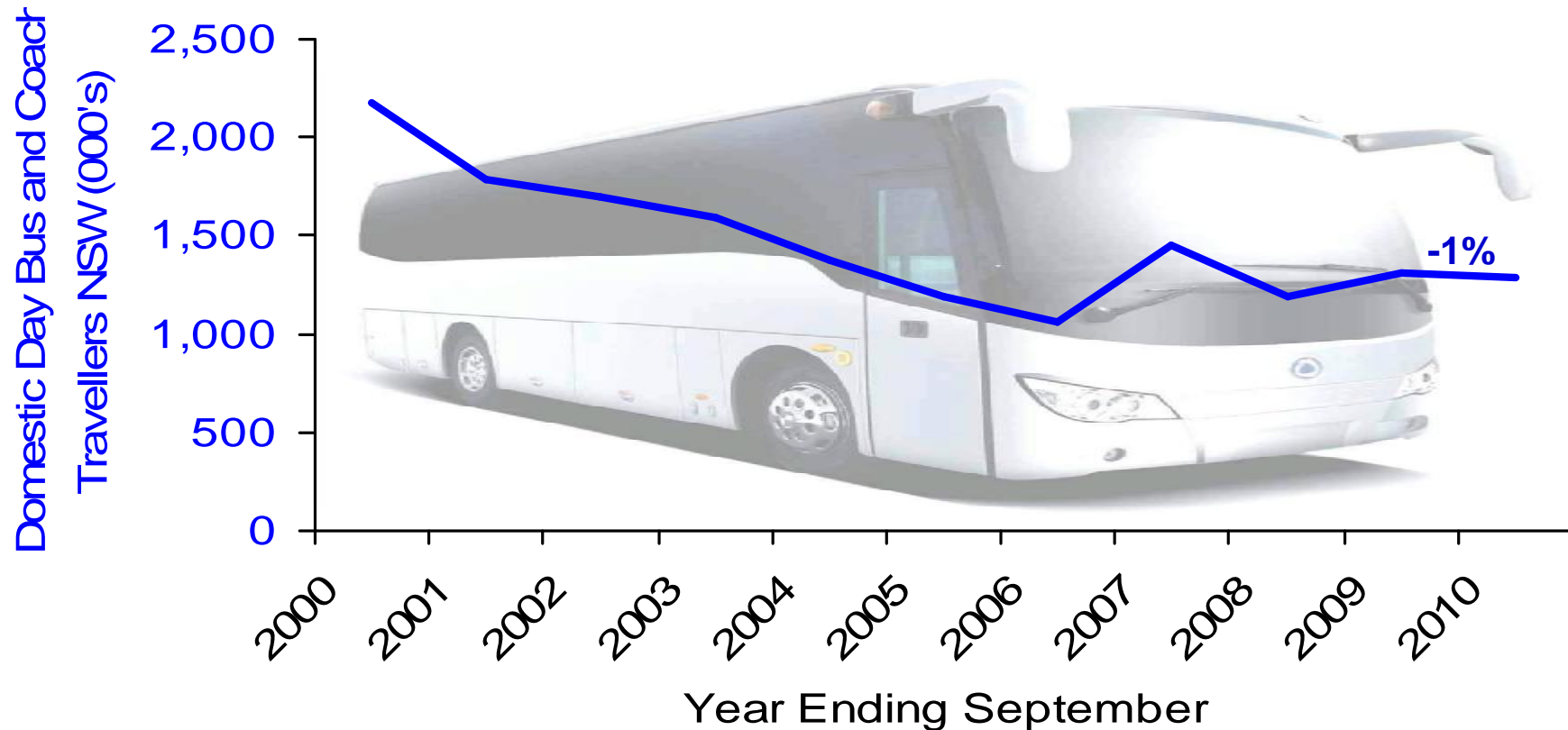
Day trip visitor trends in NSW

Domestic Day Visitors NSW (000's)



Bus / Coach Travel Trends for the Day Trip Market in NSW?

Domestic Day Bus and Coach Travellers NSW (000's)



What other forms of transport are day trip visitors using?



Total NSW

Visitors: 49m

Up: 7%



Private / Rental Car

Visitors: 44m

Up: 7%

Share: 89%



Air Travel

Visitors: 497,000

Up: 12%

Share: 1%



Railway

Visitors: 3.1m

Up: 14%

Share: 6%



Bus & Coach

Visitors: 1.3m

Down: 1%

Share: 3%

Who is using buses?

Hunter popular regional area for people who use buses

Wed and Thur most popular days

Almost half over the age of 65

Half are retired, but this market is getting smaller



Most people travel alone or in large groups

For more tourism facts and figures, please visit
www.tourism.nsw.gov.au

Tourism New South Wales

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Tourism NSW

Corporate Site

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- State Tourism Statistics
- Sydney Tourism Statistics
- Regional Tourism Statistics
- Local Area Statistics
- International Markets
- Business Visitors
- Research Reports
- Archive
- Other Research Sources

New TV commercials from the recently launched Sydney and NSW destination marketing campaigns

Tourism New South Wales

[NSW, still number one](#)

It's just over two years into the implementation of the NSW Tourism Strategy, and the State is on track to meet its targets for visitor nights and expenditure. NSW continues to be the number one State for total visitor nights, visitor numbers and visitor expenditure. We've also experienced strong growth in market share in the holiday segment.

[See our new fact sheet with all the latest results.](#)

TQUAL Grants - applications open

TQUAL Grants - Tourism Quality Projects is now open for applications. Funding of between \$15,000 (plus GST) and \$100,000 (plus GST) is available. TQUAL Grants is a competitive merit based grants program that aims to stimulate sustainable economic growth in the Australian tourism industry.

Products:

- Regional Snapshots (including Sydney and total NSW)
- International Market Profiles
- Local Government Area Profiles
- Destination Visitor Survey projects and enquiry information
- Specialised research reports

Introduction to Tourism NSW

What we do

Opportunities:

- Product development, Partnerships, Promotion

Barbara de Rome
Tourism NSW



Tourism and the NSW Government

Tourism NSW is the State Government's tourism agency

- A Division of State and Regional Development and Tourism, part of Industry & Investment NSW
 - Advisory Board
- Tourism is recognised as an economic priority in the NSW Government's State Plan

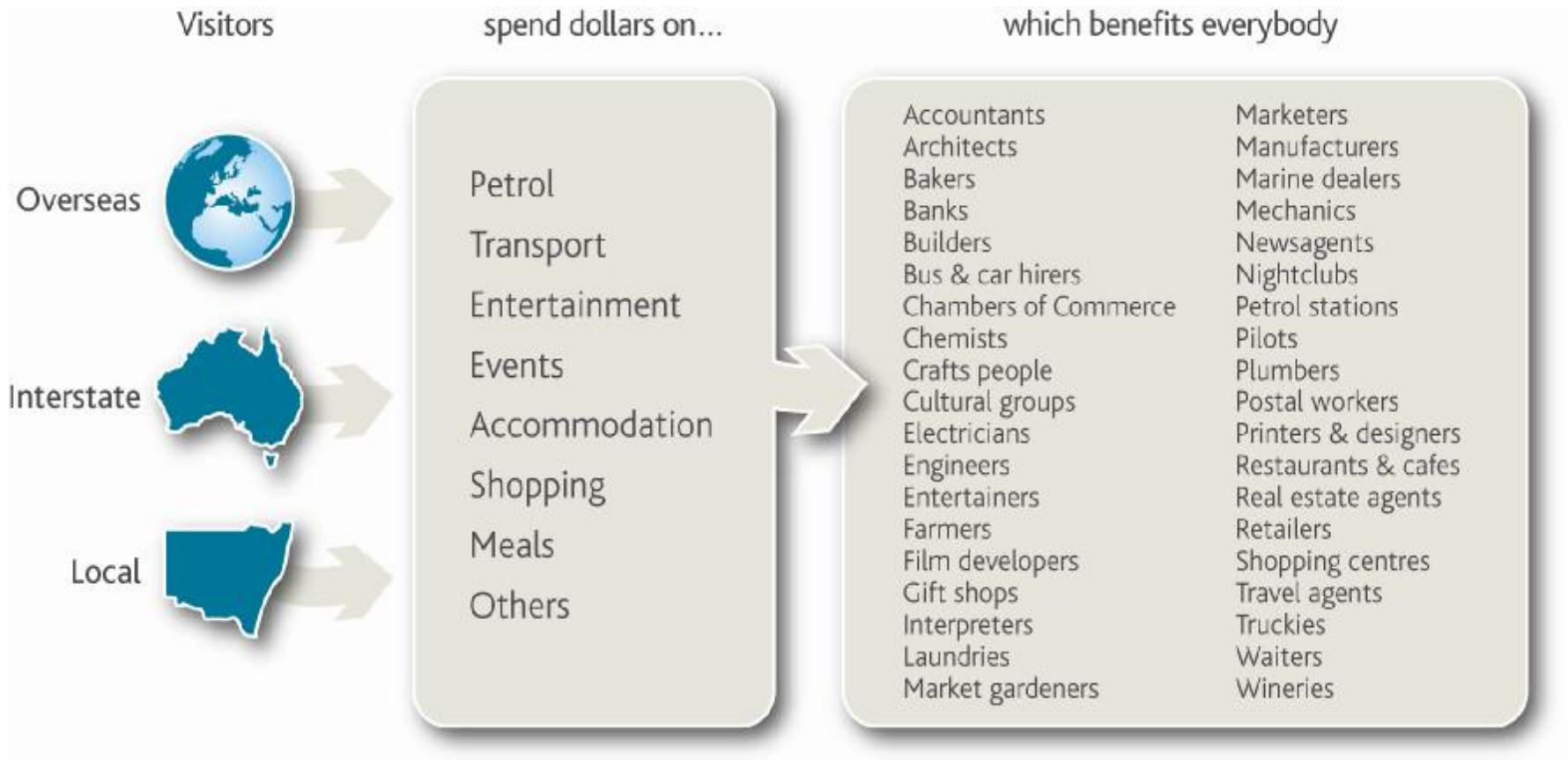


Tourism New South Wales



How Tourism Generates Income and Jobs

- It's not just about hotels, airlines, attractions and tour operators:



How Tourism Generates Income and Jobs

- Tourism businesses buy goods and services and employ locals spreading the benefits throughout local communities





1. Promote/Market NSW Destinations

- § Motivate consumers to visit NSW
- § Provide opportunities for you to market your product.
- § Generate destination publicity through media opportunities
- § Increase knowledge and awareness of NSW products and destinations in overseas distribution channels.
- § Assist the tourism industry in the international marketplace





2. Addressing supply side issues – including:

- NSW Tourism Strategy, NSW Tourism Industry Plan
- Providing advice to Government on tourism issues
- Working with industry on product and destination development
- Development of tourism growth segments e.g. Touring, Aboriginal Food and Wine, Nature, Luxury and Youth
- Research and analysis

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Opportunities

Product
Partnerships
Promotion



Product Development

- § Review your product offering
- § Experience your product as a consumer
- § Consumer trends
 - § Short-break holidays (packages)
 - § Short planning cycles
 - § Holidays based around “experiences” - key decision point
 - § Local area statistics



Product Development

- § Leverage increased investment/activity around events in NSW
 - § Events NSW
 - § Regional Flagship Events Program



More information: www.eventsnsw.com.au

Events NSW

www.tourism.nsw.gov.au

Regional Flagship Events Program



Partnerships

- § Local Tourism Manager and Local Tourism Association
- § Regional Tourism Organisation
- § Local media
- § Conference venues/organisers
- § Group travel organisers – e.g. language schools,
- § Previous customers
- § Distributors (Visitor Information Centres, travel agents, wholesalers, online distributors etc.)
- § Product packaging

More information: www.tourism.nsw.gov.au
www.visitnsw.com



Promotion

- § Regional Tourism Partnership Funding Program
 - § Matched funding for marketing & promotional activities – via Regional Tourism Organisations
- § Tourism NSW Seasonal campaigns – include your product offering
- § ALSO
- § Sponsorship – community/events

More information: www.tourism.nsw.gov.au



Promotion - Digital

- § Tourism NSW – Consumer website - www.visitnsw.com
- § Your own website
- § Search Engine Optimisation
- § User Generated Content (UGC) –Trip Advisor, Flickr, Facebook, YouTube, Blogs etc.
- § eMail marketing

More information: www.tourism.nsw.gov.au

*Tourism eKit
Get Connected*



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