

Wildlife Tourism

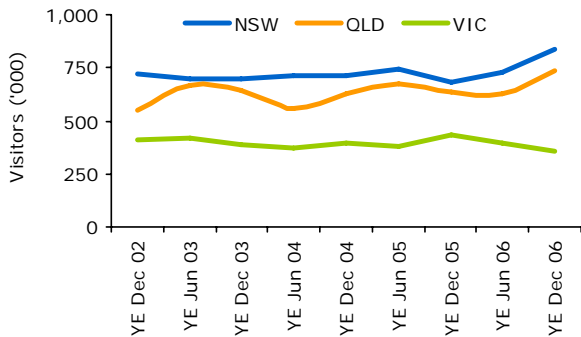
Year ended December 2006

Domestic Market – QLD, Australian states

Source: National Visitor Survey, Tourism Research Australia.

The following information relates to tourists who engaged in the activities of “whale or dolphin watching” or “visiting wildlife parks, zoos, aquariums” during their visit.

Wildlife Tourism Visitors to States - Domestic



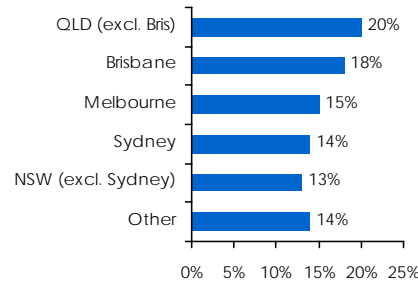
- 2.5 million Australians participated in overnight wildlife tourism activities while on their trip.
- 33% of these went to NSW, 29% visited QLD and VIC claimed 14% of the visitors.

- 14.5 million visitor nights were spent in Australia by domestic tourists who participated in wildlife tourism activities (5.3 million nights were in QLD, representing a 36% share).
- The market accounted for 3% of all visitors to QLD, and 5% of all visitor nights spent in QLD.
- Over the last four years, the number of domestic tourists who participated in wildlife tourism activities in Australia increased by 4.4% annually on average.
- While in QLD there has been an increasing trend of 7.6% per year on average over the same period.

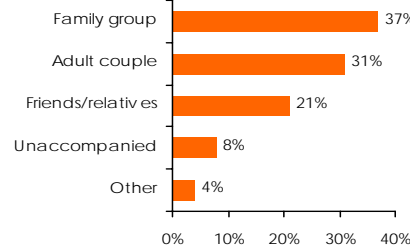
Destination	Wildlife Tourism Visitors ('000)	Share	AAGR* YE Dec 02-YE Dec 06	Wildlife Tourism Visitor nights ('000)	AAGR* YE Dec 02-YE Dec 06	Average length of stay (nights)
QLD	738	29%	7.6%	5,256	12.8%	7.1
NSW	835	33%	3.7%	3,966	6.6%	4.7
VIC	353	14%	-3.6%	1,582	-2.5%	4.5
Total Australia	2,527	-	4.4%	14,452	8.2%	5.7

* AAGR – average annual growth rate

Where are wildlife tourism visitors to QLD from?

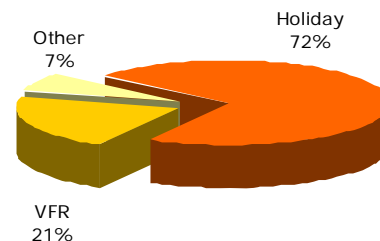


Who do they travel with?

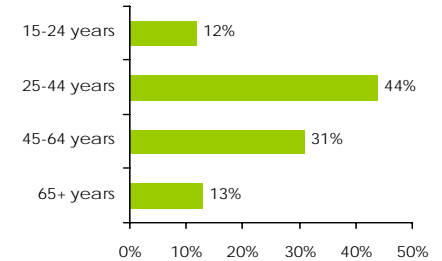


- There were more visitors travelling as a family group in 2002 compared with 2006. In 2006, more people travelled with friends or relatives than in 2002.

Why are they visiting QLD?



How old are they?



- 65 years and over and 45 to 64 years experienced growths between 2002 and 2006 (up 15% and 9% respectively).

What type of accommodation and transport do they use?

- 33% of all visitor nights spent in QLD by visitors who participated in wildlife tourism activities were spent in the home of a friend or relative, while 27% were spent in a hotel, motel, resort or motor inn. Almost half of the visitors travelled to QLD by private/rented vehicle (49%), and a further 43% travelled by air.

Where did wildlife tourism visitors go in QLD?

- 24% visited the Gold Coast (177,000 visitors) and 22% travelled to the Sunshine Coast (160,000 visitors).
- A similar number of visitors went to the Brisbane and Tropical North QLD regions, making up 15% and 14% of visitors respectively.
- Between 2002 and 2006, Tropical North QLD experienced an average annual growth of 33.6%. Brisbane had an average growth of 11.8% over the same period and the Gold Coast 7.8%

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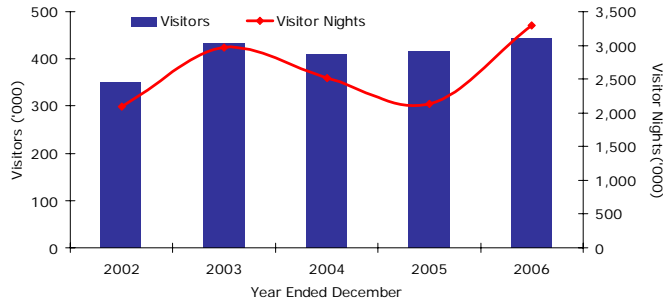
Year ended December 2006

Domestic Market – South East QLD

Source: National Visitor Survey, Tourism Research Australia.

Note: For the purposes of this fact sheet, South East Queensland refers to the combined regions of the Gold Coast, Brisbane and the Sunshine Coast.

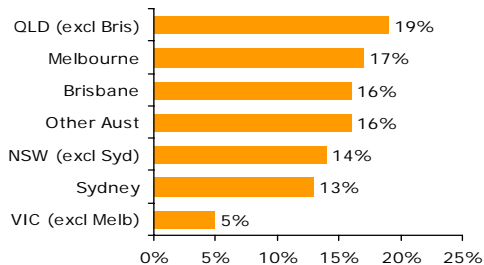
Wildlife Tourism Visitors to SEQ - Domestic



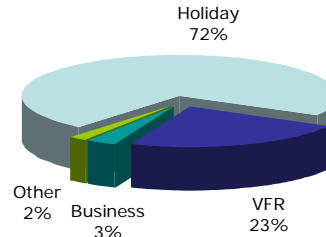
- In 2006, there were 443,000 domestic wildlife tourism visitors to SEQ, 3% of the total domestic visitors to Queensland. These visitors spent a total of 3,300,000 domestic wildlife tourism visitor nights, 4% of the total domestic visitor nights spent in Queensland.
- SEQ hosted 23% of the total domestic wildlife tourism visitor nights in Australia in 2006. This was an average annual increase of 12.1% from 2002.
- The average length of stay for domestic wildlife tourism visitors to SEQ was 7.4 nights in 2006, which represents an increase of 1.5 nights since 2002, when the average length of stay was 5.9.

Where are wildlife tourism visitors to SEQ from?

- The majority of visitors to SEQ to experience wildlife were from Queensland (excluding Brisbane, 19%) and Melbourne (17%).
- Brisbane and other Australian states made up 16% each of the share of wildlife visitors to SEQ.



Purpose of Visit

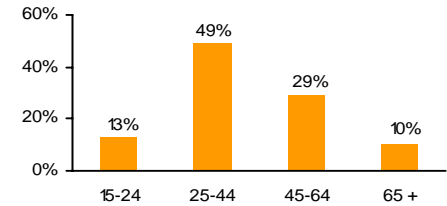


- Most domestic wildlife tourism visitors travelled to SEQ to holiday (72%). They also came to Australia to visit friends and relatives (21%).
- The VFR and holiday markets all showed good growth over the past year (up 18.8% and 4.9% respectively).

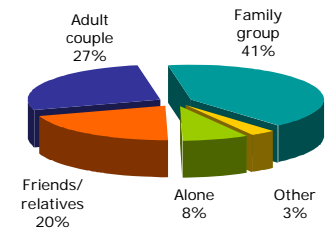
How old are they, who do they travel with and how do they travel within Australia?

- Almost half of the domestic wildlife tourism visitors to SEQ were aged 25 to 44 years (49%) and 29% were aged 45 to 64 years (29%).
- The number of wildlife tourism visitors aged 25 to 44 increased by 9.6% between 2005 and 2006.
- Family groups were the most common travel party, making up 41% of all domestic wildlife travel parties to SEQ in 2006.
- Adult couples (27%) and friends/relatives travelling together (20%) were the other main types of travel parties.

Age Group

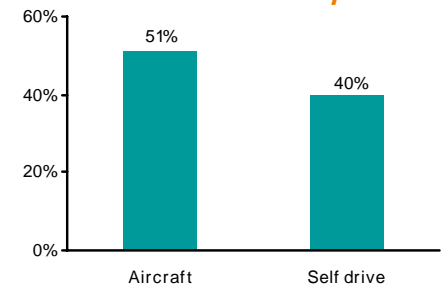


Travel Party



- Adult couples drove the overall increase in visitor numbers (up 55.8%).
- The two predominant forms of transport for visitors participating in wildlife activities in SEQ were air travel (51%) and private/ rented vehicle (40%). Air transport was the most popular form of transport due to the high number of interstate visitors.

Mode of Transport



Wildlife Tourism

Year ended December 2006



International Market to Australia

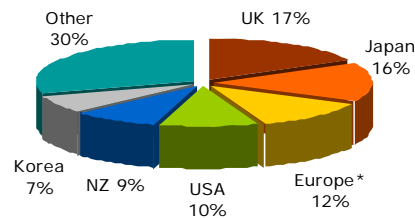
Source: International Visitor Survey, Tourism Research Australia.

The following information relates to tourists who engaged in the activities of "whale or dolphin watching (in the ocean)" or "visiting wildlife parks, zoos or aquariums" during their trip to Australia, **not necessarily in a particular state or region.**

Wildlife Tourism Visitors to Australia - Inbound



Visitor origin



- 2.2 million inbound tourists participated in wildlife tourism activities while in Australia (43% of all international visitors to the country). Of these, 54% (1.2 million visitors) made a stopover in QLD, and 63% (1.4 million visitors) made a stopover in NSW.
- 83.4 million visitor nights were spent in Australia by international tourists who participated in wildlife tourism activities during their trip.
- Over the last four years, the number of international tourists to Australia who participated in wildlife tourism activities has increased by 3.4% annually on average and visitor nights have experienced an average growth of 6.8% per year over the same period.

Top 5 Markets

	Visitors	AAGR YE Dec 02- YE Dec 06	% of total market who participated in wildlife tourism activities	Visitor Nights	ALOS
United Kingdom	360,800	3.1%	17%	15,102,600	41.9
Japan	352,300	-1.8%	16%	5,911,700	16.8
Europe *	257,800	7.5%	12%	13,992,100	54.3
USA	210,200	2.2%	10%	6,506,600	31.0
New Zealand	192,300	7.4%	9%	4,117,500	21.4
Total international	2,173,600	3.4%	-	83,411,900	38.4

* Europe excludes the UK and Germany.

Profile of inbound wildlife tourism visitors to Australia

International visitors who participated in wildlife tourism activities during their stay in the country typically:

- Were visiting for holiday (77%)
- Stayed in a rented house/apartment/unit or flat (31%) or at a friend/relative's home (22%)
- Mainly travelled by air transport (69%) and/or private/rented vehicle (39%)
- Were aged 25 to 44 years (43%) or 45 to 64 years (30%)
- Were travelling unaccompanied (40%) or as part of an adult couple (30%)
- Compared with all international visitors to Australia, inbound travellers who participated in wildlife tourism activities are more likely to stay in backpacker accommodation, but less likely to stay at a friend or relative's home. They are more likely to travel by air, more likely to be aged 15 to 24 years, and more likely to be travelling as part of an adult couple.

Data Sources:

The **National Visitor Survey** (NVS) is managed by Tourism Research Australia (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.

Note: As not all visitors are aware that they have visited a national or state park during their visit, this data may not encompass all visitors to national or state parks.

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