



WHAT ARE TOURISTS LOOKING FOR IN NATURE-BASED TOURISM?

GUIDED EDUCATIONAL EXPERIENCE

A place where you could experience and learn about natural wonders or rare animals or plants. Guides would be available to teach you about the environment or animals or plants during the day or night and information would be available for you to take home.

Interest level: overall, 29 per cent were interested in this experience, with 11 per cent 'extremely interested' and 19 per cent 'interested'. This equates to a target audience of approximately 4.1 million Australians.

Location preference: most (77 per cent) would prefer this experience in their own state (except in the ACT which is significantly lower than average). Overall, based on a combination of people who would be likely to visit the guided educational experience in their own state and those who would prefer it in a different state: 31 per cent would prefer to go to Queensland for this experience, 30 per cent to New South Wales, 19 per cent to Victoria, 18 per cent to Western Australia and 17 per cent to the Northern Territory.

Location type: most popular locations for this experience are: rainforest—26 per cent, outback Australia—17 per cent, coast—17 per cent.

Length of time at experience: 80 per cent would stay more than three days, including 38 per cent that would stay one to two weeks, 22 per cent for five days to one week, and 16 per cent for three to four days.

Price: optimal product price would be \$95 per person per day, although at \$145 per person per day, the product would still generate interest from 30 per cent (approximately 1.28 million Australians) of those who were interested in this experience.

Accompanied by: 43 per cent would travel with a partner or spouse, 23 per cent with family and children, and 19 per cent with friends.

This nature-based experience has significantly higher appeal to people who live by themselves.

FRIENDLY GUIDES

A remote location where you could stay in a rustic one to two-star motel with basic facilities. Local people and guides would be available to talk to and teach you about the local environment. You could take walks or explore nature parks.

Interest level: overall, 20 per cent were interested in this experience with 7 per cent 'extremely interested' and 13 per cent 'interested'. This could be a target audience of almost three million Australians.

Location preference: most (79 per cent) would prefer this experience in their own state (except in the ACT which is significantly lower than average). Overall, based on a combination of people who would be likely to visit the friendly guides experience in their own state and those who would prefer it in a different state: 40 per cent would prefer New South Wales, 32 per cent prefer Queensland, 22 per cent prefer the Northern Territory and 22 per cent also prefer Victoria.

Location type: most popular locations for this experience are: rainforest—20 per cent, coast—18 per cent, bush—16 per cent, desert—7 per cent.

Length of time at experience: 92 per cent would stay for more than three days, including 31 per cent that would stay for between one to two weeks, 27 per cent for five days to one week, 23 per cent for three to four days and 11 per cent for more than two weeks.

Price: optimal product price would be \$95 per person per night, although at \$145 per person per night, the product would still generate interest from just under 30 per cent (approximately 820 000 Australians) of those who were interested in this experience.

Accompanied by: 48 per cent would travel with a partner or spouse, 26 per cent with friends, 16 per cent with family and children, and 9 per cent on their own.

This nature-based experience has significantly higher appeal to people living by themselves and those with a household income between \$36 400 and \$51 999.

Interested in more information? Contact one of the organisations supporting the study or visit <http://www.industry.gov.au/tourism>

The Department of Industry, Tourism and Resources, along with industry, tourism and park stakeholders,* contracted Colmar Brunton Social Research to undertake a segmentation study into demand for nature-based and Indigenous tourism products.

Why do this study?

This segmentation study was designed to identify product concepts and provide information about their likely uptake. It includes answers to questions such as: how many people would go, profile of likely visitors, ideal locations for products, and competitive pricing for products.

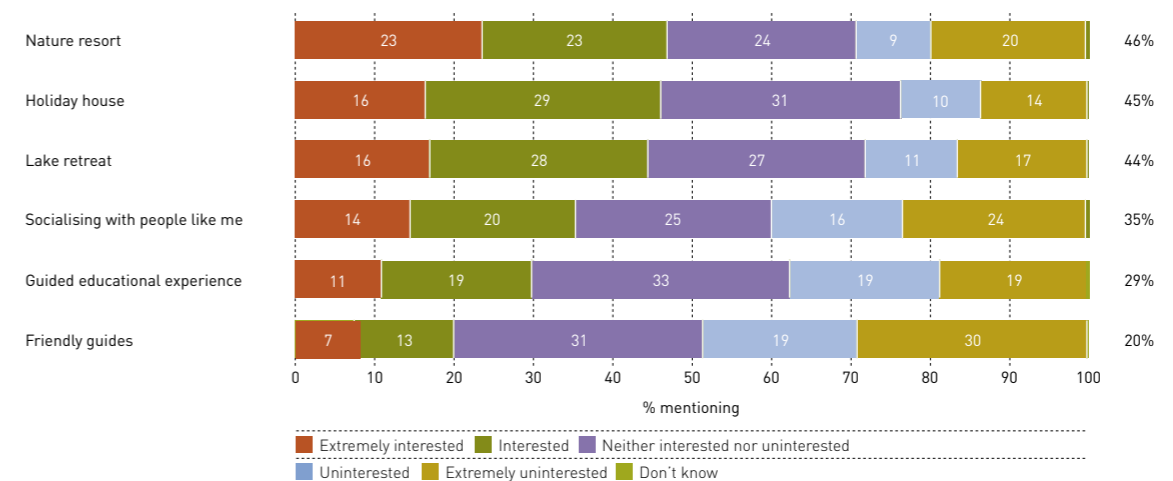
How was the study done?

Qualitative research based on a series of in-depth interviews was used to develop product concepts that matched the needs of nature-based tourists. In the quantitative phase of the project, these products were then tested in the marketplace through telephone interviews (800 interviews were held in total—100 in each of the states and territories). Data were normalised for gender and state to reflect the population of Australians over 18 years of age.

Overview of nature-based products

The vast majority of Australians (90 per cent) have participated in some type of nature-based activity in the last five years. Four out of five (80 per cent) Australians were interested in at least one of the six product concepts developed for this study. This research indicates that there is a greater interest in nature-based tourism from those working full-time, those aged between 25-34 years, those living in a three or four person household, and those who have taken a domestic holiday in the last 12 months and are intending to holiday in the next 12 months. The type of facilities and their relationships to nature were a central part of the nature-based products people wanted.

Level of interest in nature-based products



Source: Nature-Based and Indigenous New Product Research, 2004

*Stakeholders in this survey include Parks Australia North, Tourism Queensland, Northern Territory Tourist Commission, South Australian Tourism Commission, Tourism Tasmania, Parks Victoria, TTF Australia, Rio Tinto, Tourism Australia and the former Aboriginal and Torres Strait Islander Commission

NATURE-BASED PRODUCTS

Note: descriptions of the six nature-based products listed below are reproduced exactly as they were described to survey respondents.

NATURE RESORT

A secluded luxurious resort in a natural environment. The resort would blend in with the best features of the natural place. You could indulge in massages and beauty treatments or go bushwalking or horse-riding.

Interest level: overall, 46 per cent were interested in this experience, with 23 per cent 'extremely interested' and 23 per cent 'interested'. This would equate to a target audience of approximately 6.6 million Australians.

Location preference: Most (70 per cent) would prefer this experience in their own state (except in South Australia and the ACT which are significantly lower than average). Overall, based on a combination of those who would be likely to visit the experience in their own state and those who would prefer the resort in a different state: 41 per cent would prefer to go to Queensland for this experience, 30 per cent prefer New South Wales and 26 per cent prefer Victoria.

Location type: most popular locations for this experience are: coast—43 per cent, rainforest—19 per cent, mountains—14 per cent.

Length of time at experience: 92 per cent would stay for more than three days, including 38 per cent that would stay for one to two weeks, 23 per cent for five days to one week, 19 per cent for three to four days and 12 per cent for more than two weeks.

Price: optimal product price would be \$145 per person per night, although at \$195 per person per night the product would still generate interest from around 40 per cent (about 2.57 million Australians) of those who are interested in this experience.

Accompanied by: 55 per cent would travel with a partner or spouse, 19 per cent with family and children, and 15 per cent with friends.

This nature-based experience has significantly higher appeal to females, those aged between 25-34, and those with a household income over \$78 000.

HOLIDAY HOUSE

A secluded, scenic place to stay in a holiday house. All amenities would be provided, and the house would feel homely and welcoming. You could take walks, watch animals and birds in the surrounding bushland or drive to a local small town to shop or eat.

Interest level: overall, 45 per cent were interested in this experience, with 16 per cent 'extremely interested' and 29 per cent 'interested'. This would equate to a target audience of almost 6.5 million Australians.

Location preference: most (79 per cent) would prefer this experience in their own state (except in the ACT which is significantly lower than average). Overall, based on a combination of those who would be likely to visit the holiday house in their own state and those who would prefer it in a different state: 35 per cent would prefer to go to Queensland for this experience, 31 per cent prefer New South Wales and 26 per cent prefer Victoria.

Location type: most popular locations for this experience are: coast—33 per cent, mountains—19 per cent, rainforest—16 per cent.

Length of time at experience: 93 per cent would stay for more than three days, including 44 per cent that would stay for between one to two weeks, 21 per cent for five days to one week, and 19 per cent for three to four days.

Price: optimal product price would be \$95 per person per night, although at \$145 per person per night the product would still generate interest from around 35 per cent (about 2.26 million Australians) of those who were interested in this experience.

Accompanied by: 52 per cent would travel with a partner or spouse, 27 per cent with family and children, and 15 per cent with friends.

This nature-based experience has significantly higher appeal to those aged between 25-34, those mainly doing home duties and those who live in a 3-4 person household, as well as those with a household income of \$52 000 to \$77 999.

LAKE RETREAT

A cabin by a lake or waterway in a secluded bush setting. The cabin would provide basic facilities such as hot water and a kitchenette. You could take walks, picnic by the lake or fish from a small boat.

Interest level: overall, 44 per cent were interested in this experience, with 16 per cent 'extremely interested' and 28 per cent 'interested'. This equates to a target audience of around 6.3 million Australians.

Location preference: most (78 per cent) would prefer this experience in their own state (except in the ACT which is significantly lower than average). Overall, based on a combination of people who would be likely to visit the lake retreat in their own state and those who would prefer it in a different state: 33 per cent would prefer to go to Queensland for this experience, 32 per cent prefer New South Wales and 21 per cent prefer Victoria.

Location type: most popular locations for this experience are: lake or waterway—29 per cent, coast—22 per cent, rainforest—17 per cent.

Length of time at experience: 94 per cent would stay for more than three days, including 38 per cent that would stay for one to two weeks, 27 per cent for five days to one week, and 18 per cent for three to four days.

Price: optimal product price would be \$90 per person per night, although at \$115 per person per night, the product would still generate interest from around 30 per cent (1.89 million Australians) of those who were interested in this experience.

Accompanied by: 46 per cent would travel with a partner or spouse, 22 per cent with family and children, and 20 per cent with friends.

This nature-based experience has significantly higher appeal to those who live in South Australia and the Northern Territory, those aged between 25-34, those who have been on a domestic holiday in the last 12 months and are intending to in the next 12 months, and those who have a household income of \$36 400 to \$51 999.

SOCIALISING WITH PEOPLE LIKE ME

On a holiday in the bush or outback where you can meet people like you, take walks, go rock-climbing or talk around a campfire with the group. You could stay in tents or caravans to be close to nature. Meals would be cooked at communal barbeques or over campfires.

Interest level: overall, 35 per cent were interested in this experience, with 14 per cent 'extremely interested' and 20 per cent 'interested'. This could be a target audience of almost five million Australians.

Location preference: most (77 per cent) would prefer this experience in their own state (except in the ACT which is significantly lower than average). Overall, based on a combination of people who would be likely to visit the experience in their own state and those who would prefer it in a different state: 34 per cent would prefer to go to New South Wales for this experience, 30 per cent prefer Queensland, 21 per cent prefer Victoria and 17 per cent prefer the Northern Territory.

Location type: most popular locations for this experience are: outback Australia—23 per cent, coast—21 per cent, rainforest—15 per cent, bush—14 per cent.

Length of time at experience: 94 per cent would stay for more than three days, including 41 per cent that would stay for one to two weeks, 23 per cent for five days to one week, and 17 per cent for more than two weeks.

Price: optimal product price would be \$95 per person per night, although at \$145 per person per night, the product would still generate interest from over 20 per cent (about 1.23 million Australians) of those who were interested in this experience.

Accompanied by: 38 per cent would travel with a partner or spouse, 28 per cent with friends, and 22 per cent with family and children.

This nature-based experience has significantly higher appeal to people who live by themselves, those aged 35-44, those who have a household income of \$36 400 to \$51 999, and those who are unemployed and looking for work.