

SNAPSHOTS 2009

NATURE TOURISM IN AUSTRALIA



Australian Government
Department of Resources, Energy and Tourism
Tourism Research Australia

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 2009.

Definition

A nature visitor is a domestic or international visitor who participated in at least one of the following nature activities while travelling in Australia in 2009:

- 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

Repeat participation in the same nature-based activity is not recorded in this data. Visitors may also participate in other activities.

Other visitors are defined as domestic or international visitors who do not participate in nature activities while in Australia.

What are the recent visitor trends?

In 2009, there were 3.3 million international nature visitors to Australia. These visitors have been increasing at an average annual rate of 3% since 2003. Despite this, international nature visitors

Table 1 Number of visitors who participated in nature activities

	Total visitors							Average annual change
	2003	2004	2005	2006	2007	2008	2009	
International								
Number of visitors (million)	2.79	3.02	3.46	3.43	3.45	3.36	3.31	3%
Share of total (%)	64%	63%	69%	67%	66%	65%	64%	
Domestic overnight								
Number of visitors (million)	12.59	12.62	12.27	13.15	14.83	12.94	12.46	0%
Share of total (%)	17%	17%	18%	18%	20%	18%	19%	
Domestic day								
Number of visitors (million)	12.65	11.01	12.57	12.44	14.55	12.37	12.55	0%
Share of total (%)	9%	8%	10%	9%	10%	9%	9%	

have been losing market share since peaking at 69% in 2005. Although market share has decreased, almost two thirds (64%) of international visitors still participate in nature activities. This is a higher market share than both the domestic day and overnight markets (market share of 9% and 19% respectively).

Domestic visitors comprise the majority of all nature visitors, split fairly evenly between day (12.55 million) and overnight visitors (12.46 million). Participation in nature activities has remained flat in both the domestic overnight and day markets.

How much did they spend?

International nature visitors spent around \$19.5 billion on trips to Australia in 2009. On average, nature visitors spent \$5,898 per trip compared to \$3,614 by other international visitors. This higher spend per trip is attributable to a longer average length of stay by nature visitors (42 nights compared to 21 nights), as visitors that did not participate in nature activities spent more per night (\$175 per night compared to \$141 per night).

Of the largest nature markets (see Table 2), visitors from China and Korea had the highest spend per trip (\$7,749 and \$7,407 respectively). Visitors from USA (\$215) and Japan (\$204) spent the most per night.

Domestic overnight nature visitors spent \$12.6 billion on their trips in 2009. Domestic overnight visitors spent \$178 per night which was comparable to other visitors (\$160 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 \$1.2 billion in 2009. On average, domestic day nature visitors spent \$99 per trip which was comparable to other day visitors (\$102).

What did they do?

Bushwalking/rainforest walks and *visiting national parks/state parks* were the most popular nature activities for domestic overnight (48% and 47% respectively) and domestic day visitors (43% and 36% respectively). Since 2003, *going whale or dolphin watching* has shown the largest growth for domestic overnight visitors (average annual growth 5%) while *scuba diving* has seen the most significant decline (average annual decline of 13%).

Table 2 Average visitor expenditure by item, 2009

	International		Domestic overnight	
	Nature visitors	Other visitors	Nature visitors	Other visitors
Accommodation, food and beverages	1,807	1,043	598	343
Shopping	544	448	228	224
Domestic airfares	389	326	558	450
Other transport	1,793	1,389	196	123
Organised tours	531	274	355	354
Education	9,059	9,839	345	509
Entertainment	200	197	144	125
Other	1,468	736	451	215
Total average expenditure per visitor	5,898	3,614	1,008	556
Total average expenditure per night	141	175	178	160

Visiting national parks/state 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 2009. *Going whale or dolphin watching* has seen the largest growth since 2003, increasing at an average annual rate of 5%.

Who were they?

Over half of international nature visitors (52%) travelled *unaccompanied* in 2009 and 26% travelled *as an adult couple*. International nature visitors tended to be younger than other visitors, with nearly a third (31%) aged between 20–29 years.

Visitors from the United Kingdom (15%), New Zealand (12%) and USA (10%) represented the largest number of nature visitors during 2009. These were also the three largest international markets to visit Australia during 2009.

The majority of domestic overnight visitors travelled in a *family group* (32%) or *as an adult couple* (31%). Domestic visitors of all ages participated in nature activities, with no real difference in age profile to those who did not participate in nature activities.

Why did they travel?

International nature visitors travelled to Australia for the purpose of *holiday* (57%) and to *visit friends or relatives* (23%). International nature visitors were less likely to be travelling for *education* (9%) or *business* (7%).

Domestic overnight and domestic day nature visitors travelled for the purpose of *holiday* (71% and 78% respectively) or to *visit friends or relatives* (25% and 15% respectively).

Where did they stay?

More than one third of international nature visitor nights were spent in *rented accommodation* (37%). *Staying with friends or relatives* accounted for 24% of international nights spent in Australia.

Domestic overnight nature visitors stayed at a *friend's or relative's property* (28% of nights), *caravan or camping* (26% of nights) or in *hotel or motel accommodation* (24% of nights).

How did they get information?

The *internet* was the most widely used information source for both International and domestic nature visitors, with 50% of international visitors and 48% of domestic overnight visitors choosing this source. *Travel agents* (28%) and *friends or relatives living in Australia* (26%) were also favoured by international visitors. *Previous visits* and *friends or relatives* were the other preferred information sources for domestic overnight nature visitors.

Table 4 Proportion of visitors by type of nature activity, 2009

Type of nature activities	International	Domestic overnight	Domestic day %
Bushwalking/rainforest walks	38	48	36
Visit national parks/state parks	66	47	43
Visit botanical or other public gardens	56	19	24
Visit wildlife parks/zoos/aquariums	57	17	14
Whale or dolphin watching	12	4	2
Snorkelling	17	5	2
Scuba diving	8	1	1
Total nature visitors (million)	3.30	12.46	12.55

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Where did they go?

International visitors to the Northern Territory (91%), Tasmania (85%) and South Australia (81%) were most likely to be nature visitors. Victoria (68%) and New South Wales (70%) had the lowest proportion of nature visitors. International nature visitors (23%) were more likely to visit regional areas of Australia than other visitors (17%).

Domestic overnight visitors to the Northern Territory (41%) and Tasmania (31%) were the most likely to be nature visitors. Visitors to Victoria (16%) and the Australian Capital Territory (17%) were the least likely to participate in nature activities during their trip.

Destination Visitor Survey

Additional information is collected on domestic and international visitors through the Visitor Profile and Satisfaction (VPS) program. Since 2005, 67 regional tourism destinations have participated in the VPS program. The profiling, expectation and satisfaction information collected from those destinations has been combined into one database. The following analysis is based on leisure visitors*.

From the VPS database, two thirds of visitors expected to have nature based experiences in the destination they were visiting. These visitors can be split into two groups:

1. Purposeful nature visitors: Visitors who were expecting a nature experience and also gave it as a reason for choosing the destination – about 26% of visitors
2. Incidental nature visitors: Visitors who were expecting a nature experience, but didn't give it as a reason for choosing the destination – about 74% of visitors

Table 5 shows a number of key differences between these two groups in terms of activity participation. The biggest difference was with *visiting national and/or state parks* (67% compared with 30) and *bushwalking/rainforest walking* (71% compared with 30%) with purposeful nature visitors more likely to undertake these activities.

Purposeful nature visitors were also more likely to undertake a range of other activities ranging from cultural type activities through to general sightseeing.

Table 5 Activity participation by purposeful and incidental nature visitors

	Proportion of purposeful nature visitors (%)	Proportion of incidental nature visitors (%)
Nature based activities		
Visit national and state parks	67	30
Go bushwalking, rainforest walking	71	30
Visit wildlife parks/zoos/aquariums	24	17
Visit botanical/public gardens	24	21
Other activities		
Going to the beach	73	57
Visit museums or galleries	35	25
Visit history/heritage sites	38	29
Visit wineries/cellar doors	25	22
Eating out at hotels/restaurants	68	69
General sightseeing	84	74
Shopping	57	53

Data sources

Tourism Research Australia National Visitor Survey (NVS) and International Visitor Survey (IVS), 2000–2009 (unpublished data).
Tourism Research Australia Destination Visitor Survey (DVS) (unpublished data).

All figures refer to persons over the age of 15 years.

Notes

*Travelling for the purposes of holiday and leisure

Key findings

- There were 3.3 million international, 12.46 million domestic overnight, and 12.55 million domestic day nature visitors in 2009.
- International nature visitors spent \$19.5 billion, domestic overnight visitors spent \$12.6 billion and domestic day visitors spent \$1.2 billion.
- The United Kingdom, New Zealand and the United States were the top three countries in terms of nature visitor numbers.
- *Visiting national parks/state parks* was the most popular activity for international and domestic day visitors, while more of domestic overnight visitors chose *bushwalking*.

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