

**NATURE
TOURISM
IN AUSTRALIA
2007**

Snapshot

Domestic and international visitors participate in a range of activities while travelling in Australia. This snapshot presents a profile of domestic and international visitors who participated in nature activities during 2007.

Definition

A nature visitor is a domestic or international visitor who participated in at least one of the following seven nature activities while travelling in Australia in 2007:

- Visit National parks or State parks
- Visit wildlife parks, zoos or aquariums
- Visit botanical or other public gardens
- Bushwalking or rainforest walks
- Whale or dolphin watching (in the ocean)
- Snorkelling
- Scuba diving

These seven activities are included in the Tourism Research Australia National Visitor Survey (NVS) and International Visitor Survey (IVS) questionnaires. These visitors may also participate in other tourism activities.

What are the recent visitor trends?

Domestic visitors comprise the majority of all nature visitors, split fairly evenly by day (14.6 million) and overnight visitors (14.8 million).

Participation in nature activities increased steadily in the domestic overnight market between 2005 and 2007. This growth exceeded that of the total domestic overnight market and increased the nature tourism market share from 18% in 2005 to 20% in 2007.

Day visitors experienced a strong increase during 2007 in the number of nature visitors (17%). This exceeded overall growth in day visitors (10%). Market share has remained fairly flat for day nature visitors (10%).

The number of international visitors participating in nature activities has remained relatively stable since 2005. While there were still around 3.4 million international nature visitors in 2007, they represent less of the total international population (66%) than in 2005 (69%).

Table 1 Number of visitors who participated in nature activities, 2005–2007

	Total visitors			% change 2006-2007
	2005	2006	2007	
Domestic overnight				
Number of visitors (million)	12.27	13.15	14.83	13%
Share ^a of total (%)	18	18	20	
Domestic day				
Number of visitors (million)	12.57	12.44	14.55	17%
Share ^a of total (%)	10	9	10	
International				
Number of visitors (million)	3.46	3.43	3.45	1%
Share ^a of total (%)	69	67	66	

How much do they spend?

Domestic overnight nature visitors spent more per person (\$919) than other domestic overnight visitors (\$507 per person) and slightly more per night (\$154) than other visitors (\$149 per night). Domestic overnight nature visitors spent \$13.6 billion on their entire trip during 2007. Other than accommodation, food and beverages (51% of spend), domestic overnight nature visitors spent the most on transport other than airfares (15%). Domestic day nature visitors spent \$93 per person which was less than other visitors who spent around \$100 per trip.

Table 2 Total expenditure by visitors who participated in nature activities, 2005–2007

	Total expenditure		
	2005	2006	2007
Domestic overnight			
Amount (\$ million)	10 537	12 341	13 596
Share of total (%)	27	30	31
Domestic day			
Amount (\$ million)	1 194	1 148	1 351
Share of total (%)	10	9	9
International			
Amount (\$ million)	9 470	10 647	11 763
Share of total (%)	78	76	76

International nature visitors spent around \$11.8 billion dollars in 2007. This was \$3,414 per person and \$94 per night. Other than accommodation, food

and beverages (46% of spend), international nature visitors spent the most on education and shopping (16% and 14% of spend respectively).

Nature visitors from Singapore had the highest spend per night (\$147). However, they represent only 3% of the international nature market. While New Zealand and Japan are in the top three countries in terms of nature visitor numbers, they have the lowest spend per visitor. This can largely be attributed to their shorter length of stay (19 nights and 21 nights respectively). Nature visitors from Germany (51 nights) and Korea (50 nights) had the longest average stay.

Table 3 Country of international nature visitors, 2007

Country	Nature visitors %	Average stay Nights	Expenditure	
			Per visitor \$	Per night \$
United Kingdom	15	37	3 377	91
New Zealand	13	19	1 939	104
Japan	12	21	1 841	87
USA	9	26	3 184	122
China	8	43	3 888	89
Korea	5	50	4 293	85
Germany	4	51	3 997	78
Singapore	3	30	4 369	147
Other Europe	11	50	4 295	86
Other Asia	13	47	4 276	92
Other countries	8	45	4 222	95
Total	100	36	3 414	94

What do they do?

'Bushwalking/rainforest walks' and 'Visit National parks/State parks' were the most popular nature activities for domestic overnight (52% and 46% respectively) and domestic day visitors (37% and 42% respectively).

'Visit National parks/State parks' (67%) and 'Visit wildlife parks, zoos and aquariums' (60%) were the top two nature activities for international nature visitors in 2007. 'Visit botanical or other public gardens' experienced the strongest growth in 2007, increasing by 6%. International visitors were more likely to participate in more nature activities per person (2.6 activities) than domestic overnight visitors (1.4 activities).

Table 4 Proportion of visitors by type of nature activity, 2007

Type of nature activities	Domestic overnight	Domestic day %	International
Bushwalking/ rainforest walks	52	37	39
National parks/ State parks	46	42	67
Botanical or other public gardens	20	27	55
Wildlife parks/zoos/ aquariums	16	14	60
Whale or dolphin watching	3	2	13
Snorkelling	5	1	18
Scuba diving	1	1	7
Total nature visitors (million)	14.8	14.6	3.4

Who are they?

Domestic overnight nature visitors travelled as an adult couple (32%), with a family group (29%) or with friends and relatives (24%) and were less likely to be travelling unaccompanied (11%) than other domestic overnight visitors (30%).

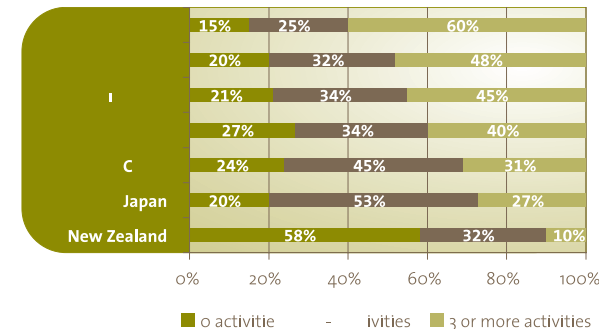
International nature visitors were more likely to travel unaccompanied (45%) or as adult couples (28%). International visitors became more likely to travel as an adult couple as they participated in more nature activities and less likely to travel unaccompanied. International nature visitors were more likely to be aged between 20 and 29 years (28%).

Visitors from the United Kingdom (15%), New Zealand (13%) and Japan (12%) represented the largest number of nature visitors during 2007. These were the three largest markets to visit Australia during 2007.

European visitors were more likely than other visitors to participate in nature based activities (80%). Of these visitors, 62% participated in 3 or more nature activities, compared to 38% that participated in only 1 or 2 nature activities. Visitors from Switzerland

(63%), Germany (60%), and Netherlands (57%) were the most likely to participate in 3 or more nature activities. Visitors from New Zealand (58%) and many of the Asian countries including Singapore (48%) were the most likely not to participate in any nature activities.

Figure 1 Participation in nature activities by Tier 1 markets, 2007



How long do they stay?

Nature visitors who stayed longer tended to participate in more nature activities. International visitors who did not participate in nature activities stayed on average 19 nights, compared to nature visitors who participated in 1-2 nature activities (30 nights) or 3 or more nature activities (44 nights).

This was also true for domestic overnight visitors. Visitors who did not participate in any nature activities stayed on average 3 nights, compared to 6 nights for visitors participating in 1-2 nature activities and 11 nights for visitors participating in 3 or more nature activities.

Why do they travel?

Domestic overnight and day nature visitors travelled for the purpose of holiday (67% and 77% respectively) or to visit friends and relatives (24% and 15% respectively). Less than 10% of domestic overnight and day nature visitors travelled for other reasons.

International nature visitors also chose to visit for holiday or pleasure (60%) and to visit friends and relatives (20%). International nature visitors were more likely to be travelling for business (9%) or education purposes (7%) than domestic visitors.

The more nature tourism activities undertaken, the more likely both domestic and international nature visitors were to travel for the purpose of holiday. The more nature activities visitors participate in, the less likely they are to travel for other reasons such as visiting friends and relatives.

Where do they stay?

Domestic overnight nature visitors preferred more affordable accommodation types such as friend's or relative's property (28% of nights) and caravan or camping accommodation (24% of nights).

International nature visitors stayed almost one third (32%) of their nights in a rented house/apartment or with friends or relatives (24% of nights).

How did they get information?

While international nature visitors used the internet (42%) and friends and relatives living in Australia (23%) as main information sources, they were also inclined to use travel agents (27%) and travel or guide books (20%) to obtain information.

DATA SOURCES

Tourism Research Australia National Visitor Survey (NVS) and International Visitor Survey (IVS) 2003-2007 (unpublished data)

KEY

- ^a Share of all domestic overnight visitors
- ^b Share of all domestic day visitors
- ^c Share of all international visitors

Note: Total percentage adds to more than 100 as visitors could have participated in more than one activity.

KEY FINDINGS

- There were **14.83 million domestic overnight, 14.55 million domestic day and 3.45 million international nature visitors in 2007.**
- **Domestic overnight nature visitors spent \$13.6 billion on their entire trip during 2007. This was on average around \$919 per person and \$154 per night.**
- **New Zealand and Japan are in the top three countries in terms of nature visitor numbers, but they have the lowest spend per visitor.**
- **Domestic overnight nature visitors preferred more affordable accommodation types such as friend's or relative's property (28% of nights) and caravan or camping accommodation (24% of nights).**
- **The more nature tourism activities undertaken, the more likely both domestic and international nature visitors were to travel for the purpose of holiday.**

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