

Nature Based Activities

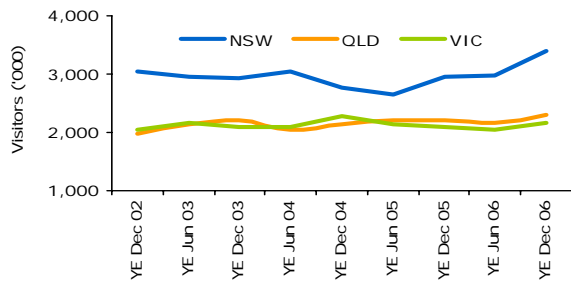
Year ended December 2006

Domestic Market – QLD, Australian states

Source: National Visitor Survey, Tourism Research Australia.

The following information relates to tourists who engaged in the activities of visiting national parks or state parks; bushwalking or rainforest walks; wildlife watching; and/or water based activities (visit the reef, scuba diving & snorkelling) during their visit to a particular state or region.

Nature Based Visitors to States - Domestic



	Nights ('000)	Average length of stay (nights)	AAGR YE Dec 02-YE Dec 06
QLD	13,810	6.0	2%
NSW	14,356	4.2	2.8%
VIC	7,672	3.5	1.6%
Australia	10,332	4.8	2.9%

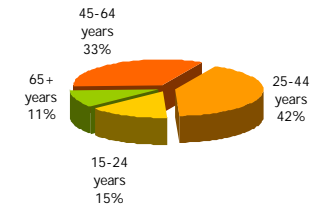
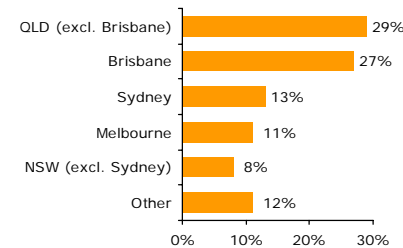
AAGR – average annual growth rate

- 14% of all domestic visitors to Australia participated in nature based activities during their trip (10.3 million visitors), spending 49 million nights. 22% of these visitors went to QLD (2.3 million visitors), 33% went to NSW, and Victoria's share of the total market was 21%.
- The number of domestic nature based visitors to QLD increased over the last four years (average annual growth rate of 4%), while NSW and Victoria saw 2.8% and 1.6% growth.

Activity	Visitors to QLD ('000)	AAGR YE Dec 02-YE Dec 06	Visitors to NSW ('000)	AAGR YE Dec 02-YE Dec 06	Visitors to VIC ('000)	AAGR YE Dec 02-YE Dec 06	Visitors to Australia ('000)	AAGR YE Dec 02-YE Dec 06
Bushwalking/rainforest walks	1,380	2.1%	2,279	-1.2%	1,491	0.2%	6,750	0.2%
Visit national/state parks	1,320	7.0%	1,793	14.6%	1,160	1.5%	5,832	8.6%
Water activities	504	13.0%	205	13.6%	60	2.7%	967	13.7%
Wildlife watching	156	2.4%	222	11.0%	33	-13.5%	564	5%
All nature based activities	2,300	3.8%	3,391	2.8%	2,172	1.6%	10,332	2.9%
Total visitors to state	17,161	1.3%	24,851	-2.4%	17,424	-0.9%	73,564	-0.6%

AAGR – average annual growth rate

Where are nature based visitors to QLD from? How old are they?



- The 65 years or over age group has grown significantly over the last four years.

How much do they earn?

The annual household income is distributed between domestic nature based travellers as follows:

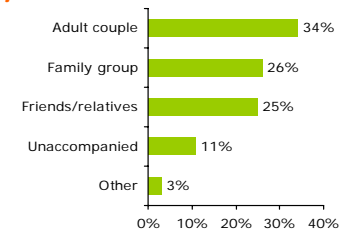
- \$78,000 to \$129,999 - 28%
- \$130,000 or more - 16%
- \$36,400 to \$77,999 - 25%
- \$1 to \$36,400 - 14%

How long did nature based visitors stay in QLD?

- 37% spent 1-3 nights; 39% spent 4-7 nights; 18% spent 8-14 nights; and 7% spent 15 nights or more.
- There was growth (up 10.3%) in the number of nature based visitors staying 4-7 nights (comparing 2002 and 2006).

Who do they travel with?

- Fewer nature based visitors to QLD travelled alone, compared with all domestic visitors to the state.
- The number of adult couples has decreased since the year ended December 2005 (from 36%).



What type of accommodation and transport do they use?

- 26% of the domestic nature based visitor nights spent in QLD were spent in a hotel, motel, resort or motor inn. A further 24% stayed with friends or relatives.
- Visitors mainly travelled to QLD by private/rented vehicle (58%), while 36% travelled by air.

Nature Based Activities

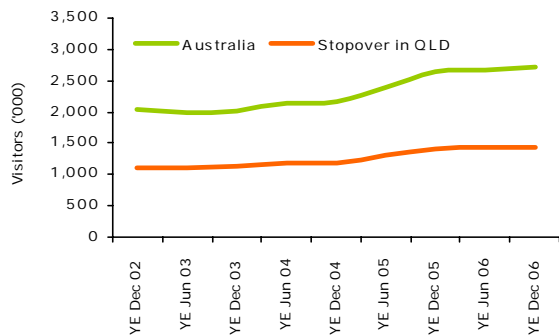
Year ended December 2006

International Market – QLD and Australia

Source: International Visitor Survey, Tourism Research Australia.

The following information relates to tourists who engaged in the activities of visiting national parks or state parks; bushwalking or rainforest walks; wildlife watching; and/or water based activities (scuba diving and snorkelling) during their trip to Australia, **not necessarily in a particular state or region.**

Nature Based Visitors to Australia - Inbound



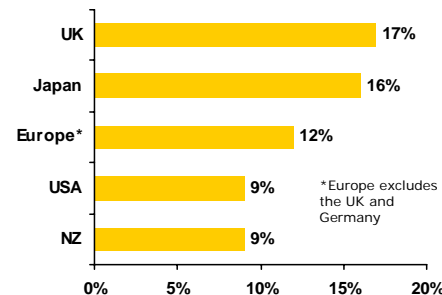
- 2.7 million inbound tourists participated in nature based activities while in Australia (54% of all international visitors to the country). Of these, 53% (1.4 million visitors) made a stopover in QLD, and 61% (1.7 million visitors) made a stopover in NSW.
- 103 million visitor nights were spent in Australia by international tourists who participated in nature based activities. 24% of these were in QLD (24.2 million nights), and their average length of stay of was 16.8 nights.

- Over the last four years, the number of international nature based tourists to Australia has increased by 7.5% annually on average, while the number of visitor nights spent in the country by this market increased annually by an average 9.2%.
- From 2002, there has been significant growth in the number of international tourists participating in water activities and wildlife watching.

	Australia ('000)	Activity share of all int'l nature based visitors	AAGR YE Dec 02-YE Dec 06	Made Stopover in QLD ('000)	Activity share of all int'l nature based visitors	AAGR YE Dec 02-YE Dec 06
Bushwalking/ rainforest walk	1,294	48%	7.7%	825	38%	6.6%
Visit national/state parks	2,378	88%	6.5%	1,237	57%	5.6%
Water activities	740	27%	31.6%	649	30%	29.4%
Wildlife watching	495	18%	15.5%	262	12%	11.5%
All Nature Based Visitors	2,715	-	7.5%	1,422	-	6.8%
All Visitors	5,064	-	3.4%	2,181	-	3.4%

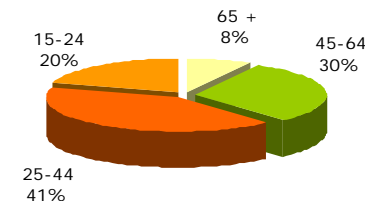
AAGR – average annual growth rate

Where were nature based visitors to Australia from?



- Excluding Singapore, there has been growth in the top nature based markets between 2002 and 2006.
- In QLD, Japanese nature based visitors made up 22% of the market, while those from the UK made up 17% of QLD nature-based visitors.

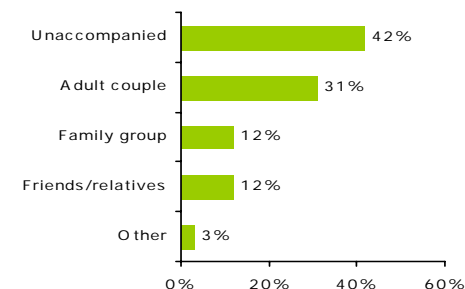
How old are they?



- There is little difference in the age of nature based visitors compared with all international visitors.
- The strongest growth in the last four years lies with the group aged 65 years and over.

Who do they travel with?

- Compared with 2002, in the last year a greater proportion of nature based visitors were travelling in a family group.
- 35% of international nature based visitors who made a stopover in QLD were travelling as an adult couple.



Nature Based Activities

Year ended December 2006

International Market - continued – QLD and Australia

Source: International Visitor Survey, Tourism Research Australia.

What type of transport do they use?

- Between stopovers in Australia, nature based visitors mainly travelled by air (68%), while 35% travelled by private/rented vehicle.
- 66% of the nature based visitors who stopped off in QLD travelled between stopovers by air transport, with 29% travelling by private/rented vehicle.
- Air transport was more popular among nature based visitors in 2006 than in 2002.

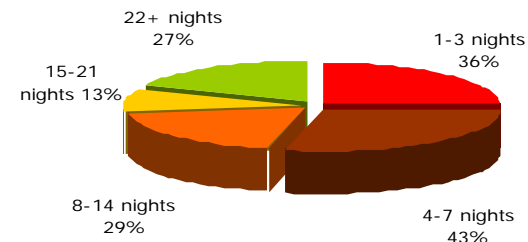
How much did visitors spend in Australia?

- An average of \$86 per day during their visit (slightly less per day than all international visitors to Australia).
- Overall, approximately \$3,262 was spent in Australia by the average international nature based visitor (excluding package tours and prepaid international airfares). This was more than the average expenditure of all international visitors to Australia (\$2,757), and may be related to the average length of stay of nature based visitors (38 nights versus 31 nights by all international visitors).

What type of accommodation did they stay in?

- 31% of the nature based visitor nights spent in Australia were in a rented house, apartment, unit or flat and a further 24% were spent in the home of a friend or relative.
- Of the nature based visitors to Australia who made a stopover in QLD, 20% of all visitor nights were spent in a backpacker/hostel (4.8 million nights).
- Nature based visitors to Australia were more likely to stay in a guesthouse or bed and breakfast accommodation in 2006 than in 2002.

How long did nature based visitors stay in Australia?



- Nature based visitors are staying in Australia longer compared with four years ago (up 2.2 nights).
- In 2006, 57% of all Japanese nature based visitors stayed 1 to 3 nights, while almost half (47%) of all UK nature based visitors spent 4 to 7 nights in Australia.
- 30% of nature based visitors who made a nature based stopover in QLD spent 4 to 7 nights doing so, while 26% stayed 1 to 3 nights.

Expenditure item	Average Expenditure per International nature based visitor (\$A)	Average Expenditure per International visitor (\$A)
Food, drink and accommodation	\$1,441	\$1,200
Shopping	\$448	\$399
Transport (excluding airfares) *	\$401	\$315
Organised tours	\$212	\$125
Education	\$432	\$438
Domestic and international airfares (bought in Australia)	\$131	\$103

Nature Based Activities

Year ended December 2006



State	Visitors ('000)	Visitor Nights ('000)	Market Share Visitors	Market Share Visitor Nights	Growth YE Dec 05 - YE Dec 06 Visitors	Growth YE Dec 05 -YE Dec 06 Visitor Nights
NSW	1,668,062	37,092,370	61%	36%	6.1%	21.3%
QLD	1,442,077	24,275,518	53%	24%	1.6%	16.2%
VIC	838,742	19,235,580	31%	19%	10.4%	22.5%
WA	390,040	10,978,412	14%	11%	-2.4%	0.5%
NT	341,244	2,656,167	13%	3%	5.6%	14.8%
SA	260,093	5,023,528	10%	5%	2.9%	5.8%
TAS	120,120	2,496,852	4%	2%	11.0%	18.4%
ACT	105,933	1,295,662	4%	1%	-1.9%	17.4%
Total	2,714,521	103,055,658	-	-	2.8%	16.6%

- At the year ending December 2006, Queensland was the second most popular destination in Australia for international visitors partaking in nature based activities.
- Compared with Victoria (ranked third), over half a million more visitors came to Queensland for nature based activities.
- Over the last year, visitor numbers to Queensland for nature based activities grew 1.6% (an increase of 22,400 visitors). Visitor nights had stronger growth, with a 16.2% increase in the last year (3,387,000 more nights).

Data Sources:

The **National Visitor Survey (NVS)** is conducted by Newton Wayman Chong Research on behalf of TRA. Approximately 80,000 Australian residents aged 14 and over comprise the annual national sample.

The **International Visitor Survey (IVS)** is conducted by Newton Wayman Chong Research on behalf of TRA. IVS information is collected by personal interviews with short-term international visitors to Australia in the departure lounges at eight Australian airports prior to departure. The IVS is weighted to total figures supplied by the Australian Bureau of Statistics' Overseas Arrivals and Departures data and does not include persons aged under 15 years.

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