

NATURE-BASED TOURISM IN AUSTRALIA

MARCH 2014



Nature-based tourism in Australia – Visitors

In 2012-13, nature-based activities were undertaken by:

- **3.7 million** international visitors
- **15.2 million** domestic overnight visitors
- **15.2 million** domestic day visitors

This represented:

- **63%** of all international visitors
- **20%** of all domestic overnight visitors
- **9%** of all domestic day visitors

TTF analysis of Tourism Research Australia's *International* and *National Visitor Surveys*.
All figures presented relate to visitors aged 15 years and above.

Nature-based tourism in Australia – Trends

Nature-based tourism has outperformed the overall tourism market on all fronts in 2012-13.

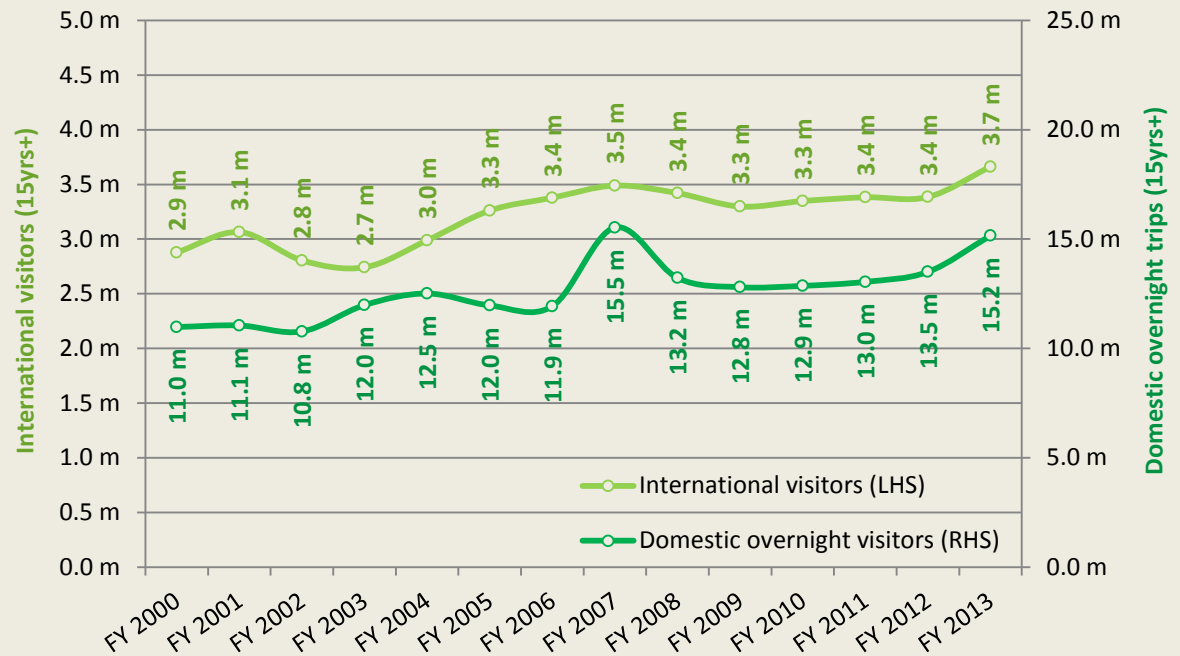
NATURE-BASED TOURISM

- International **+8.2%**
- Domestic overnight **+12.3%**
- Domestic day **+8.6%**

OVERALL TOURISM

- International **+5.1%**
- Domestic overnight **+2.6%**
- Domestic day **-0.6%**

NATURE-BASED TOURISM IN AUSTRALIA



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Nature-based tourism in Australia – Activities

INTERNATIONAL VISITORS

Growth in nature-based tourism over the past year has been led in volume terms by visits to national parks, botanical gardens, wildlife parks and whale/dolphin watching at sea. In percentage terms, the greatest gains have occurred in whale/dolphin watching (+25.0%), snorkelling (+10.7%) and visits to botanical gardens (+8.3%) and national parks (+7.8%).

DOMESTIC OVERNIGHT VISITORS

Growth in this segment over the past year has been led in volume terms by visits to national parks, bushwalking and visits to botanical gardens.

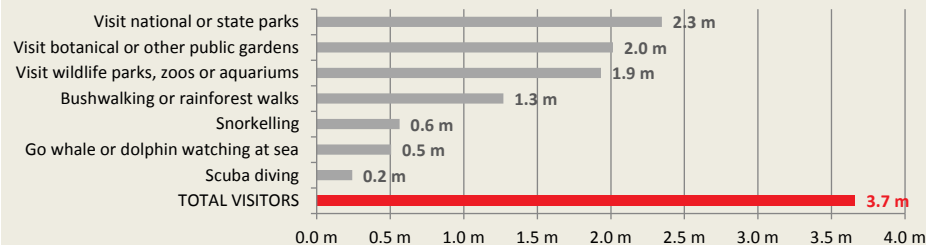
In percentage terms, the greatest gains have occurred in scuba diving (+89.7%), whale/dolphin watching (+36.4%), and visits to national parks (+14.2%) and botanical gardens (+13.5%).

DOMESTIC DAY VISITORS

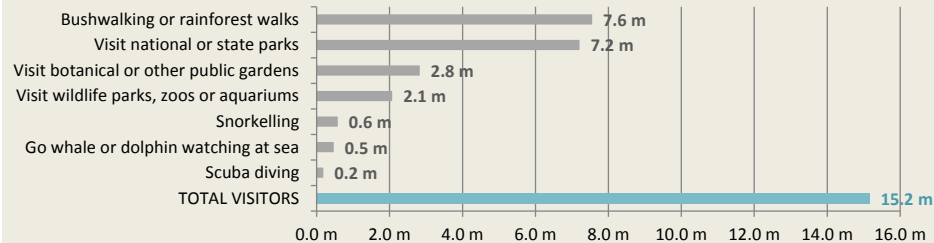
Growth in this segment over the past year has been led in volume terms by visits to national parks, wildlife parks and botanical gardens.

In percentage terms, the greatest gains have occurred in visits to wildlife parks (+24.5%), national parks (+7.6%) and botanical gardens (+7.2%).

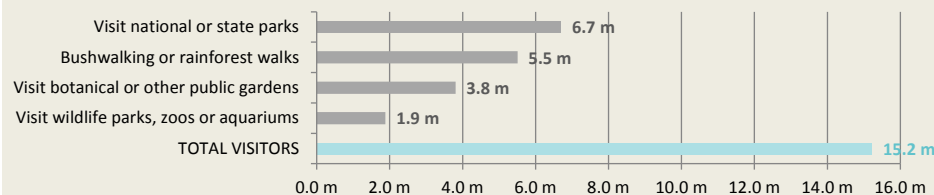
INTERNATIONAL VISITORS & NATURE-BASED ACTIVITIES, FY 2013



DOMESTIC OVERNIGHT VISITORS & NATURE-BASED ACTIVITIES, FY 2013



DOMESTIC DAY VISITORS & NATURE-BASED ACTIVITIES, FY 2013



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Nature-based tourism in Australia – Yield

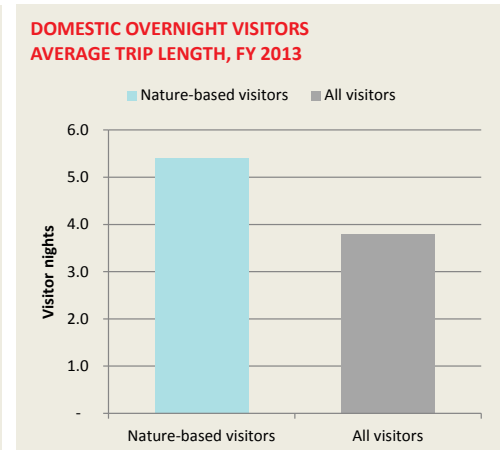
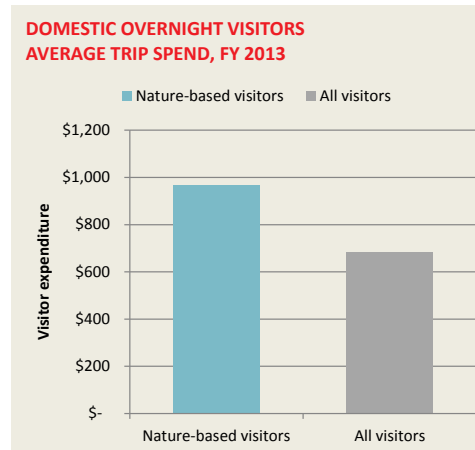
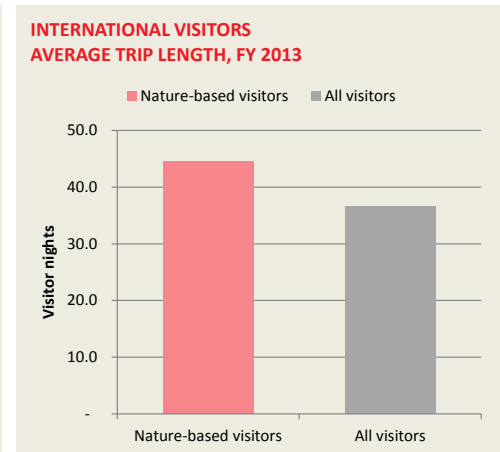
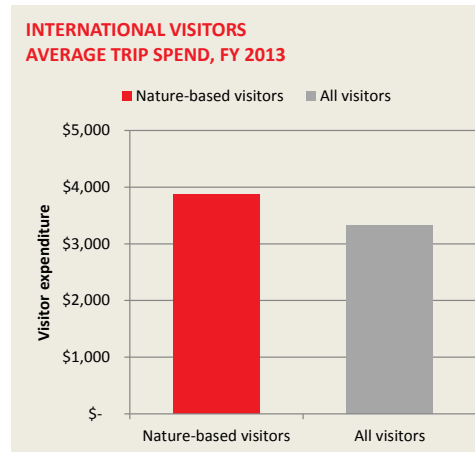
Nature-based visitors generate higher yield on average, spending more and staying longer.

INTERNATIONAL VISITORS

- Spend 17% more (\$3,870 vs \$3,320)
- Stay 22% longer (44.5 vs 36.5 nights)

DOMESTIC OVERNIGHT VISITORS

- Spend 42% more (\$970 vs \$680)
- Stay 42% longer (5.4 vs 3.8 nights)



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Nature-based tourism in Australia – Destinations

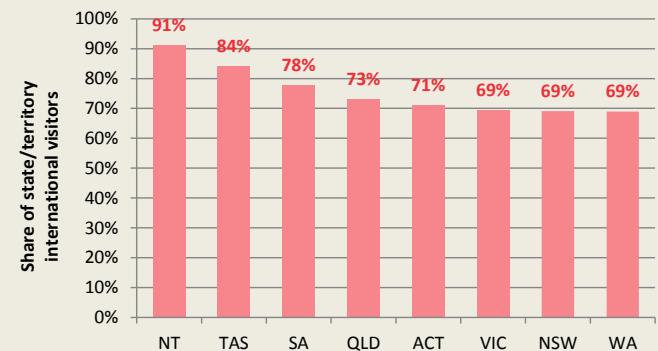
The larger states naturally dominate in volume terms for share of all nature-based visitors, with NSW, Victoria and Queensland leading the way.

However, an examination of the propensity for nature-based activities within visitors to each state and territory reveal the greatest propensity among both international and domestic overnight visitors to the NT and Tasmania, reinforcing both destinations' strong natural heritage brands.

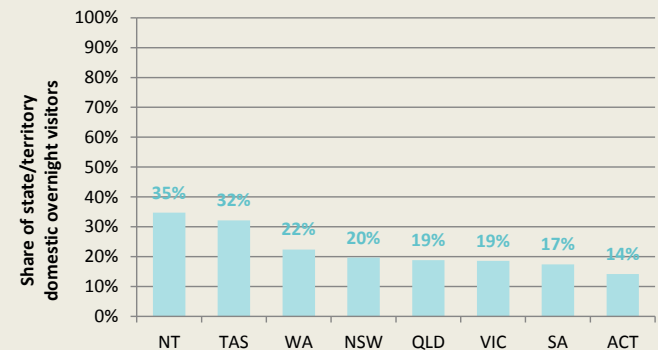
South Australia and Queensland also enjoy particularly high percentages of international visitors who participated in nature-based activities, while in the domestic overnight market, the same is true for WA, NSW, Queensland and Victoria.

TTF analysis of Tourism Research Australia's *International and National Visitor Surveys*. All figures presented relate to visitors aged 15 years and above.

**NATURE-BASED INTERNATIONAL VISITORS
AS SHARE OF STATE/TERRITORY MARKET, FY 2013**



**NATURE-BASED DOMESTIC OVERNIGHT VISITORS
AS SHARE OF STATE/TERRITORY MARKET, FY 2013**

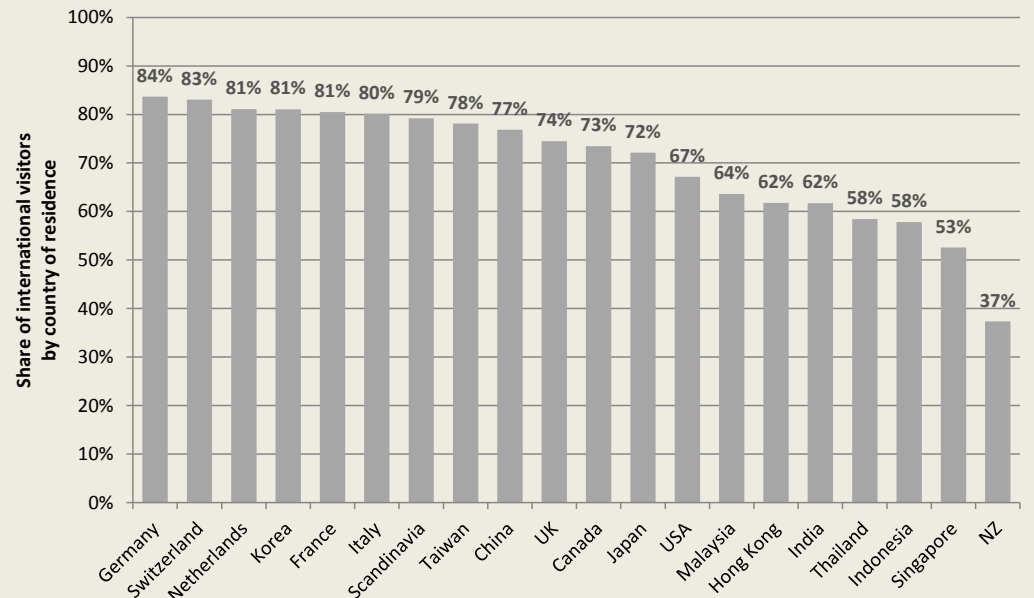


Nature-based tourism in Australia – Markets

While 63% of all international visitors participate in nature-based activities, 14 of Australia's top 20 markets demonstrate a greater propensity for nature-based tourism – led by the traditional markets of Europe, North America, Korea, Taiwan and Japan.

Though emerging Asian markets still lag traditional markets on propensity, 77% of visitors from China now participate in nature-based activities, exhibiting stronger preferences for botanical gardens (63% vs 55% overall) and whale/dolphin watching (19% vs 14%) but weaker preferences for wildlife parks (43% vs 53%), snorkelling (10% vs 15%) and bushwalking (31% vs 35%).

**NATURE-BASED INTERNATIONAL VISITORS
AS SHARE OF COUNTRY MARKET, FY 2013**



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Nature-based tourism in Australia – Market trends

Since the turn of the century, the overall propensity for international visitors to participate in nature-based tourism has declined, having experienced two troughs. The metric has just begun to recover over the past year, with all but three of Australia's top 20 markets maintaining or increasing propensity.

Over the 13 years to June 2013, The proportion of visitors who participate in nature-based activities has fallen in particular for the following markets:

- New Zealand (-10pt, 48% to 37%)
- Thailand (-9pt, 67% to 58%)
- USA (-8pt, 75% to 67%)
- Singapore (-7pt, 60% to 53%)
- Taiwan (-6pt, 84% to 78%)

However, the propensity for nature-based tourism has grown over the same period in other markets, in particular:

- China (+16pt, 61% to 77%)
- France (+12pt, 69% to 81%)
- Indonesia (+11pt, 47% to 58%)
- Korea (+11pt, 70% to 81%)
- Switzerland (+8pt, 75% to 83%)

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While the propensity for nature-based tourism has declined in some markets over the longer time, there are opportunities to capture the growing interest from emerging markets and a recent boost in the overall share of international visitors participating in nature-based activities.

**NATURE-BASED VISITORS
AS SHARE OF COUNTRY MARKET**

