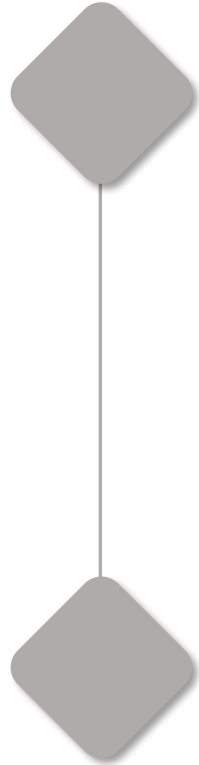


NSW Parks Visitation Survey FY24-25 Annual Report

NSW National Parks and Wildlife Service
February 2026



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Executive summary

NPWS park visitation

- ❖ Roy Morgan estimate there were 65.6m visits to NSW National Parks and Wildlife Service (NPWS) parks by domestic residents during FY24-25, a 24% increase since 2022 and a 9% increase since 2018. FY24-25 visitation has largely returned to the underlying growth trajectory which was apparent from 2014-2018, following the major disruptions to travel and park visitation trends during the 2020 and 2022 surveys.
- ❖ Data on visits to NPWS parks by international visitors is now available through a partnership with Tourism Research Australia. The International Visitors Survey data indicates that 72% of international visitors to NSW visited a NPWS park in FY24-25 (2.8m visitors). Visits to multiple parks means that these international visitors likely generated an additional 4.6m visits.

Park visit behaviour and experiences linked to the last park visited

- ❖ 3 in 5 visitors reported that their last NPWS park visit was the only or main reason for that trip, demonstrating the important role that NPWS parks play in motivating travel in NSW.
- ❖ Walking is the most common activity in NPWS parks, with most people walking for 1-4 hours. Other frequent activities include touring and sightseeing, picnicking and dining, rest and relaxation, water-based recreation, nature appreciation and camping and accommodation.
- ❖ 9 in 10 visitors were either very satisfied or satisfied with their last NPWS park visit.

Annual report

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Introduction

The Park Visitor Survey (PVS) has been conducted on a calendar year reference period every two years since 2008. Substantial changes were made to the survey in 2024/25, including a mixed-mode of data collection, improved sampling of interstate markets, an always-on survey conducted on a financial year basis, and the integration of mobile device movement data.

Improvements to the methodology

- ❖ In FY24-25 the Parks Visitation Survey (PVS) shifted from a fully interviewer assisted telephone survey to a multi-mode data collection embedded within Roy Morgan's Single Source; a short telephone survey followed by a detailed self-complete online survey.
- ❖ Most notably, residents of South Australia, Western Australia, Northern Territory and Tasmania were surveyed for the first time. Previously, only residents of the eastern seaboard were surveyed and visitation from other states was estimated.
- ❖ In addition, anonymised mobile device movement data was incorporated to inform measures such as seasonal visitation.
- ❖ By adding data sources, Roy Morgan is ensuring the accuracy of the NPWS visitation data is continuously improving. However, caution is required when comparing some of the results of the latest survey with previous surveys. In some instances (which are noted) it is not possible to compare the latest data with historical data.

Park Visitor Survey key research objectives

The primary objective of the NSW Parks Visitor Survey is to accurately measure the number of total visits to NSW parks and administrative branches. Secondary objectives include:

1. Estimate the proportion of visitors participating in different activities when visiting NPWS parks and compare visits to NPWS managed parks and activities undertaken by different demographic groups;
2. Obtain a measure of overall satisfaction with the NPWS park visit experience;
3. Obtain measures of duration of park visit, type of trip taken when the park visit was made and the role of the park visit in the overall decision to travel;
4. Compare survey findings with results from previous years to identify any significant changes; and
5. Identify any potential causes or 'triggers' that influence park visitation.

NPWS park visitation – domestic visitors

Roy Morgan estimate that there were **65.6m** visits by domestic residents to NPWS parks during FY24-25.

53,091,099 visits by adults (**81%** of visits)



12,499,013 visits by children (**19%** of visits)



NPWS park visitation - international visitors

Data on visits to NPWS parks by international visitors is now available through a partnership with Tourism Research Australia.

International travelers who visited a NPWS park

72% of international visitors to NSW visited a NPWS park in FY24-25.

This equates to **2.8m** visitors.

Two thirds visited a single park, while one third made more than one visit (typically two visits).

Visits to multiple parks means that these international visitors likely generated an additional **4.6** million visits in FY24-25.

Table. Top 10 countries of origin of international visitors to NPWS parks

Rank	Country of origin	No. visitors to NPWS parks
1	China	362,271
2	Korea	346,526
3	United States of America	303,988
4	United Kingdom	272,422
5	Other Europe*	141,565
6	New Zealand	122,580
7	Japan	120,713
8	India	109,775
9	Germany	102,498
10	Singapore	89,075

Note: Other Europe excludes: United Kingdom, Germany, France, Scandinavia, Italy, Netherlands, Switzerland.

NPWS park domestic visitation trends

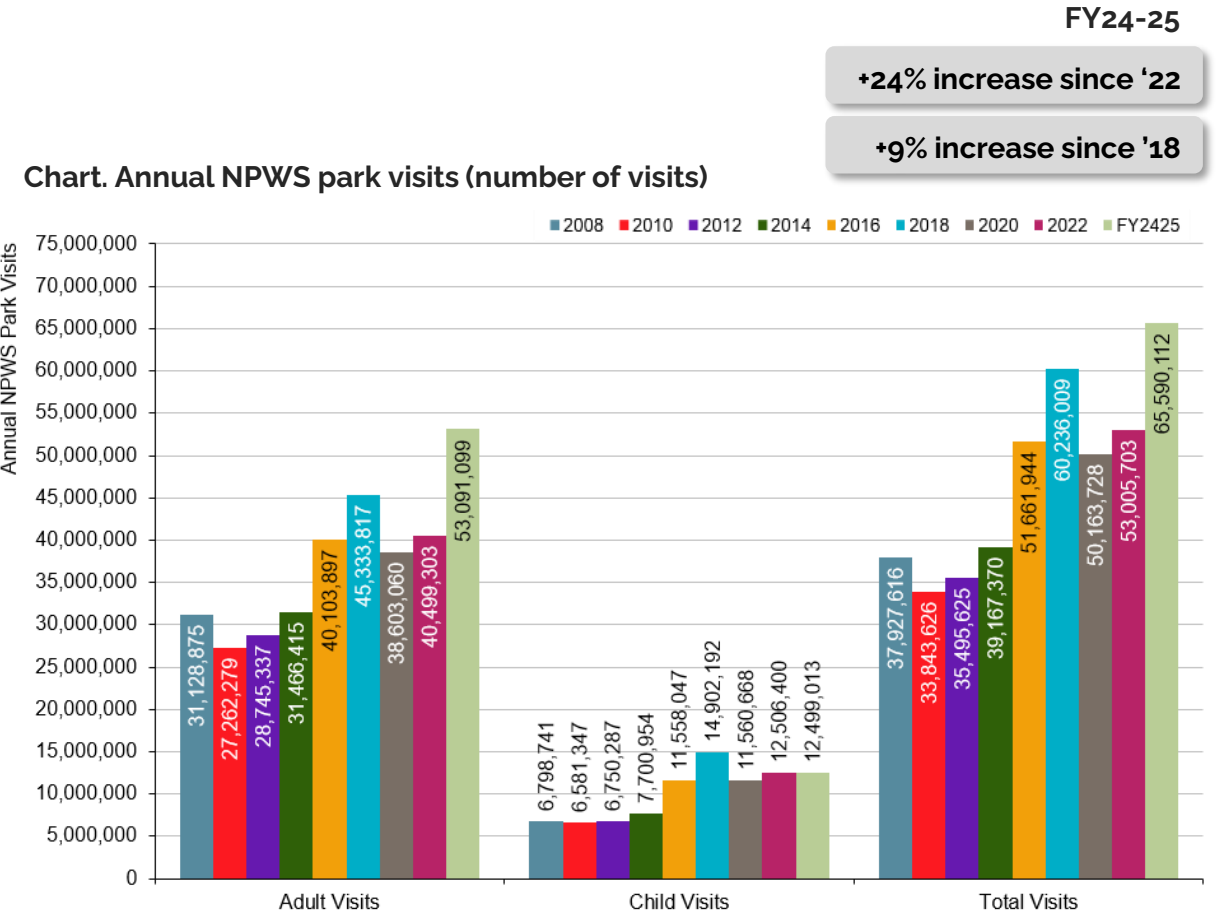
In FY24-25, NPWS visitation largely returned to the underlying growth trajectory which was apparent from 2014-2018, following the major disruptions to travel and park visitation during the 2020 and 2022 surveys.

2020 – 2022 park visitation disruptions

- ❖ The 2019–20 bushfires were unprecedented in their extent and intensity, with more than 37% of the NSW park system adversely impacted.
- ❖ The COVID-19 pandemic and its associated movement restrictions impacted access to parks from March through to December 2020.
- ❖ Major rain events and flooding occurred across the whole of 2022, from the Queensland border to the Illawarra region limiting access to parks along the coast, but particularly to parks in the North Coast and Hunter Central Coast branches.

Table. Annual NPWS park number of visits by domestic residents

Survey year	Adults	Children	Total visits
FY24-25	53,091,099	12,499,013	65,590,112
2022	40,499,303	12,506,400	53,005,703
2020	38,603,060	11,560,668	50,163,728
2018	45,333,817	14,902,192	60,236,009
2016	40,103,897	11,558,047	51,661,944
2014	31,466,415	7,700,954	39,167,370
2012	28,745,337	6,750,287	35,495,625
2010	27,262,279	6,581,347	33,843,626
2008	31,128,875	6,798,741	37,927,616



NPWS park visitation by origin

The proportion of total visits from interstate visitors has continued to grow over time. Outside of NSW, the highest number of visits to NPWS parks came from Melbourne (**2.3m**), followed by regional Queensland (**2.1m**), and Brisbane (**2.0m**).

Table. Proportion of interstate visits to a NPWS park over time

Survey	% of total visits
FY24-25	16.4%
2022	13.2%
2018	12.8%



Table. Adult and child visits to a NPWS park by origin

Origin	Adults	Children	Total visits
Sydney	34,680,797	7,455,599	42,136,397
Regional NSW	10,790,569	1,889,164	12,679,733
Total Intrastate	45,471,366	9,344,763	54,816,130
ACT	1,376,038	316,092	1,692,130
Melbourne	1,494,277	766,545	2,260,821
Regional VIC	854,979	339,337	1,194,316
Brisbane	1,397,195	558,334	1,955,529
Regional QLD	1,762,364	385,473	2,147,837
Adelaide	194,780	145,431	340,212
Regional SA & NT	303,790	455,563	759,353
Perth	54,898	24,161	79,059
Regional WA	38,454	23,813	62,267
Hobart	51,325	34,500	85,825
Regional TAS	91,632	105,001	196,633
Total Interstate	7,619,732	3,154,250	10,773,982
Total	53,091,099	12,499,013	65,590,112

Photo credit: Blue Mountains National Park (Remy Brand/DCCEEW).
 NSW Parks Visitation Survey: FY24-25 Annual Report. Base: n=17,072 Australian residents aged 18+.

Role of NPWS park visit in most recent trip

3 in 5 visitors reported that their last NPWS park visit was the **only** or **main reason** for that trip. This is lower than previous years due to the inclusion of more interstate visitors. For **7 in 10** NSW residents, their last NPWS park visit was the **only** or **main reason** for that trip, compared to **3 in 10** for interstate visitors.

Chart. Role of NPWS park visit in most recent trip (proportion)

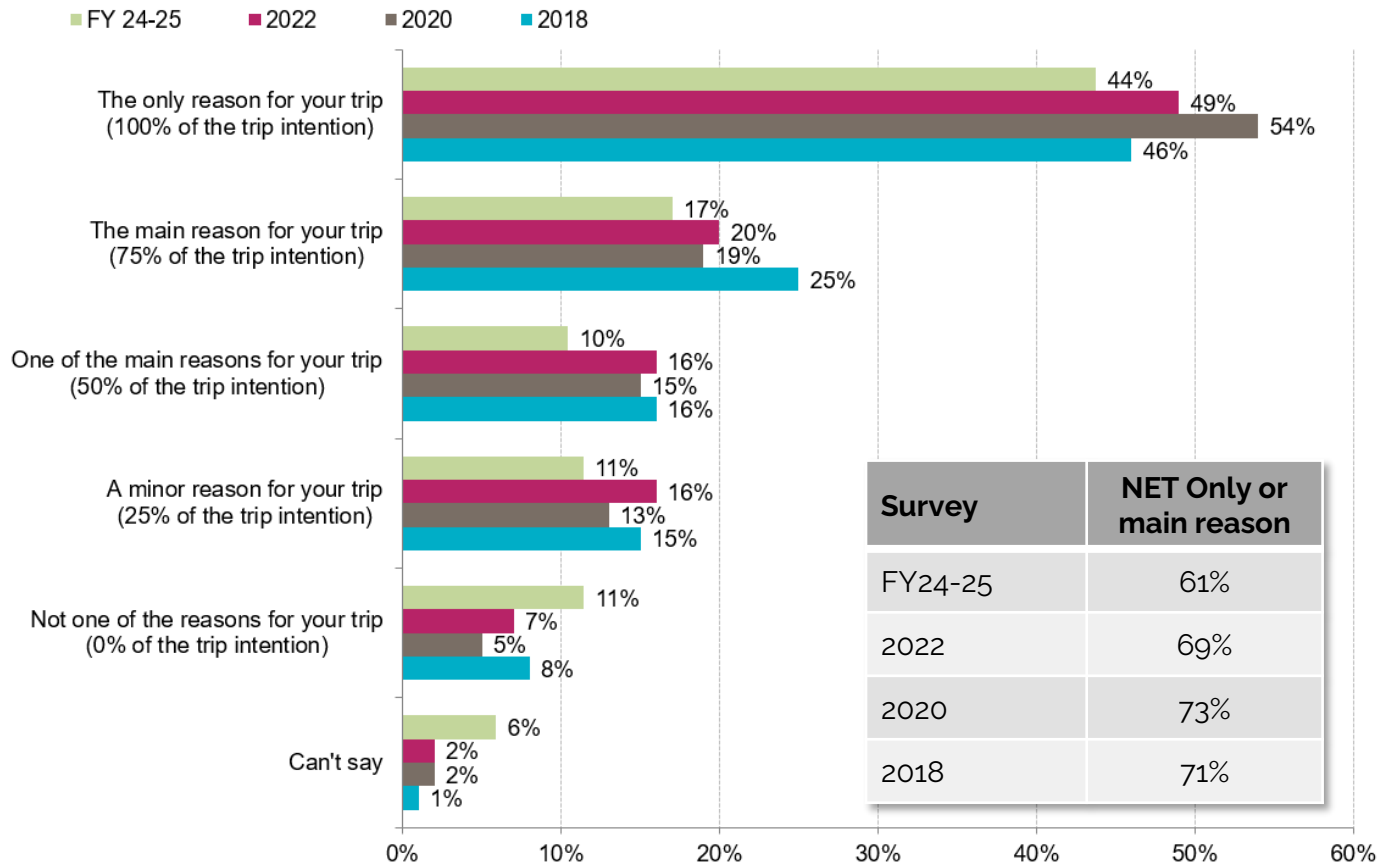


Table. Role of NPWS park visit in most recent trip by origin

Trip reason	Intrastate	Interstate
NET only/main reason	70%	28%
The only reason for your trip (100% of the trip intention)	51%	17%
The main reason for your trip (75% of the trip intention)	19%	11%
One of the main reasons for your trip (50% of the trip intention)	9%	15%
A minor reason for your trip (25% of the trip intention)	9%	22%
Not one of the reasons for your trip (0% of the trip intention)	8%	24%
Can't say	4%	11%

Satisfaction with most recent visit

Most visitors were either very satisfied or satisfied with their last NPWS park visit (**89%**). Very few were dissatisfied (**4%**), with the remainder neutral (**7%**). Satisfaction was notably higher among NSW residents (**90%**) compared to interstate visitors (**85%**), and among people aged 35+.

Chart. Satisfaction with most recent NPWS park visit (proportion)

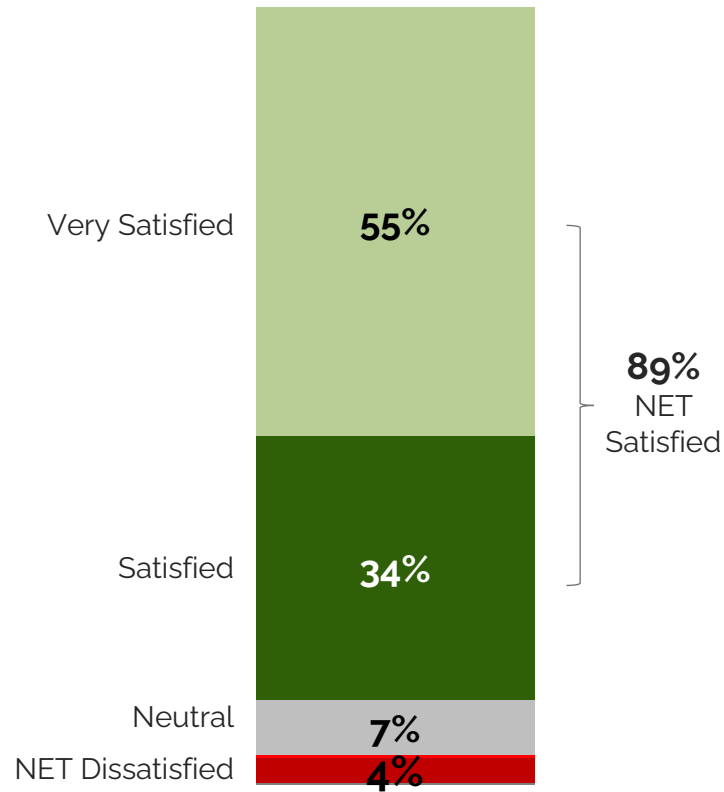


Table. Satisfaction with most recent NPWS park visit by demographics (proportion)

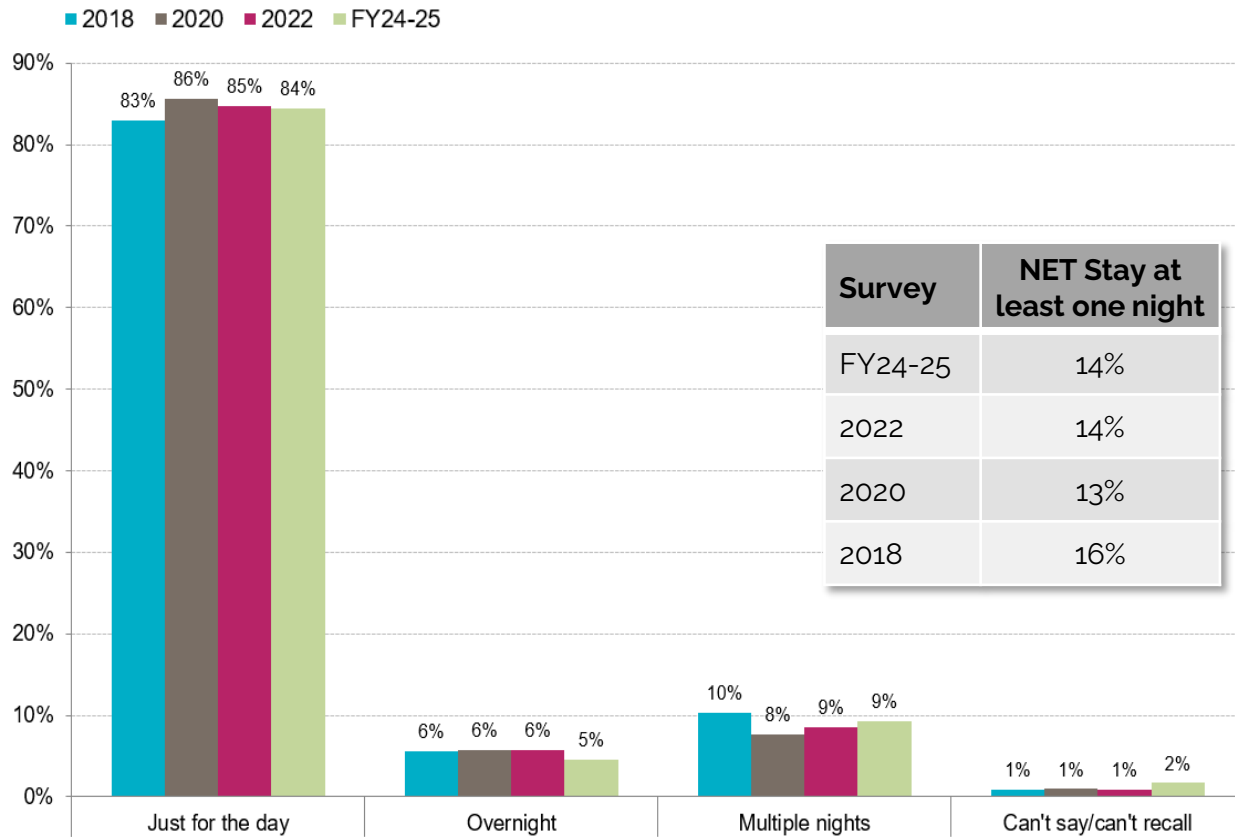
	Intrastate	Interstate		
NET Satisfaction	90%	85%		
	18-34	35-49	50-64	65+
NET Satisfaction	85%	89%	94%	90%

Note, with the shift to an online methodology, these results have moved away from the extremes and towards the mid-point. Use caution when comparing to historical results. Note, the total satisfaction result includes people who could not identify the specific park visited; the satisfaction of these respondents tends to be lower. NSW Parks Visitation Survey: FY24-25 Annual Report. Base: n=17,072 Australian residents aged 18+.

NPWS park visit duration

Park visit duration has remained stable, with most visitors going just for the day. Duration of visit varies for interstate and intrastate visitors; around **3 in 10** interstate visitors stay at least a night.

Chart. Duration of NPWS park visit (proportion)



Survey	NET Stay at least one night
FY24-25	14%
2022	14%
2020	13%
2018	16%

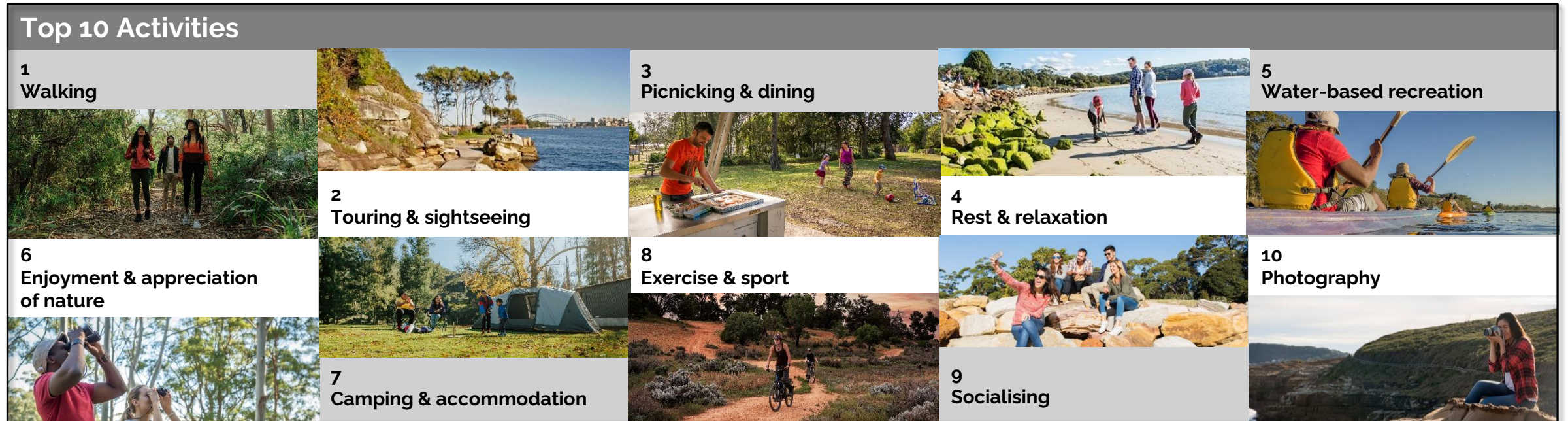
Table. Duration of NPWS park visit by origin

Duration	Intrastate	Interstate
Just for the day	88%	69%
Overnight	3%	11%
Multiple nights	7%	17%
NET Stay at least one night	10%	28%
Can't say/recall	2%	2%

Activities undertaken on most recent visit

Walking is the most common activity undertaken at NPWS parks. Other frequent activities include touring and sightseeing, picnicking and dining, rest and relaxation, water-based recreation, nature appreciation, and camping and accommodation.

Table. Top activities undertaken on most recent NPWS park visit



Break in series

Activities undertaken in NPWS parks cannot be compared with historical data and only rankings will be provided for FY24-25. This question changed from an open-ended question to a prompted list of responses. When prompted by the list, respondents select more activities, so the relevant percentages are typically higher. Additionally, prompting can mean there are activities being selected that may have been less top of mind. This series of data will be restored as subsequent surveys are conducted.

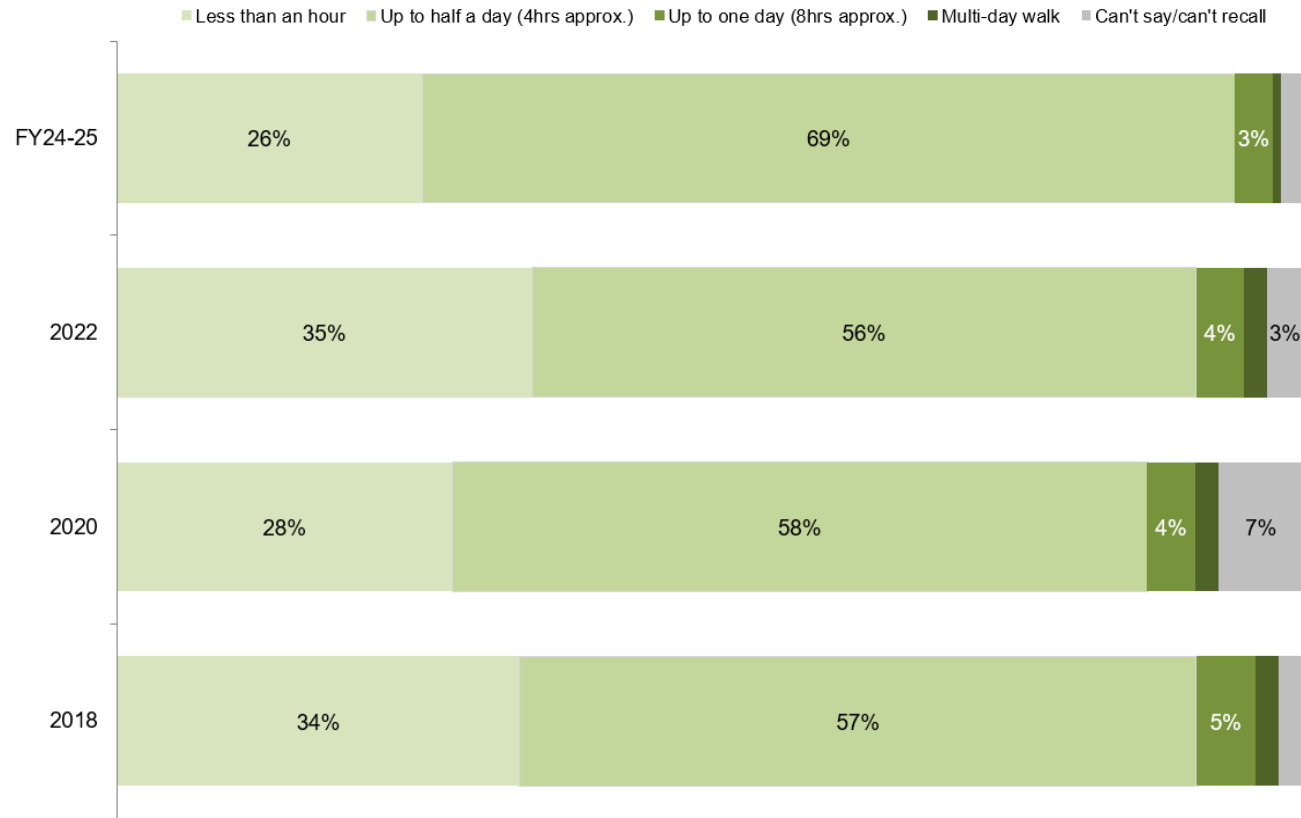
Photo credit: DCCEEW.

NSW Parks Visitation Survey: FY24-25 Annual Report. Base: n=17,072 Australian residents aged 18+.

Length of walk on most recent visit

Most people who reported walking walked for 1-4 hours (**69%**). Fewer visitors walked for less than an hour (**26%**), for 5-8 hours (**3%**) or for multiple days (**1%**).

Chart. Length of walk during most recent NPWS park visit (proportion)



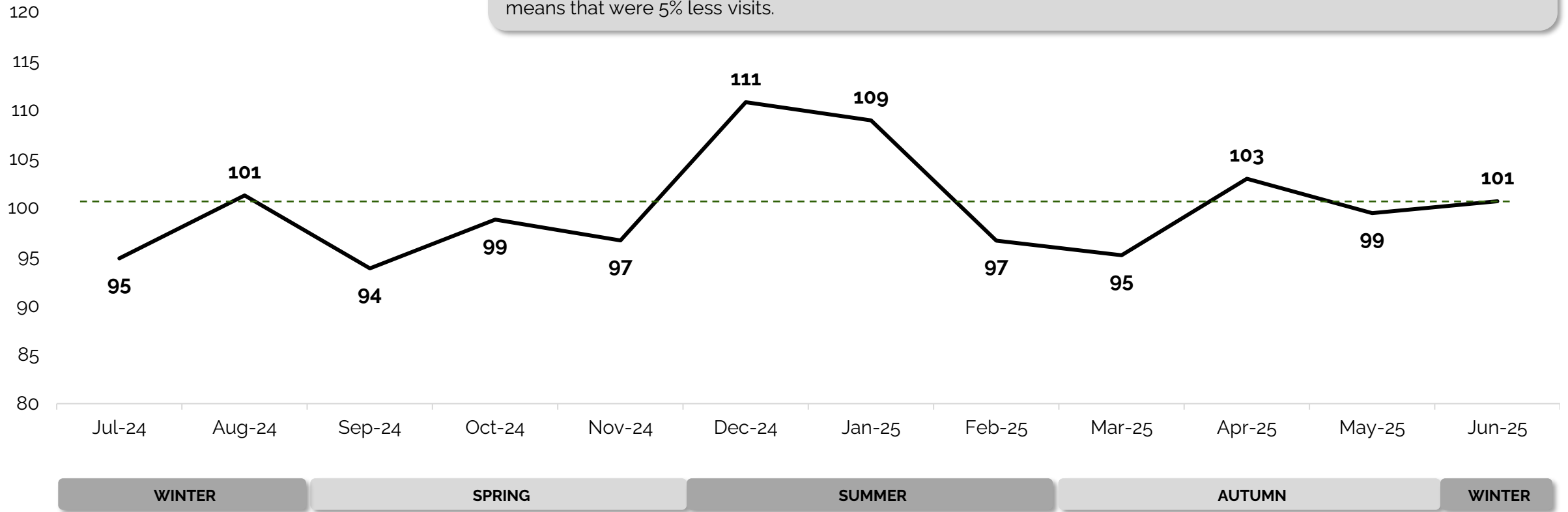
Seasonality of NPWS park visitation

Park visitation is seasonal and influenced by weather conditions. Overall, visitation was highest during the summer and Easter holiday periods.

Chart. Monthly NPWS park visits (index)

How to interpret an index

An index is a statistical measure that is useful for highlighting changes over time. The base value is 100, which reflects the average amount of NPWS visits monthly. A value of 111 means that there were 11% more visits, while a value of 95 means that there were 5% less visits.

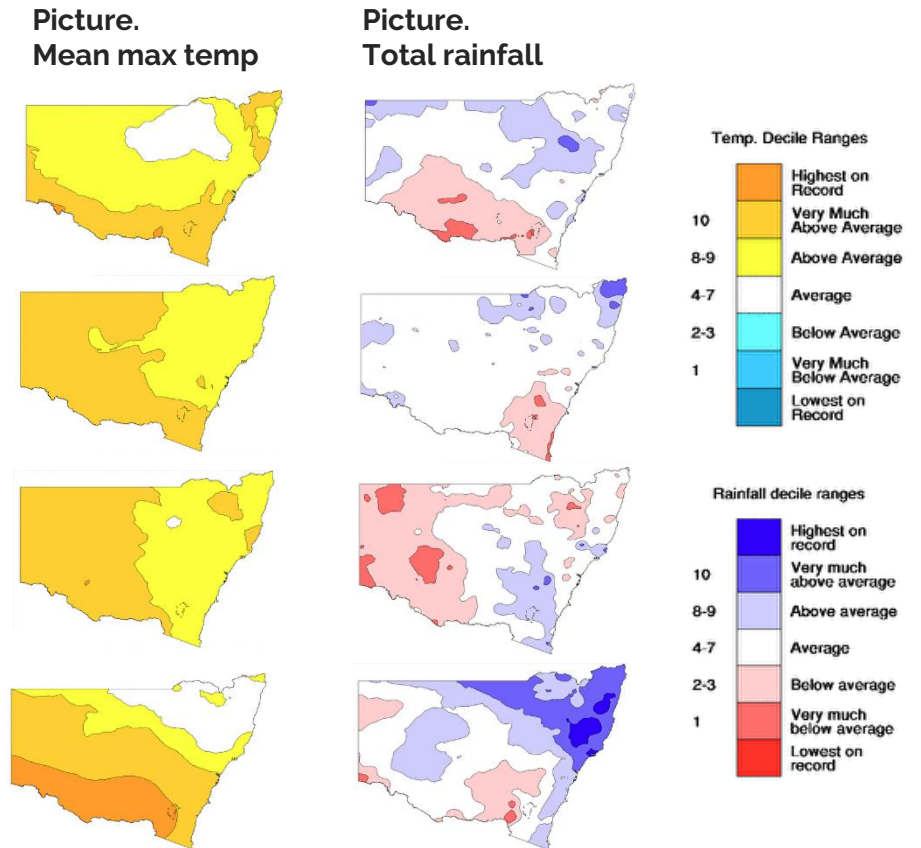


Temperature and rainfall patterns during FY24-25

The spring and summer quarters were dry and sunny. Winter was warm, negatively impacting the snow season but providing good conditions for visitation in other parts of the state. Autumn was both the wettest and warmest on record, with varied impacts on visitation to different regions.

Table. Weather summary for FY24-25

Season	Weather summary	Visitation
Winter 2024	Conditions unfavourable for the snow season, but otherwise favourable.	Moderate
Spring 2024	Average conditions, conducive to normal levels of visitation.	Moderate
Summer 2024-25	Favourable conditions for strong visitation.	High
Autumn 2025	Unfavourable conditions; heavy rainfall in the north and along the coast, while the remainder of the state had record high temperatures. Tropical Cyclone Alfred brought severe effects in March 2025.	Below average



Source: Australian Bureau of Meteorology – Climate Summaries.

Adult visitation across demographics

The age profile of adult visitors to NPWS parks continues to get younger over time. In FY24-25 the proportion of adult visitors under the age of 35 was notably higher. Visitation remains slightly skewed towards males.

Chart. Visits by adults to NPWS parks by gender (proportion)

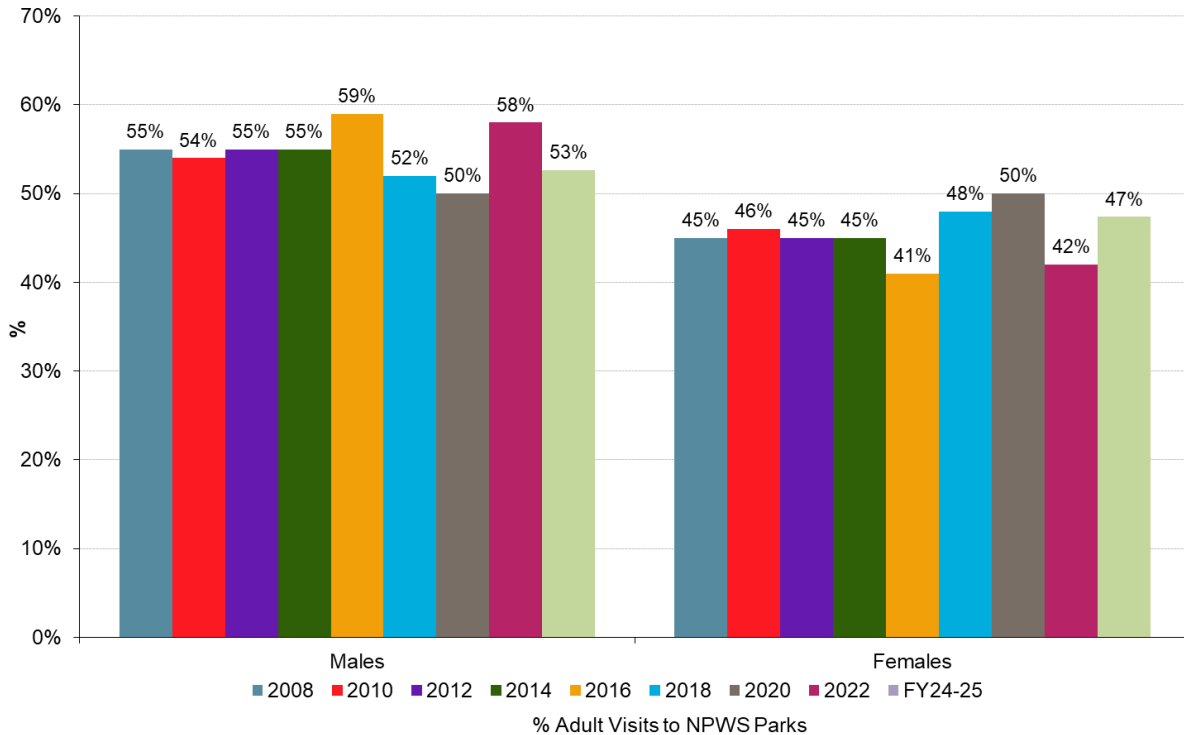
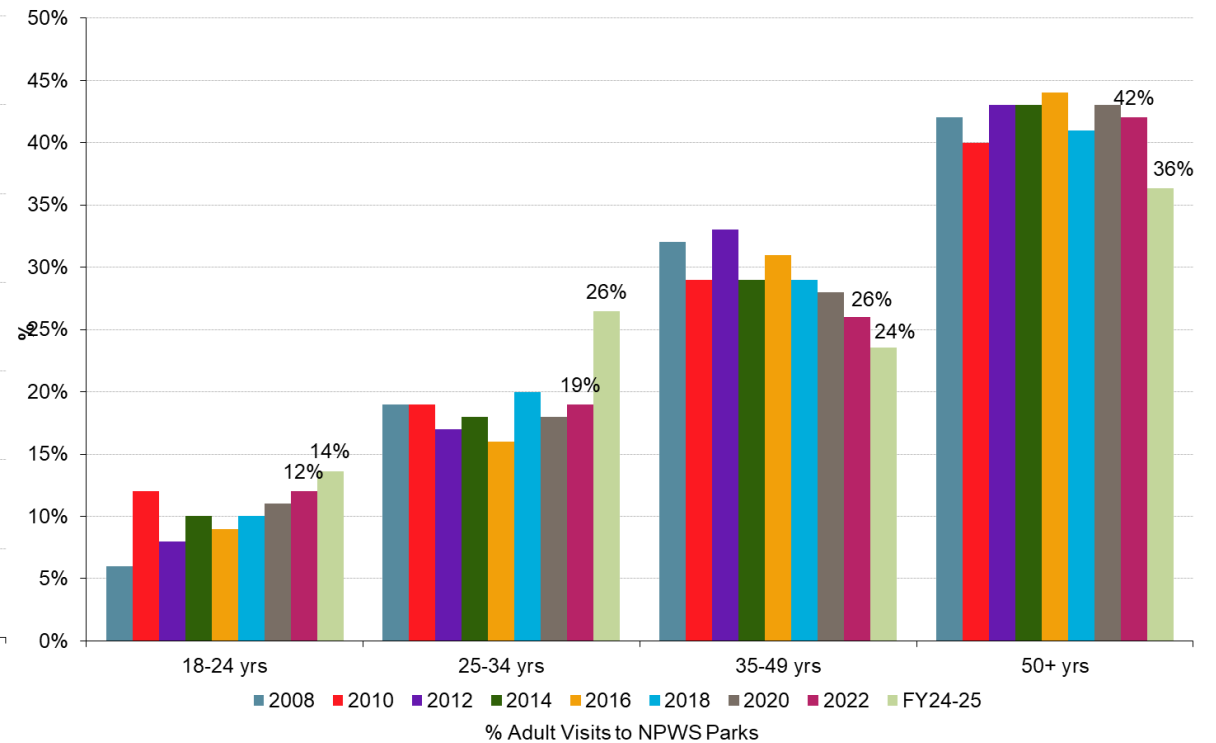


Chart. Visits by adults to NPWS parks by age (proportion)



Adult visitation across demographics (cont'd)

A significant majority of adult visitors to NPWS parks are tertiary educated and employed. However, the proportion of visitors who are tertiary educated was down in FY24-25.

Chart. Visits by adults to NPWS parks by employment (proportion)

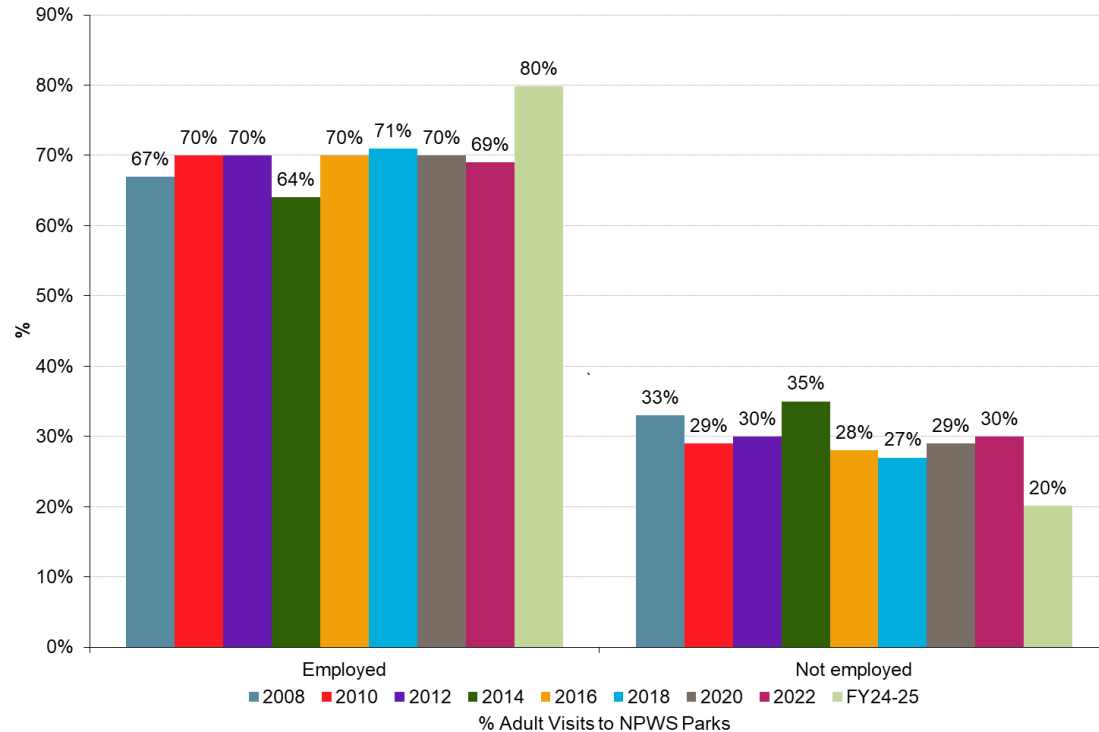
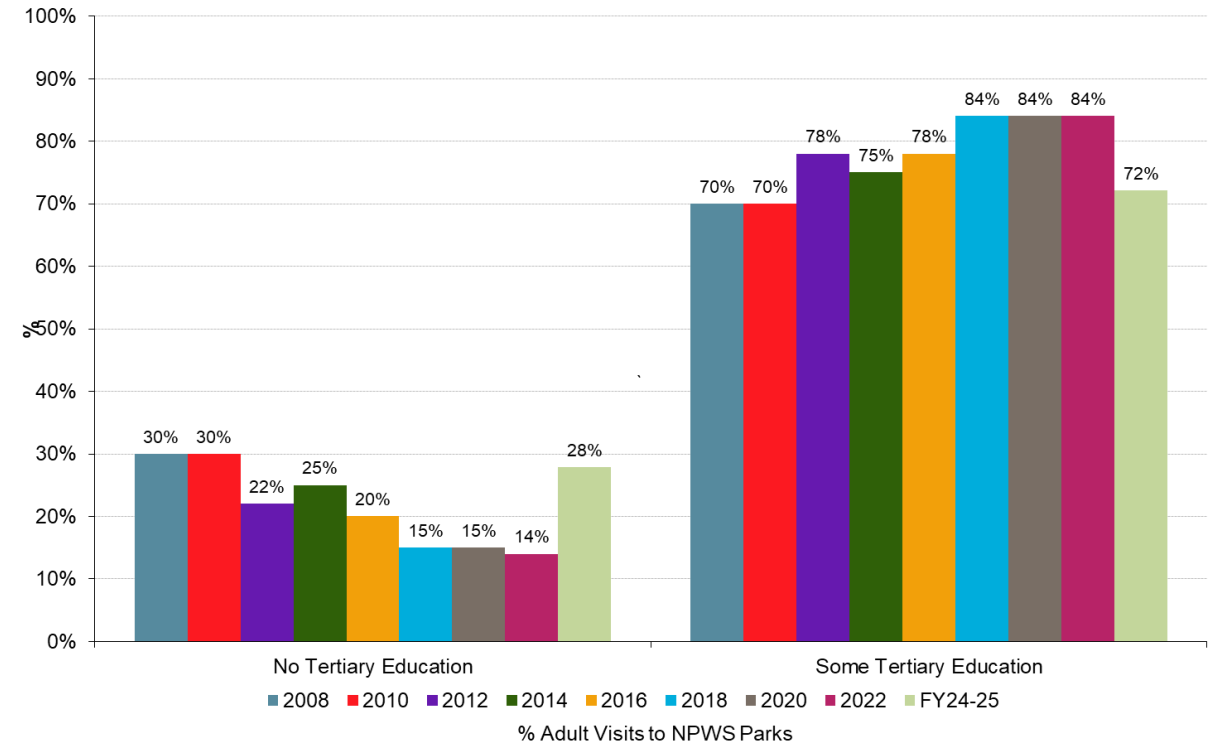


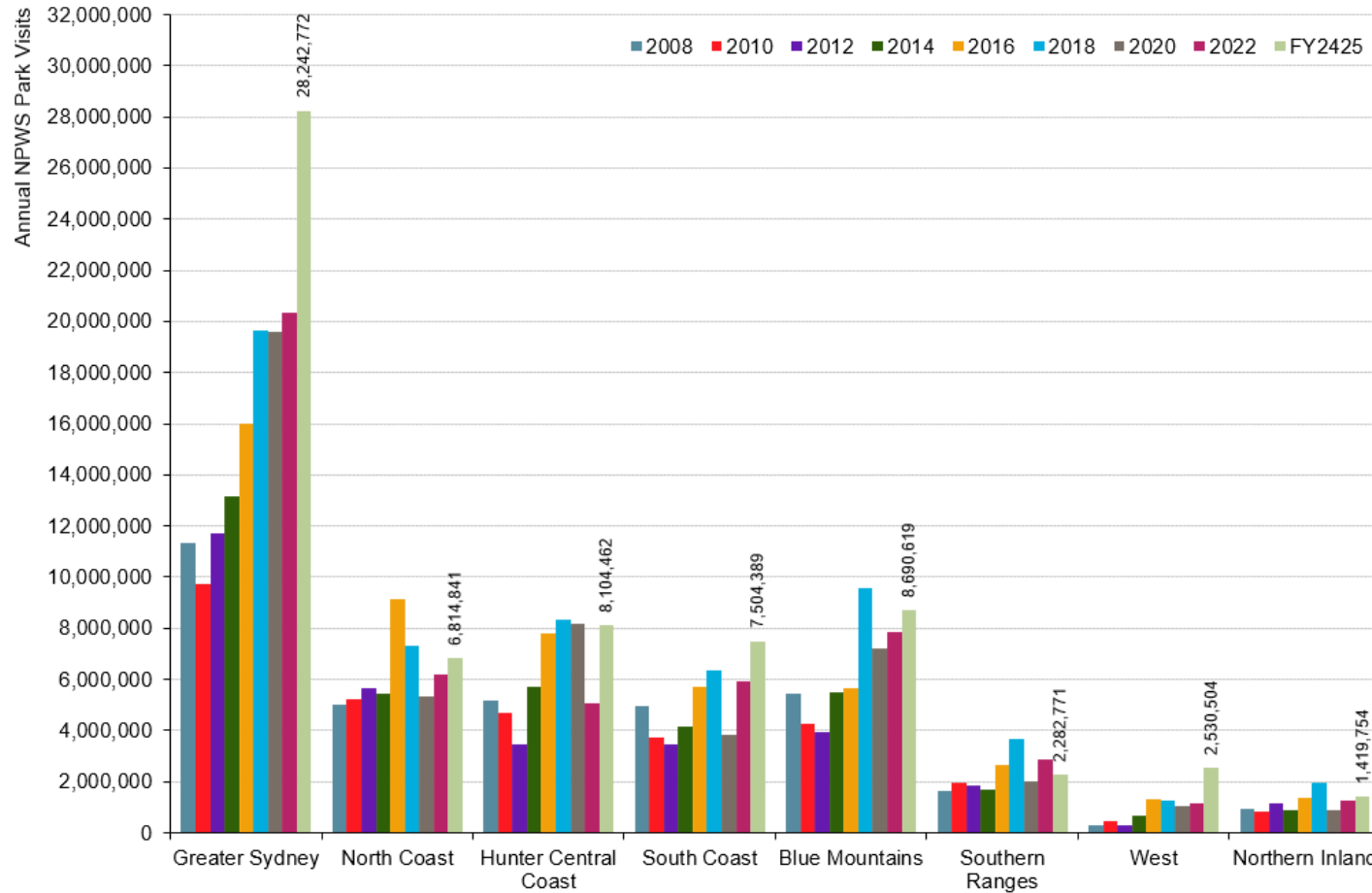
Chart. Visits by adults to NPWS parks by education level (proportion)



NPWS branch visitation

NPWS has eight administrative branches based on geographical region, each including a range of parks offering different experiences and seasonal variations.

Chart. Annual NPWS park visits by branch (number of visits)

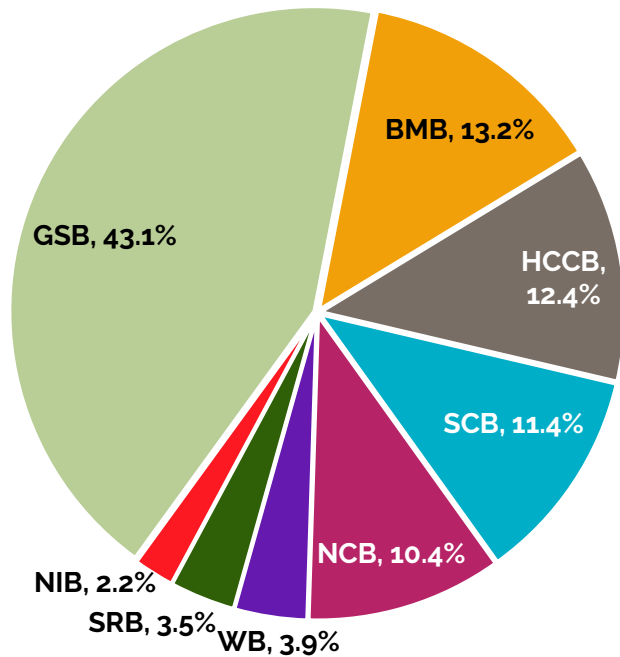


Survey	Greater Sydney	North Coast	Hunter Central Coast	South Coast
FY24-25	28,242,772	6,814,841	8,104,462	7,504,389
2022	20,344,792	6,189,360	5,055,578	5,938,379
2020	19,608,598	5,361,419	8,202,540	3,857,965
2018	19,651,693	7,300,505	8,337,772	6,375,364
2016	15,980,254	9,139,592	7,803,430	5,713,982
2014	13,184,442	5,450,010	5,719,579	4,136,823
2012	11,700,320	5,647,386	3,466,887	3,479,518
2010	9,738,020	5,251,701	4,673,000	3,747,417
2008	11,341,786	5,036,431	5,191,970	4,952,891

Survey	Blue Mountains	Southern Ranges	West	Northern Inland
FY24-25	8,690,619	2,282,771	2,530,504	1,419,754
2022	7,841,868	2,876,405	1,170,223	1,279,940
2020	7,205,953	1,987,759	1,021,098	896,751
2018	9,562,657	3,648,522	1,237,641	1,940,555
2016	5,676,540	2,681,065	1,294,459	1,386,336
2014	5,503,339	1,697,553	693,240	862,316
2012	3,928,926	1,828,317	297,998	1,159,406
2010	4,266,951	1,940,990	461,841	813,810
2008	5,461,318	1,622,269	271,072	924,363

NPWS branch share of visits

Chart. Share of FY24-25 visits by branch (proportion)



- ❖ The Greater Sydney branch continues to attract a higher proportion of visits over time; in FY24-25 it attracted more than **two in five** visits.
- ❖ The Blue Mountains, Hunter Central Coast, South Coast and North Coast branches each attract **10% or more** of visits.
- ❖ The West, Southern Ranges and Northern Inland branches attract between 2-4% of visits.

Table. Share of FY24-25 visits by branch over time (proportion)

Branch	2008	2010	2012	2014	2016	2018	2020	2022	FY24-25
Greater Sydney	29.9%	28.8%	33.0%	33.4%	30.9%	32.6%	39.2%	38.4%	43.1%
Blue Mountains	14.4%	12.6%	11.1%	14.0%	11.0%	16.0%	14.4%	14.8%	13.2%
Hunter Central Coast	13.7%	13.8%	9.8%	14.5%	15.1%	13.7%	16.4%	9.5%	12.4%
South Coast	13.1%	11.1%	9.8%	10.5%	11.1%	10.6%	7.7%	11.2%	11.4%
North Coast	13.3%	15.5%	15.9%	6.2%	17.7%	12.1%	10.7%	11.7%	10.4%
West	0.7%	1.4%	0.8%	1.8%	2.5%	2.5%	2.0%	2.2%	3.9%
Southern Ranges	4.3%	5.7%	5.2%	4.3%	5.2%	6.2%	4.0%	5.4%	3.5%
Northern Inland	2.4%	2.4%	3.3%	2.2%	2.7%	2.6%	1.8%	2.4%	2.2%

NPWS top 20 most visited parks

Table. Top 20 parks by visitation in FY24-25

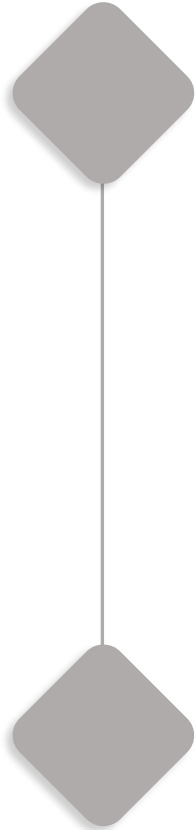
Rank	Park	FY24-25 visitation	Park tier
1	Blue Mountains NP	7,828,608	1
2	Royal NP	4,907,255	1
3	Ku-ring-gai Chase NP	4,302,126	1
4	Lane Cove NP	2,399,260	2
5	Kosciuszko NP	2,355,402	2
6	Sydney Harbour NP	2,208,696	2
7	Brisbane Water NP	2,068,192	2
8	Morton NP	1,889,384	3
9	Bouddi NP	1,573,516	3
10	Glenrock SCA	1,564,384	3

Rank	Park	FY24-25 visitation	Park tier
11	Tomaree NP	1,442,481	3
12	Kamay Botany Bay NP	1,405,052	3
13	Garigal NP	1,388,905	3
14	Eurobodalla NP	1,305,299	3
15	Berowra Valley NP	1,184,377	3
16	Worimi Conservation Lands	1,164,024	3
17	Illawarra Escarpment SCA	1,112,495	3
18	Coffs Coast RP	1,040,218	3
19	Cape Byron SCA	997,706	4
20	Georges River NP	963,684	4

What are the visit volume tiers?

1	More than 4 million visits annually	4	500,000 – 999,999 visits
2	2,000,000-3,999,999 visits	5	100,000 – 499,999 visits
3	1,000,000-1,999,999 visits	6	Less than 100,000 visits

Branch summaries



Blue Mountains branch	Pages 23-24
Greater Sydney branch	Pages 25-26
Hunter Central Coast branch	Pages 27-28
North Coast branch	Pages 29-30
Northern Inland branch	Pages 31-32
South Coast branch	Pages 33-34
Southern Ranges branch	Pages 35-36
West branch	Pages 37-38

NPWS branch summaries: Blue Mountains

The Blue Mountains branch received an estimated **8,690,619** visits in FY24-25. Visits to parks in the Blue Mountains branch make up **13%** of total visits to the state.

Branch visitation over time (millions)

Branch	2008	2010	2012	2014	2016	2018	2020	2022	FY24-25
BMB	5.46	4.26	3.92	5.5	5.67	9.63	7.2	7.84	8.69
NSW	37.92	33.84	35.49	39.43	51.66	60.23	50.05	53	65.6

Visitation by origin (intrastate vs interstate)

Branch	Total visits	Intrastate visits	Interstate visits
Blue Mountains	8,690,619	8,270,384	420,235
Proportion of visits	100%	95.2%	4.8%

Top 3 sources of interstate visitation

Regional VIC (1.8%)	ACT (1.1%)	Regional QLD (0.7%)
---------------------	------------	---------------------

Role of park visit in trip

Branch	Only or main reason	One of the main reasons	A minor reason	Not a reason
BMB	52%	24%	12%	9%
NSW	61%	10%	11%	11%

Top Parks

PARK	TIER
Blue Mountains NP	1
Wollemi NP	4
Kanangra-Boyd NP	5
Dharug NP	5
Thirlmere Lakes NP	5

What are the visit volume tiers?

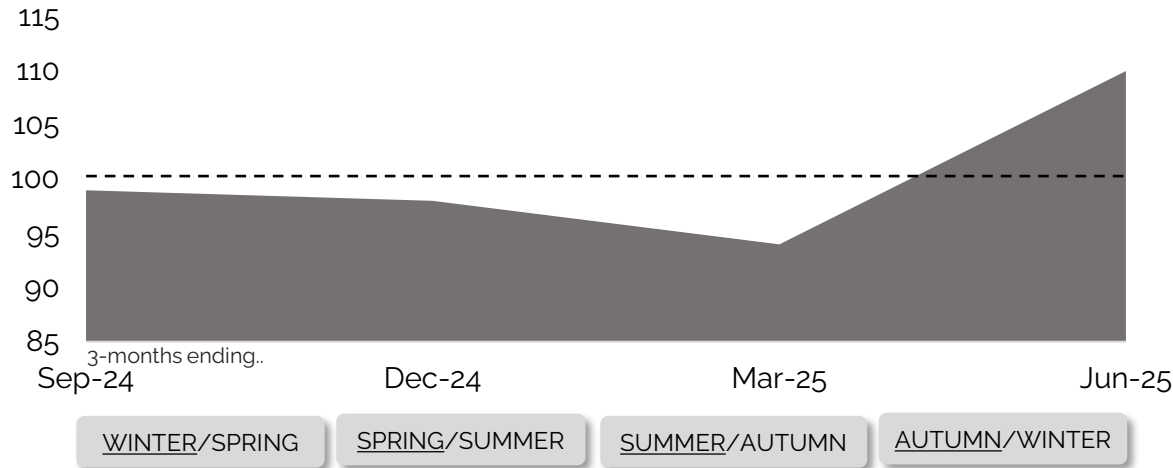
- 1** More than 4 million visits annually
- 2** 2,000,000-3,999,999 visits
- 3** 1,000,000-1,999,999 visits
- 4** 500,000 – 999,999 visits
- 5** 100,000 – 499,999 visits
- 6** Less than 100,000 visits

NPWS branch summaries: Blue Mountains (cont'd)

Seasonality

Blue Mountains visitation peaked in autumn. However, autumn was both the wettest and warmest on record, providing unfavourable conditions for visitation.

Chart. Quarterly park visits to Blue Mountains branch (index)

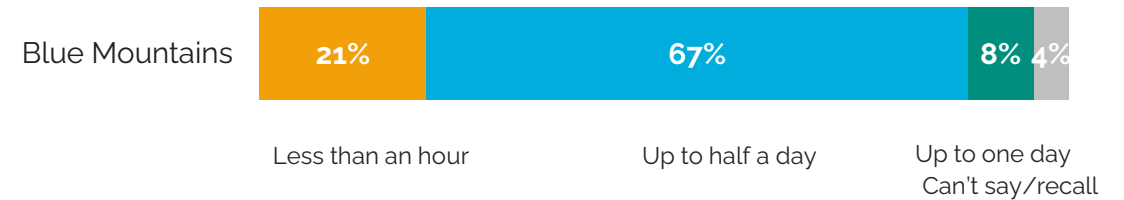


Top activities

Parks in the Blue Mountains branch support a range of activities including touring and sightseeing, walking, picnicking and dining, and photography.

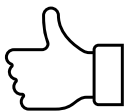
The Blue Mountains sees a higher proportion of walks up to one day.

Chart. Length of walk



Satisfaction

Overall satisfaction with park visits is very high in the branch at **94.7%**.



NPWS branch summaries: Greater Sydney

The Greater Sydney branch received an estimated **28,242,772** visits in FY24-25. Visits to parks in the Greater Sydney branch make up **43%** of total visits to the state.

Branch visitation over time (millions)

Branch	2008	2010	2012	2014	2016	2018	2020	2022	FY24-25
GSB	11.34	9.74	11.7	13.18	15.98	19.65	19.61	20.35	28.24
NSW	37.92	33.84	35.49	39.43	51.66	60.23	50.05	53	65.6

Visitation by origin (intrastate vs interstate)

Branch	Total visits	Intrastate visits	Interstate visits
Greater Sydney	28,242,772	27,173,817	1,068,956
Proportion of visits	100%	96.2%	3.8%

Top 3 sources of interstate visitation

Regional QLD (1.9%)	Melbourne (0.7%)	Brisbane (0.6%)
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Role of park visit in trip

Branch	Only or main reason	One of the main reasons	A minor reason	Not a reason
GSB	79%	8%	5%	4%
NSW	61%	10%	11%	11%

Top Parks

PARK	TIER
Royal NP	1
Ku-ring-gai Chase NP	1
Lane Cove NP	2
Sydney Harbour NP	2
Kamay Botany Bay NP	3

What are the visit volume tiers?

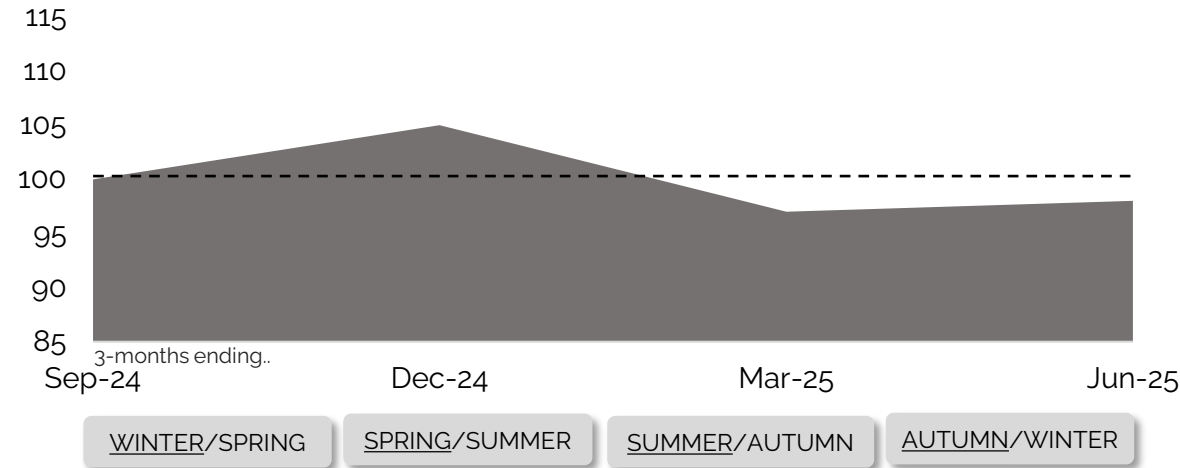
- 1** More than 4 million visits annually
- 2** 2,000,000-3,999,999 visits
- 3** 1,000,000-1,999,999 visits
- 4** 500,000 – 999,999 visits
- 5** 100,000 – 499,999 visits
- 6** Less than 100,000 visits

NPWS branch summaries: Greater Sydney (cont'd)

Seasonality

The Greater Sydney branch is busy year-round but peaks in spring, with residents and travelers flocking to parks as the weather improves.

Chart. Quarterly park visits to Greater Sydney branch (index)

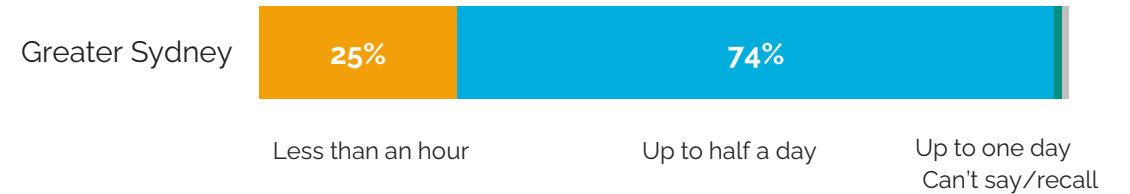


Top activities

Parks in the Greater Sydney branch support a range of activities including walking, picnicking and dining, water-based recreation, rest and relaxation, and touring and sightseeing.

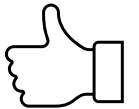
Greater Sydney sees more walks up to half a day.

Chart. Length of walk



Satisfaction

Overall satisfaction with park visits is high in the branch at **89.8%**.



NPWS branch summaries: Hunter Central Coast

The Hunter Central Coast branch received an estimated **8,104,462** visits in FY24-25. Visits to parks in the Hunter Central Coast branch make up **12%** of total visits to the state.

Branch visitation over time (millions)

Branch	2008	2010	2012	2014	2016	2018	2020	2022	FY24-25
HCCB	5.19	4.67	3.47	5.72	7.80	8.34	8.20	5.06	8.10
NSW	37.92	33.84	35.49	39.43	51.66	60.23	50.05	53	65.6

Visitation by origin (intrastate vs interstate)

Branch	Total visits	Intrastate visits	Interstate visits
Hunter Central Coast	8,104,462	7,755,860	348,602
Proportion of visits	100%	95.7%	4.3%

Top 3 sources of interstate visitation

Adelaide (1.5%)	Melbourne (1.4%)	Perth (1.1%)
-----------------	------------------	--------------

Role of park visit in trip

Branch	Only or main reason	One of the main reasons	A minor reason	Not a reason
HCCB	72%	8%	12%	6%
NSW	61%	10%	11%	11%

Top Parks

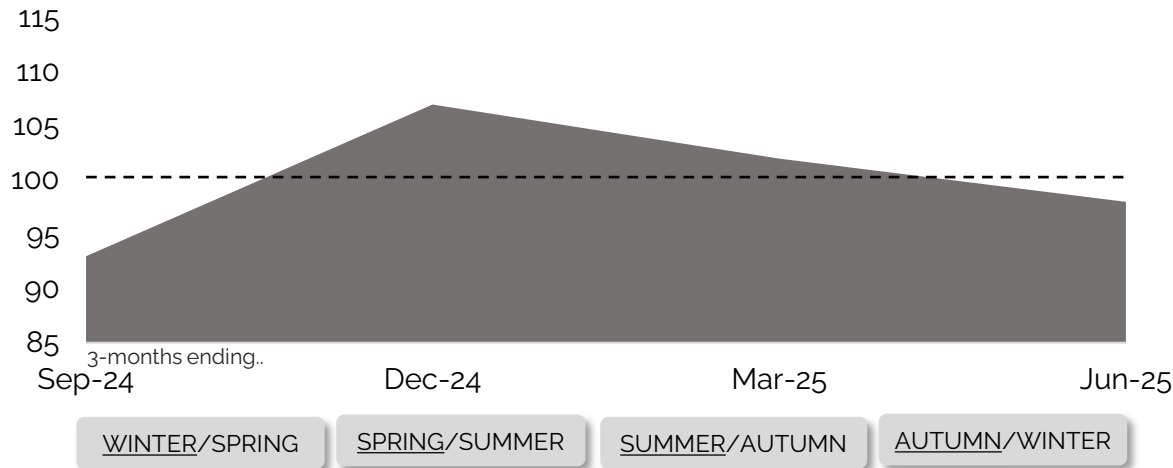
PARK	TIER	What are the visit volume tiers?
Brisbane Water NP	2	1 More than 4 million visits annually
Bouddi NP	3	2 2,000,000-3,999,999 visits
Glenrock SCA	3	3 1,000,000-1,999,999 visits
Tomaree NP	3	4 500,000 – 999,999 visits
Worimi Conservation Lands	3	5 100,000 – 499,999 visits
		6 Less than 100,000 visits

NPWS branch summaries: Hunter Central Coast (cont'd)

Seasonality

The Hunter Central Coast branch is busy year-round but peaks in spring, with residents and travelers flocking to parks as the weather improves.

Chart. Quarterly park visits to Hunter Central Coast branch (index)

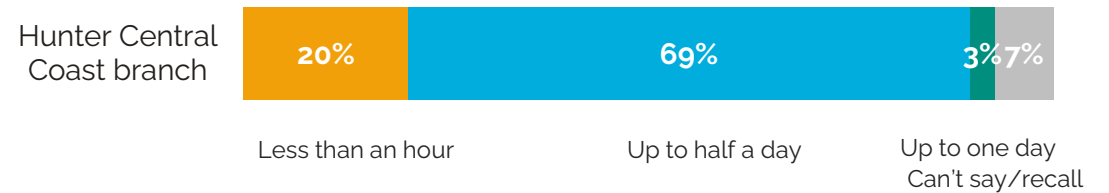


Top activities

Parks in the Hunter Central Coast branch support a range of activities including walking, touring and sightseeing, rest and relaxation, photography, and nature appreciation.

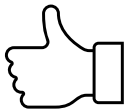
Hunter Central Coast has fewer walks less than an hour.

Chart. Length of walk



Satisfaction

Overall satisfaction with park visits is high in the branch at **85.9%**.



NPWS branch summaries: North Coast

The North Coast branch received an estimated **6,814,841** visits in FY24-25. Visits to parks in the North Coast branch make up **10%** of total visits to the state.

Branch visitation over time (millions)

Branch	2008	2010	2012	2014	2016	2018	2020	2022	FY24-25
NCB	5.04	5.25	5.65	5.45	9.14	7.30	5.36	6.19	6.81
NSW	37.92	33.84	35.49	39.43	51.66	60.23	50.05	53	65.6

Visitation by origin (intrastate vs interstate)

Branch	Total visits	Intrastate visits	Interstate visits
North Coast	6,814,841	4,196,841	2,618,001
Proportion of visits	100%	61.6%	38.4%

Top 3 sources of interstate visitation

Regional QLD (19%)	Brisbane (11%)	Melbourne (7.2%)
--------------------	----------------	------------------

Role of park visit in trip

Branch	Only or main reason	One of the main reasons	A minor reason	Not a reason
NCB	52%	8%	18%	17%
NSW	61%	10%	11%	11%

Top Parks

PARK	TIER
Coffs Coast RP	3
Cape Byron SCA	4
Crowdy Bay NP	4
Arakoon NP	4
Bundjalung NP	4

What are the visit volume tiers?

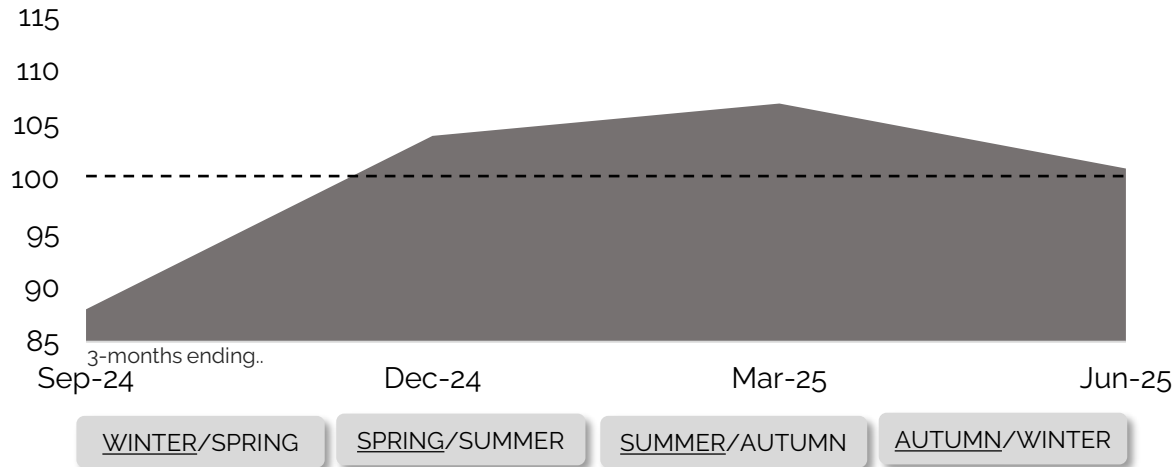
- 1** More than 4 million visits annually
- 2** 2,000,000-3,999,999 visits
- 3** 1,000,000-1,999,999 visits
- 4** 500,000 – 999,999 visits
- 5** 100,000 – 499,999 visits
- 6** Less than 100,000 visits

NPWS branch summaries: North Coast (cont'd)

Seasonality

Visitation to the North Coast branch peaks in summer and remains busy in spring and autumn but has notably lower visitation in winter.

Chart. Quarterly park visits to North Coast branch (index)



Top activities

Parks in the North Coast branch support a range of activities including walking, touring and sightseeing, rest and relaxation, nature appreciation, picnicking and dining, water-based recreation, and socialising.

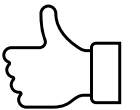
North Coast has a higher proportion of walks less than an hour.

Chart. Length of walk



Satisfaction

Overall satisfaction with park visits is very high in the branch at **95.5%**.



NPWS branch summaries: Northern Inland

The Northern Inland branch received an estimated **1,419,754** visits in FY24-25. Visits to parks in the Northern Inland branch make up **2%** of total visits to the state.

Branch visitation over time (millions)

Branch	2008	2010	2012	2014	2016	2018	2020	2022	FY24-25
NIB	0.92	0.81	1.16	0.86	1.39	1.94	0.88	1.28	1.42
NSW	37.92	33.84	35.49	39.43	51.66	60.23	50.05	53	65.6

Visitation by origin (intrastate vs interstate)

Branch	Total visits	Intrastate visits	Interstate visits
Northern Inland	1,419,754	752,064	667,690
Proportion of visits	100%	53%	47%

Top 3 sources of interstate visitation

Brisbane (21.7%)	Regional QLD (13%)	Regional SA & NT (7.8%)
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Role of park visit in trip

Branch	Only or main reason	One of the main reasons	A minor reason	Not a reason
NIB	50%	0%	32%	9%
NSW	61%	10%	11%	11%

Top Parks

PARK	TIER
Oxley Wild Rivers NP	5
Warrumbungle NP	5
Bald Rock NP	5
Guy Fawkes River Reserves	5
Pilliga Reserves	6

What are the visit volume tiers?

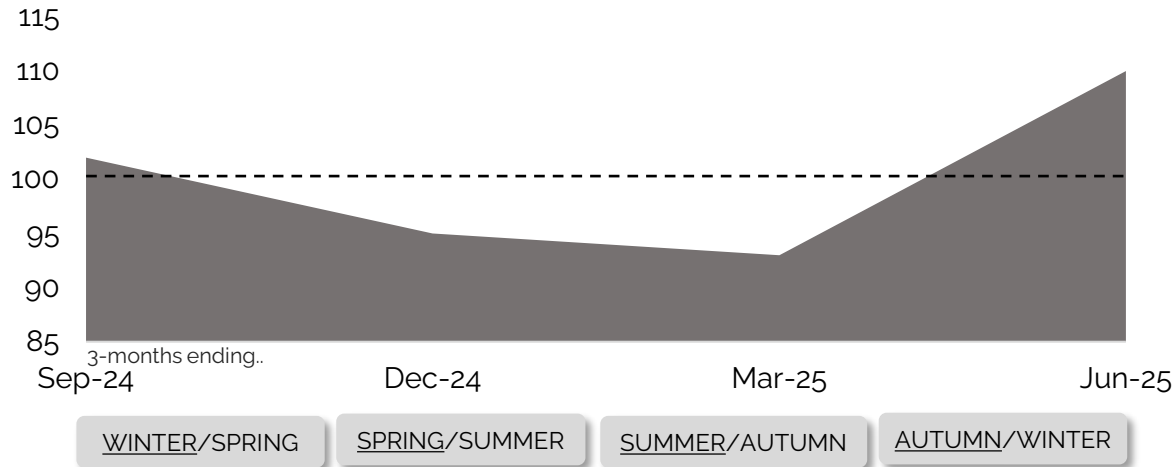
- 1** More than 4 million visits annually
- 2** 2,000,000-3,999,999 visits
- 3** 1,000,000-1,999,999 visits
- 4** 500,000 – 999,999 visits
- 5** 100,000 – 499,999 visits
- 6** Less than 100,000 visits

NPWS branch summaries: Northern Inland (cont'd)

Seasonality

Northern Inland visitation peaked in autumn.

Chart. Quarterly park visits to Northern Inland branch (index)



Top activities

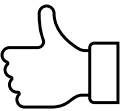
Parks in the Northern Inland branch support activities including walking, photography, and nature appreciation.

Chart. Length of walk

Sample size of people walking too low to report length of walk.

Satisfaction

Overall satisfaction with park visits is very high in the branch at **96.9%**.



NPWS branch summaries: South Coast

The South Coast branch received an estimated **7,504,389** visits in FY24-25. Visits to parks in the South Coast branch make up **11%** of total visits to the state.

Branch visitation over time (millions)

Branch	2008	2010	2012	2014	2016	2018	2020	2022	FY24-25
SCB	4.95	3.75	3.48	4.14	5.71	6.38	3.86	5.94	7.50
NSW	37.92	33.84	35.49	39.43	51.66	60.23	50.05	53	65.6

Visitation by origin (intrastate vs interstate)

Branch	Total visits	Intrastate visits	Interstate visits
South Coast	7,504,389	4,952,770	2,551,619
Proportion of visits	100%	66%	34%

Top 3 sources of interstate visitation

ACT (16.3%)	Melbourne (12.1%)	Regional VIC (2.5%)
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Role of park visit in trip

Branch	Only or main reason	One of the main reasons	A minor reason	Not a reason
SCB	43%	8%	22%	23%
NSW	61%	10%	11%	11%

Top Parks

PARK	TIER
Morton NP	3
Eurobodalla NP	3
Illawarra Escarpment SCA	3
Jervis Bay NP	4
Murramarang NP	4

What are the visit volume tiers?

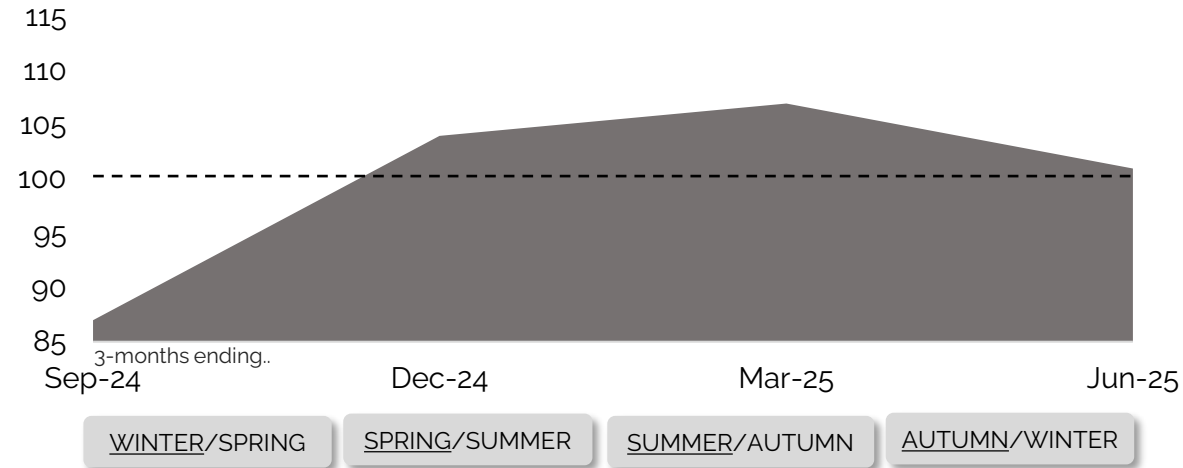
- 1** More than 4 million visits annually
- 2** 2,000,000-3,999,999 visits
- 3** 1,000,000-1,999,999 visits
- 4** 500,000 – 999,999 visits
- 5** 100,000 – 499,999 visits
- 6** Less than 100,000 visits

NPWS branch summaries: South Coast (cont'd)

Seasonality

Visits to the South Coast branch peak in summer but its also relatively busy in spring and autumn, aligning with the sunnier seasons.

Chart. Quarterly park visits to South Coast branch (index)

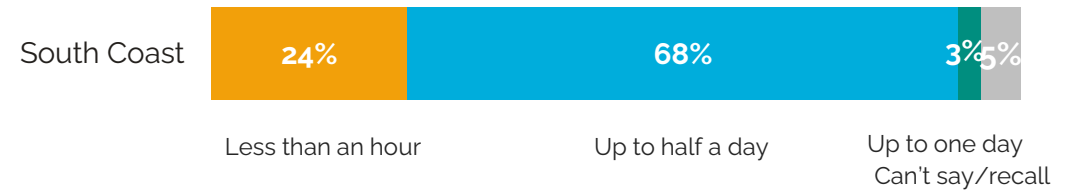


Top activities

Parks in the South Coast branch support a range of activities including walking, touring and sightseeing, rest and relaxation, nature appreciation, camping and accommodation, and water-based recreation.

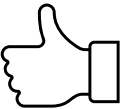
Most walks last up to half a day in the South Coast branch.

Chart. Length of walk



Satisfaction

Overall satisfaction with park visits is very high in the branch at **93.4%**.



NPWS branch summaries: Southern Ranges

The Southern Ranges branch received an estimated **2,282,771** visits in FY24-25. Visits to parks in the Southern Ranges branch make up **3.5%** of total visits to the state.

Branch visitation over time (millions)

Branch	2008	2010	2012	2014	2016	2018	2020	2022	FY24-25
SRB	1.62	1.94	1.83	1.70	2.68	3.65	1.98	2.87	2.28
NSW	37.92	33.84	35.49	39.43	51.66	60.23	50.05	53	65.6

Visitation by origin (intrastate vs interstate)

Branch	Total visits	Intrastate visits	Interstate visits
Southern Ranges	2,282,771	1,855,902	426,869
Proportion of visits	100%	81.3%	18.7%

Top 3 sources of interstate visitation

ACT (11.2%)	Regional SA & NT (3.3%)	Regional VIC (2.3%)
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Role of park visit in trip

Branch	Only or main reason	One of the main reasons	A minor reason	Not a reason
SRB	42%	25%	16%	11%
NSW	61%	10%	11%	11%

Top Parks

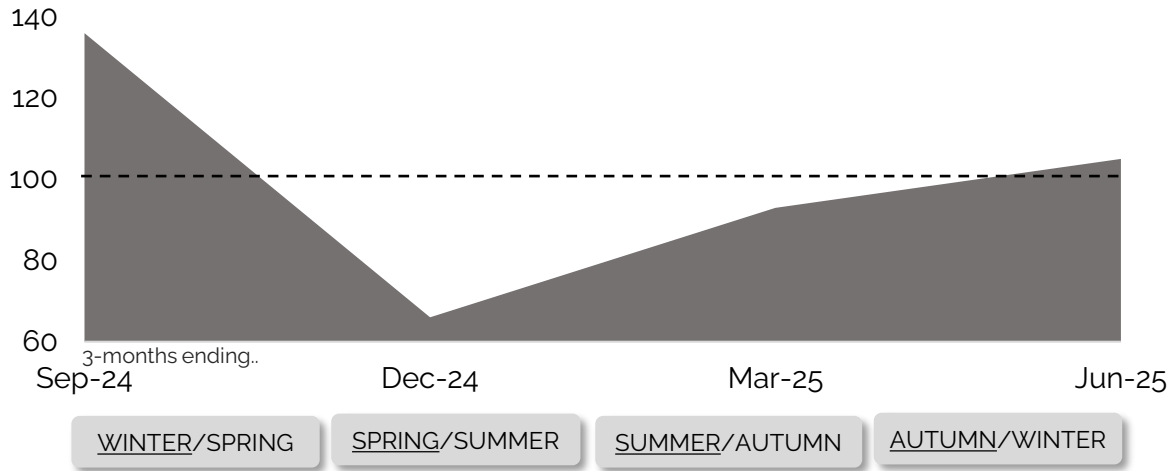
PARK	TIER	What are the visit volume tiers?
Kosciuszko NP	2	1 More than 4 million visits annually
Brindabella NP	5	2 2,000,000-3,999,999 visits
Murrumbidgee Valley NP	6	3 1,000,000-1,999,999 visits
The Rock NR	6	4 500,000 – 999,999 visits
Wereboldera SCA	6	5 100,000 – 499,999 visits
		6 Less than 100,000 visits

NPWS branch summaries: Southern Ranges (cont'd)

Seasonality

The Southern Ranges branch stands out, peaking in winter, driven by visitation to Kosciuszko national park.

Chart. Quarterly park visits to Southern Ranges branch (index)

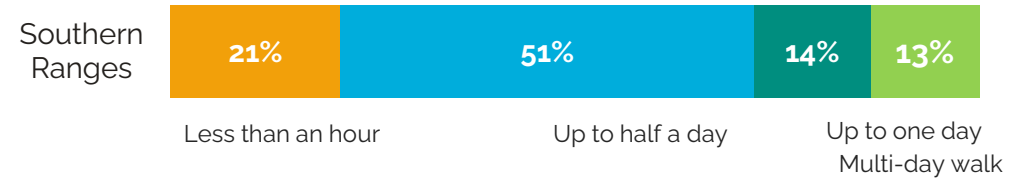


Top activities

Parks in the Southern Ranges branch support a range of activities including walking, touring and sightseeing, camping and accommodation, water-based recreation, snow sports, and rest and relaxation.

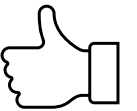
Southern Ranges sees longer walks, with a higher proportion of walks up to one day and a higher proportion of multi-day walks.

Chart. Length of walk



Satisfaction

Overall satisfaction with park visits is moderate in the branch at **79.3%**.



NPWS branch summaries: West

The West branch received an estimated **2,530,504** visits in FY24-25. Visits to parks in the West branch make up **4%** of total visits to the state.

Branch visitation over time (millions)

Branch	2008	2010	2012	2014	2016	2018	2020	2022	FY24-25
WB	0.27	0.46	0.30	0.69	1.29	1.24	1.02	1.17	2.53
NSW	37.92	33.84	35.49	39.43	51.66	60.23	50.05	53	65.6

Visitation by origin (intrastate vs interstate)

Branch	Total visits	Intrastate visits	Interstate visits
West	2,530,504	986,493	1,544,011
Proportion of visits	100%	39%	61%

Top 3 sources of interstate visitation

Regional VIC (34.2%)	Melbourne (15.5%)	Brisbane (11.3%)
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Role of park visit in trip

Branch	Only or main reason	One of the main reasons	A minor reason	Not a reason
WB	33%	0%	28%	32%
NSW	61%	10%	11%	11%

Top Parks

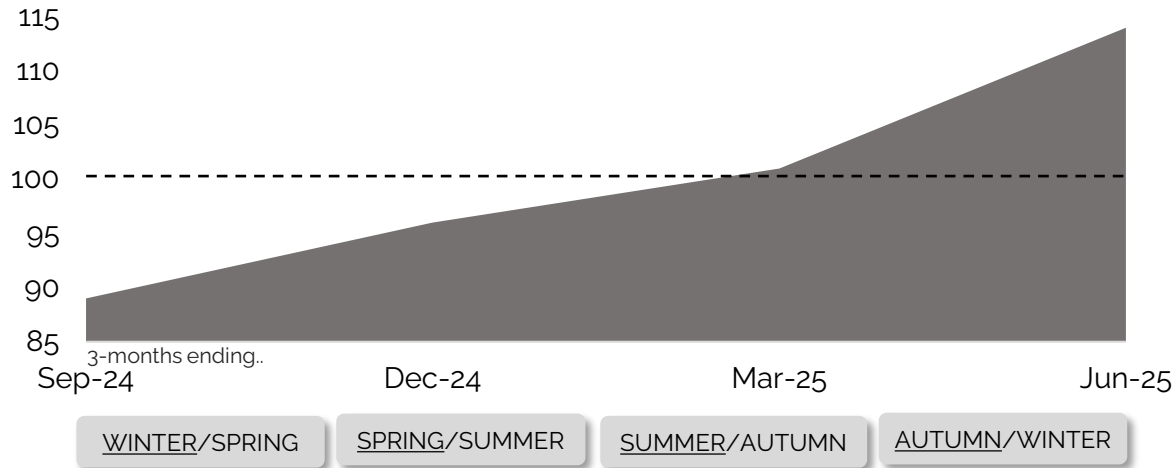
PARK	TIER	What are the visit volume tiers?
Murray Valley NP	5	1 More than 4 million visits annually
Murray Valley RP	5	2 2,000,000-3,999,999 visits
Mount Canobolas SCA	5	3 1,000,000-1,999,999 visits
Murrumbidgee Valley NP	6	4 500,000 – 999,999 visits
Mungo Reserves	6	5 100,000 – 499,999 visits
		6 Less than 100,000 visits

NPWS branch summaries: West (cont'd)

Seasonality

Visits to the West branch peak in autumn when the conditions for travel and sightseeing are more favourable.

Chart. Quarterly park visits to West branch (index)



Top activities

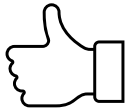
Parks in the West branch support a range of activities including walking, touring and sightseeing, camping and accommodation, nature appreciation, Aboriginal heritage appreciation, and picnicking and dining.

Chart. Length of walk

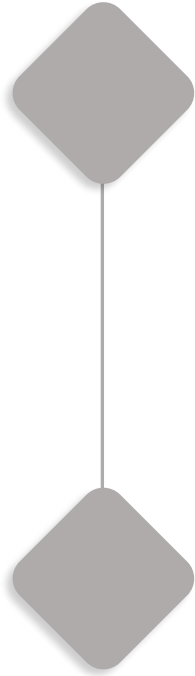
Sample size of people walking too low to report length of walk.

Satisfaction

Overall satisfaction with park visits is high in the branch at **88.0%**.



Background, methodology and sample



Updated methodology for FY24-25	Page 40
Improved sampling	Page 42
Break in series	Page 42
Using mobile device movement data to complement and integrate with the survey data	Page 43

Updated methodology for FY24-25

In FY24-25 the PVS shifted to a multi-mode data collection embedded within Roy Morgan Single Source; a short telephone survey followed by a detailed self-complete online survey. Additionally, mobile device movement data is being incorporated for the first time.

Why we changed methodology

Over time declining telephone survey (CATI) responses rates made it increasingly difficult and expensive to continue conducting the full PVS survey via telephone. Industry wide, population surveys have adopted online methods. Additionally, NPWS reporting needs evolved over time:

- ❖ Base reporting on financial year rather than calendar year to better integrate with operational and reporting needs.
- ❖ Generate reliable visit estimates for as many individual parks as practical. The previous methodology was never designed or optimised to deliver estimates of visits to individual parks.

FY24-25 methodology

The research methodology for FY24-25 was modified as follows:

After a pilot study in 2024, existing PVS survey questions were embedded within the Roy Morgan Single Source suite

- ❖ Now surveying approximately 24,000 people per annum as part of the Single Source Life Experiences and Opinions Survey (LEO) using a telephone (CATI) collection approach.
- ❖ Additionally surveying approximately 17,000 people per annum using Roy Morgan's Single Source online journal to capture data on all variables traditionally captured in the PVS.
- ❖ Importantly, Roy Morgan uses a probability sample for Single Source ensuring a representative sample of all Australians, who each have an equal chance of being invited to complete the research. This is a significant change for the PVS, which used to focus sampling on eastern seaboard residents.

Anonymised mobile device movement data was incorporated to inform measures such as seasonal visitation.

To support continuity, the same questions as asked in previous surveys were used to collect visitation data, but they are now administered in both CATI and online modes. CATI responses were used to calibrate the online responses for visitation. The online survey was used to identify the park(s) visited and administer questions relating to park behaviour and experiences which were also in previous surveys.

Improved sampling

A key benefit of integrating the PVS into Roy Morgan's Single Source is that for the first time the PVS has been asked among a representative sample of all Australians. **17,072** respondents completed the PVS survey in FY24-25. This includes a robust sample in each state. Previously NPWS visitation originating from SA, WA, TAS and NT was estimated (see note below)

Table. Number of respondents surveyed

Resident Area	FY24-25	2022
NSW (excl. ACT)	5,398	5,859
Interstate	11,674	9,764
Total	17,072	15,623

The seven regions surveyed in 2022 and prior surveys were chosen because their overall share of visits to and within NSW was the highest based on Roy Morgan's Holiday Tracking Survey (HTS) data. Visitation from all other regions of Australia which were not surveyed had NPWS park visitation estimated using HTS data.

Table. Number of respondents surveyed by origin

Resident Area	FY24-25	2022
Sydney	3,626	3,255
Regional NSW (excl. ACT)	1,772	2,604
ACT	391	1,953
Melbourne	3,269	2,604
Regional VIC	1,123	1,302
Brisbane	1,585	1,953
Regional QLD	1,604	1,953
Perth	1,362	0
Regional WA	342	0
Adelaide	1,056	0
Regional SA	340	0
TAS	474	0
NT	128	0
Total	17,072	15,623

The confidence interval for the survey estimate in FY24-25 is $\pm 7.2\%$ for the total estimate ($\pm 5.0\%$ for adults; $\pm 11.8\%$ for children).

Break in series

- ❖ When changes are made to the methodology there can often be what is known as a break in series. We've done all we can to minimise this issue for the FY24-25. It is, however, impossible to account for all possible effects and it should be noted that many of these effects are positive in terms of improving the overall accuracy and on-going sustainability of the survey. By adding data sources, Roy Morgan is ensuring the accuracy of the NPWS visitation data is continuously improving.
- ❖ However, caution is required when comparing some of the results of the latest survey with previous surveys. In some instances, it is not possible to compare the latest data with historical data.
- ❖ As part of the bedding down process for the new survey methodology, how some questions are administered will be further improved for the FY25-26 survey to ensure stability, and as surveying now continues on an annual cycle, the overall integrity of the time-series will be rapidly re-established, building new benchmarks.

How does the FY24-25 methodology impact historical comparison?

Change from CATI to online:

Moving from a fully interviewer assisted telephone (CATI) survey to a self-complete online survey means the survey data has tended to shift – this primarily relates to the additional questions on behaviour and experience that are asked after visitation. There were also some technical issues which have been addressed for the FY25-26 PVS.

Which metrics can't be compared to historical data?

Satisfaction: These results have tended to moved away from the extremes and more towards the mid-point. This aligns with the recognised tendency for responses to self-complete surveys to more commonly reflect the mid-point compared to interviewer assisted surveys.

Activities: This question changed from an open-ended question to a prompted list of responses. When prompted by the list, respondents select more activities, so the relevant percentages are typically higher. Additionally, prompting can mean there are activities being selected that may have been less top of mind. While the relative ranking of activities remains generally consistent, stated incidence varies from previous surveys.

Using mobile device movement data to complement and integrate with the survey data

Privacy safe, always on mobile device movement data has been generated for some individual parks and reserves, which together account for an estimated **85-90%** of all visitation to NPWS parks. The ability to measure visitation to individual parks is not available through the PVS survey methodology.

Innovation and continuous improvement is critical to the long-term efficacy of park visitation data. The change in methodology for FY24-25 provided an opportunity to integrate a new complementary data source to help reliably measure visitation at the park level. Privacy-safe mobile device movement data is now being trialled.

A key strength of the mobile device movement data is that it is 'always on', automatic and as close to a census of visitors as is currently possible.

To ensure privacy the location component of the mobile device movement data is only available at the Australian Bureau of Statistics (ABS) statistical area 1 (SA1) level. Park boundaries are matched to these SA1s to generate the visitation data. In the many cases wherein park boundaries don't neatly align with SA1s, official ABS land use data is also used to adjust estimates to discount non-park uses such as commercial businesses or residential housing. The data is also calibrated to include children and weighted up to represent the full population.

Parks Visitor Survey

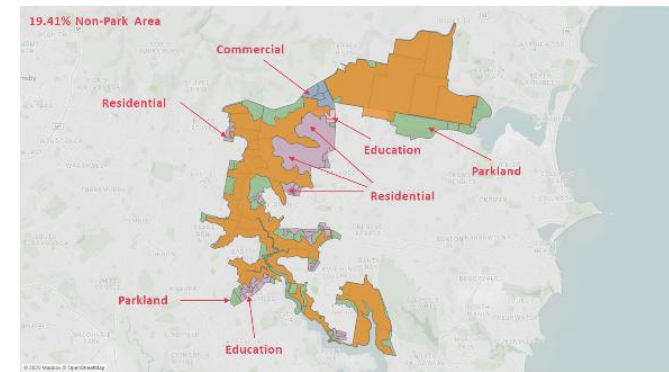
The survey data and mobile device movement data

The when are where

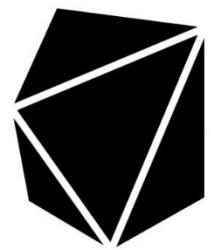


The survey data

The who and the why



Note that the mobile device movement data is based on mobile use by domestic residents and does not include international visitors, aligning with the survey data. International visitors who purchase temporary SIM-cards are excluded from the dataset.



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