

**NATURE
TOURISM
IN AUSTRALIA
2008**

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 2008.

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 2008:

- 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. Repeat participation in the same nature-based activity is not recorded in these surveys. Visitors may also participate in other tourism activities.

What are the recent visitor trends?

In 2008, there were 3.36 million international nature visitors to Australia. These visitors have been increasing at an average annual rate of 4% since 2003. Despite this, international nature visitors have been losing market share since peaking at 69% in 2005. Although market share has decreased, almost two thirds (65%) of international visitors still participate in nature activities. This is a higher

Table 1 Number of visitors who participated in nature activities, 2003–2008

	Total visitors						Average annual change
	2003	2004	2005	2006	2007	2008	
International							
Number of visitors (million)	2.79	3.02	3.46	3.43	3.45	3.36	4%
Share of total (%)	64%	63%	69%	67%	66%	65%	
Domestic overnight							
Number of visitors (million)	12.58	12.62	12.27	13.15	14.83	12.94	1%
Share of total (%)	17%	17%	18%	18%	20%	18%	
Domestic day							
Number of visitors (million)	12.67	11.01	12.57	12.44	14.55	12.37	0%
Share of total (%)	9%	8%	10%	9%	10%	9%	

market share than both the domestic day and overnight markets (market share of 9% and 18% respectively).

Domestic visitors comprise the majority of all nature visitors, split fairly evenly between day (12.37 million) and overnight visitors (12.94 million). Participation in nature activities has been increasing steadily in the domestic overnight market at an average annual rate of 1% since 2003. However, 2008 saw a decrease of 13% in these visitors, which corresponds with a 4% decline in the total domestic market.

Since 2003, there has been no real growth in domestic day nature visitor numbers. There was a spike in nature visitors in 2007, although in 2008 nature visitor numbers returned to previous figures. This corresponded with changes in the total domestic day market during this time. Market share for domestic day nature visitors has remained steady.

How much do they spend?

International nature visitors spent around \$20.2 billion dollars on trips to Australia in 2008. On average, nature visitors spent \$6,009 per trip compared to \$3,747 by other international visitors. This higher spend per trip is attributable to longer average length of stay by nature visitors, as visitors that did not participate in nature activities actually spent more per night (\$190 per night compared to \$153 per night).

Of the largest nature markets (see Table 3), visitors from Germany and China had the highest spend per trip (\$7,811 and \$6,696 respectively). Visitors from USA (\$253) and Japan (\$204) spent the most per night.

Table 2 Average stay and expenditure by international nature visitors, 2008

Country	Nature visitors %	Average stay Nights	Expenditure	
			Per visitor \$	Per night \$
United Kingdom	15	36	6,357	174
New Zealand	12	19	2,606	135
Japan	10	22	4,389	204
USA	9	25	6,286	253
China	7	48	6,696	137
Korea	5	24	6,517	221
Germany	4	52	7,811	150
Singapore	3	30	3,169	170
Other Europe	12	52	8,109	155
Other Asia	13	56	6,475	116
Other countries	3	48	6,898	144
Total	100	39	6,009	153

Domestic overnight nature visitors spent around \$12 billion on their trips in 2008. Domestic overnight visitors spent \$165 per night which was comparable to other visitors (\$164 per night). Nature visitors had a higher trip spend than other visitors due to a longer trip length (6 nights compared to 3 nights).

Domestic day nature visitors spent \$1.3 billion in 2008. On average, domestic day nature visitors spent \$107 per trip which was comparable to other day trip visitors (\$106).

Table 3 Average visitor expenditure by item, 2008

	International		Domestic overnight	
	Nature visitors	Other visitors	Nature visitors	Other visitors
Accommodation, food and beverages	1,726	1,623	561	347
Shopping	513	482	202	222
Domestic airfares	406	324	552	462
Other transport	1,962	1,568	198	134
Organised tours	507	271	319	229
Education	6,027	6,018	301	440
Entertainment	185	185	152	122
Other	1,548	831	341	178
Total average expenditure per visitor	6,009	3,747	925	567
Total average expenditure per night	153	190	165	164

What do they do?

Visiting National parks/Stages parks and bushwalking/rainforest walks were the most popular nature activities for domestic overnight (47% and 51% respectively) and domestic day visitors (42% and 39% respectively). Since 2003, visiting National parks/State parks and going whale or dolphin watching have shown the largest growth for domestic overnight visitors (average annual growth 4%), while scuba diving has seen the most significant decline (average annual decline of 18%).

Visiting National parks/Stages parks (66%), visiting wildlife parks, zoos and aquariums (58%) and visiting botanical or other public gardens (56%) were the top three nature activities for international nature visitors in 2008. Going whale or dolphin watching has seen the largest growth since 2003, increasing at an average annual rate of 8%.

Who are they?

Nearly half of international nature visitors (47%) travelled unaccompanied in 2008 and 28% travelled as an adult couple. International nature visitors were more likely to be aged between 20–29 years (30%) than other visitors (19%), who tended to be slightly older than nature visitors.

Visitors from the United Kingdom (15%), New Zealand (12%) and Japan (10%) represented the largest number of nature visitors during 2008. These were three of the top four largest international markets to visit Australia during 2008.

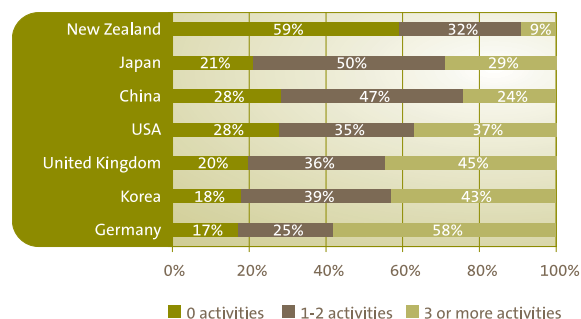
The majority of domestic overnight visitors travelled as an adult couple (31%) or as a family group (31%).

Table 4 Proportion of visitors by type of nature activity, 2008

Type of nature activities	International	Domestic overnight	Domestic day
	%		
Bushwalking/rainforest walks	37%	51%	39%
Visit National parks/State parks	66%	47%	42%
Visit botanical or other public gardens	56%	19%	25%
Visit wildlife parks/zoos/aquariums	58%	16%	13%
Whale or dolphin watching	13%	4%	2%
Snorkelling	18%	4%	1%
Scuba diving	8%	1%	0%
Total nature visitors (million)	3.36	12.94	12.37

Visitors of all ages participated in nature activities, with no real difference in age profile to those who did not.

Figure 1 Participation in nature activities by Tier 1 markets, 2008



How long do they stay?

Nature visitors tend to have longer lengths of stay than those not participating in nature activities. International nature visitors on average spent 39 nights in Australia, while other international visitors stayed 20 nights on average. Domestic nature visitors stayed 6 nights compared to 3 nights for those not participating in nature activities.

Why do they travel?

International nature visitors travelled for the purpose of holiday (58%) and to visit friends or relatives (21%). International nature visitors were more likely to be travelling for business (9%) or education (8%) than domestic visitors.

Domestic overnight and domestic day nature visitors travelled for the purpose of holiday (70% and 79% respectively) or to visit friends or relatives (25% and 16% respectively). Less than 10% of domestic overnight and domestic day nature visitors travelled for other reasons.

Where do they stay?

More than one third of international visitor nights were spent in rented accommodation (35%). Staying with friends or relatives accounted for 24% of international nights spent in Australia.

Domestic overnight nature visitors stayed at a friend or relative's property (27% of nights) or in hotel or motel accommodation (24%).

How did they get information?

The internet was the most widely used information source for both international and domestic nature visitors, with 46% of international visitors and 44% of domestic visitors choosing this source. Travel agents (26%) and friends or relatives living in Australia (23%) were also favoured by international visitors. Friends or relatives and previous visits were the other preferred information sources for domestic overnight nature visitors.

Where do they go?

International visitors to the Northern Territory (92%), Tasmania (87%) and South Australia (80%) were the most likely to be nature visitors. Victoria (69%) and New South Wales (70%) had the lowest proportion of nature visitors.

Domestic overnight visitors to the Northern Territory (37%) and Tasmania (30%) were the most likely to be nature visitors. Visitors to the ACT (14%) and South Australia (17%) were the least likely to participate in nature activities during their trip.

Data sources

Tourism Research Australia National Visitor Survey (NVS) and International Visitor Survey (IVS) 2000-2008 (unpublished data)

All figures refer to persons over the age of 15 years

Key findings

- There were 3.36 million international, 12.94 million domestic overnight, and 12.37 million domestic day nature visitors in 2008.
- International nature visitors spent \$20.2 billion, domestic overnight spent \$12 billion and domestic day visitors spent \$1.3 billion.
- The United Kingdom, New Zealand and Japan were the top three countries in terms of nature visitor numbers, but New Zealand and Japan had the lowest spend per visitor.
- International visitors from Germany and the United Kingdom were the most likely to participate in three or more nature activities.
- Visiting National parks/State parks was the most popular activity for international and domestic day visitors, while the majority of domestic overnight visitors went bushwalking.

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