

Adventure Market Snapshot

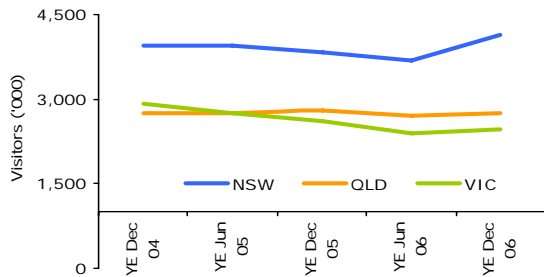
Year ended December 2006

Domestic Adventure Market – QLD and Australia

Source: National Visitor Survey, Tourism Research Australia.

The following information relates to tourists who engaged in the activities of bushwalking and/or rainforest walks; scuba diving; snorkelling; surfing; water activities or sports (eg. sailing, windsurfing, kayaking etc); and/or other outdoor activities (eg. horse-riding, rock climbing, bungee jumping, four-wheel driving etc) during their visit to a particular state or region.

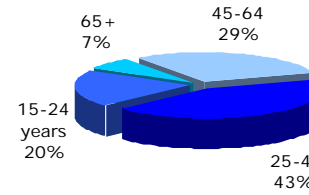
Adventure Visitors to States - Domestic



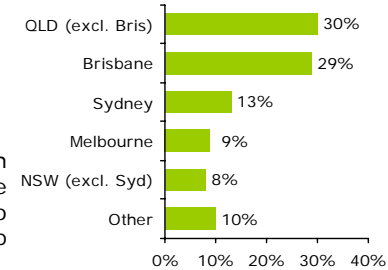
	Nights ('000)	Average length of stay (nights)	AAGR YE Dec 04-YE Dec 06
QLD	14,883	5.4	5.7%
NSW	17,558	4.3	4.4%
VIC	8,941	3.6	-6.9%
Australia	54,807	4.6	0.4%

AAGR – average annual growth rate

How old are they (QLD)?



Where are adventure visitors to QLD from?

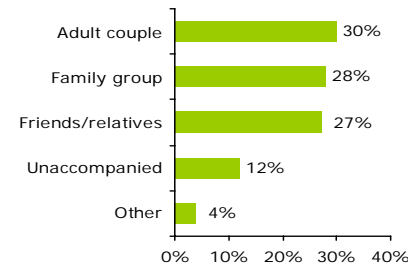


- There has been good growth over the last two years in the number of adventure visitors to QLD aged 65 and over (up 14.6%).

Why are they travelling?

- 71% of the domestic adventure visitors travelled to QLD for holiday.
- The holiday market declined by 1.8% from 2004.

Who do they travel with?



What type of accommodation and transport do they use?

- 26% of the domestic adventure visitor nights spent in QLD were spent in a hotel, motel, resort or motor inn, with a further 24% spent at a friend or relative's home.
- Visitors mainly travelled to QLD by private/rented vehicle (62%), while 31% travelled by air.
- More domestic adventure visitors to QLD travelled in a family group in 2006 compared with 2004 (up 9.3%).

How much do they earn?

- Domestic adventure visitors to QLD have an annual household income between \$78,000 to \$129,999 (28%) and \$36,400 and \$77,999 (25%). They are higher earners on average than all visitors to QLD.

- 16% of all domestic visitors to Australia participated in adventure activities during their trip (12.0 million visitors), spending 54.8 million nights. 23% of these visitors went to QLD (2.8 million visitors), and 34% went to NSW, with VIC's share of the total market 21%.
- The number of domestic adventure visitors to NSW and QLD increased over the last two years (average annual growth rates of 2.4% and 0.3% respectively). VIC experienced a decline of 8.3% in the number of domestic adventure visitors over this period.

Activity	Visitors to QLD ('000)	AAGR YE Dec 04-YE Dec 06	Visitors to NSW ('000)	AAGR YE Dec 04-YE Dec 06	Visitors to VIC ('000)	AAGR YE Dec 04-YE Dec 06	Visitors to Australia ('000)	AAGR YE Dec 04-YE Dec 06
Bushwalking/ rainforest walks	1,380 (50%)	3.6%	2,279 (55%)	9.5%	1,491 (61%)	-6.3%	6,750	1.4%
Water activities or sports	681 (25%)	5.4%	967 (23%)	3.8%	470 (19%)	-2.9%	2,754	4.2%
Other outdoor activities	535 (19%)	-21.0%	693 (17%)	-23.5%	469 (19%)	-26.8%	2,245	-22.1%
Surfing	408 (15%)	8.7%	704 (17%)	10.6%	298 (12%)	3.5%	1,665	8.7%
Snorkelling	393 (14%)	9.5%	159 (4%)	18.1%	28 (1%)	n/a	738	12.4%
Scuba diving	95 (3%)	3.9%	40 (1%)	17.4%	19 (1%)	n/a	185	1.4%
All adventure activities	2,758	0.3%	4,131	2.4%	2,464	-8.3%	11,996	-1.7%

Adventure Market Snapshot

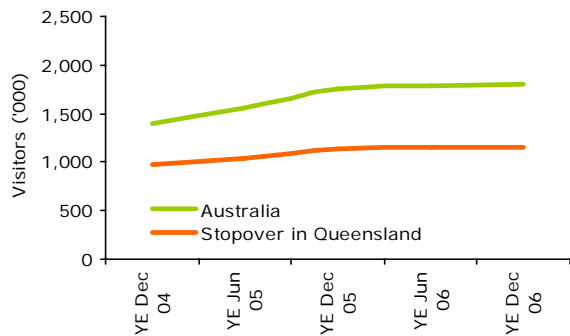
Year ended December 2006

International Adventure Market – QLD and Australia

Source: International Visitor Survey, Tourism Research Australia.

The following information relates to tourists who engaged in the activities of bushwalking and/or rainforest walks; scuba diving; snorkelling; surfing; water activities or sports (eg. sailing, windsurfing, kayaking etc); and/or other outdoor activities during their trip to Australia, **not necessarily in a particular state or region.**

Adventure Visitors to Australia

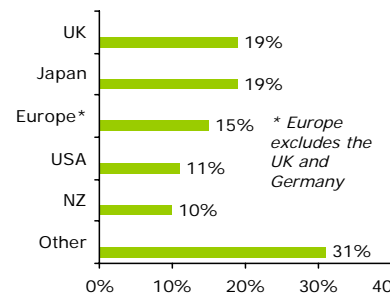


- 1.8 million inbound tourists participated in adventure activities while in Australia (36% of all international visitors to the country). Of these, 64% (1.2 million visitors) made a stopover in QLD, and 61% (1.1 million visitors) made a stopover in NSW.
- 76.5 million visitor nights were spent in Australia by international tourists who participated in adventure activities (28% of these were in QLD, almost 21.6 million nights) – average length of stay of 18.6 nights.

- Over the last two years, the number of international adventure tourists to Australia has increased by 13.7% annually on average, while the number of visitor nights spent in the country by this market increased annually by an average 18.0%.
- From 2004, there has been a large increase in the number of international tourists undertaking surfing while in the country (up 19.3%).

	Australia ('000)	Activity share of all int'l adventure visitors	AAGR YE Dec 04-YE Dec 06	Made Stopover in QLD ('000)	Activity share of all int'l adventure visitors	AAGR YE Dec 04-YE Dec 06
Bushwalking/ rainforest walks	1,294	72%	12.0%	825	71%	8.8%
Snorkelling	667	37%	8.7%	589	51%	7.0%
Other outdoor activities	343	19%	n/a	234	20%	n/a
Water activities or sports	313	17%	11.9%	215	19%	6.5%
Surfing	268	15%	19.3%	183	16%	22.7%
Scuba diving	254	14%	1.2%	225	19%	-1.4%
All adventure activities	1,807	-	13.7%	1,159	-	9.3%

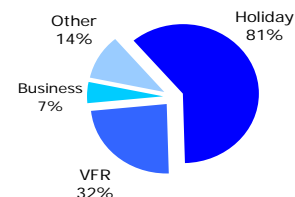
Where were adventure visitors to Australia from?



- There has been growth in the top adventure markets between 2004 and 2006.
- The average length of stay of adventure visitors to Australia increased from 39.3 nights in 2004 to 42.3 nights in 2006 (up 3.0 nights).

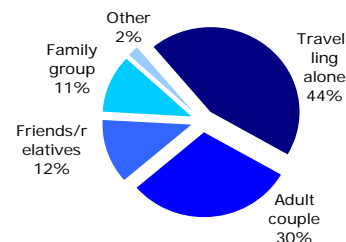
Why are they travelling?

- 81% of the adventure visitors to Australia visited for holiday. Thirty-two percent (32%) stated that their main reason for travelling to Australia was to visit friends and relatives
- The holiday market increased by 12.1% from 2004 while the VFR market also increased by 11.3%.

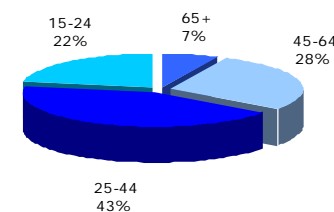


Who do they travel with?

- Unaccompanied travellers and adult couples made up 44% and 30% of the total adventure visitors to Australia.
- A greater number were unaccompanied travellers in 2006 than in 2004.



How old are they?



- There is no real difference in the age of adventure visitors as compared with all international visitors.
- The 65 and over market grew the most in the last two years (up 22.0%).

What type of accommodation and transport do they use?

- 30% of the international adventure visitor nights spent in Australia were spent in a rented house, apartment, unit or flat, with a further 21% spent at a friend or relative's home.
- Visitors mainly travelled to Australia by air (53%), while 50% travelled by self-drive.

Adventure Market Snapshot

Year ended December 2006



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 also 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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