

This fact sheet provides a summary of the latest tourism data for the Adventure Tourism segment. Information includes: domestic and international visitor numbers, and visitor profiles such as origin, purpose of visit and travel party.

### DOMESTIC & INTERNATIONAL VISITATION FOR VISITORS PARTICIPATING IN ADVENTURE TOURISM ACTIVITIES

Adventure tourism visitors are defined as those who experienced bushwalking or rainforest walks, fishing, scuba diving, snorkeling, surfing, sailing, windsurfing, kayaking or other outdoor activities while on their trip to Australia.

Year Ending December 2009	Victoria	Australia
<b>Domestic</b>		
Overnight Visitors (000s)	2,430	13,090
Visitor Nights (000s)	9,315	71,600
Daytrip Visitors (000s)	2,348	11,425
<b>International</b>		
Overnight Visitors (000s)	585	1,850
Nights (000s)	15,558	94,752

NA: Figure is unreliable and unable to be published.

NB: International adventure tourism visitors to Victoria as defined above, did not indicate in which state the activities were undertaken while on their trip to Australia. Figure will differ from trend data below.

### International Visitation

Almost 1.9 million international adventure visitors travelled to Australia for the year ending December 2009, accounting for over 94.8 million nights. Of these visitors, 32% visited Victoria during this period.

Over 585,000 international adventure visitors travelled to Victoria in the year ending December 2009, accounting for 15.6 million nights. Adventure visitors represent 38% of all international visitors to the State.

Average length of stay for adventure tourism visitors to Australia was 51.2 nights, compared to an average length of stay of 26.6 nights for adventure tourism visitors to Victoria.

### Adventure Participation in Victoria

The table below examines adventure tourism visitors who participated in that activity while visiting Victoria.

	Year ending December		% change 08/09
	2008	2009	
<b>International Visitors (000s)</b>			
Victoria	216	215	
Australia	1,856	1,850	-0.3%
Vic's Mkt Share	11.6%	11.6%	
<b>International Visitor Nights (000s)</b>			
Victoria	8,716	9,229	
Australia	89,484	94,752	5.9%
Vic's Mkt Share	9.7%	9.7%	

\* Due to survey limitations, Victorian visitors and nights is an estimate based on the segment trend at the national level and applied to the Victorian result using the most recent 3 years of data.

# Average Annual Growth

In 2009, approximately 215,000 international visitors to Victoria participated in a local adventure experience while in the State. These visitors accounted for an estimated 9.2 million nights to Victoria in the period.

Compared to 2008, international adventure tourism visitors to Australia have decreased by 0.3%, although visitor nights have increased by 5.9%.

Victoria's market share of international adventure tourism visitors was estimated at 11.6% in the year 2009.

### Domestic Overnight Visitation

Australia received 13.1 million domestic overnight adventure visitors for the year ending December 2009, accounting for almost 71.6 million domestic adventure visitor nights. The average length of stay was 5.5 nights.

During the same period Victoria received 2.4 million domestic overnight adventure visitors, accounting for 9.3 million visitor nights. The average length of stay for adventure based visitors to Victoria was 3.8 nights.

	Year ending December					AAG* 99-09	% change 08/09
	1999	2006	2007	2008	2009		
<b>Domestic Visitors (000s)</b>							
Victoria	2,273	3,059	3,117	2,724	2,430	0.7%	-10.8%
Australia	11,875	15,405	15,660	13,729	13,090	1.0%	-4.7%
Vic's Mkt Share	19.1%	19.9%	19.9%	19.8%	18.6%		
<b>Domestic Visitor Nights (000s)</b>							
Victoria	8,866	10,785	10,882	10,080	9,315	0.5%	-7.6%
Australia	68,689	83,344	87,154	74,521	71,600	0.4%	-3.9%
Vic's Mkt Share	12.9%	12.9%	12.5%	13.5%	13.0%		
<b>Domestic Daytrips (000s)</b>							
Victoria	2,288	2,599	2,825	3,137	2,348	0.3%	-25.2%
Australia	11,146	13,529	13,543	11,680	11,425	0.2%	-2.2%
Vic's Mkt Share	20.5%	19.2%	20.9%	26.9%	20.6%		

\* Average Annual Growth

Over the long term (1999 to 2009), Victoria experienced an increase in domestic adventure visitors (+0.7% p.a) and visitor nights (+0.5% p.a). Australia saw an increase in domestic visitors (+1.0% p.a) and visitor nights (+0.4%) over this period.

### Domestic Daytrip Visitation

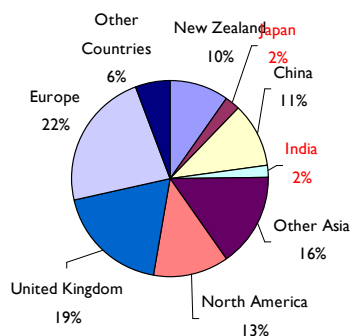
There were over 11.4 million daytrips undertaken in Australia by adventure tourism visitors in the year ending December 2009.

In Victoria, there were 2.3 million daytrips undertaken by domestic adventure visitors. Domestic adventure daytrips in Victoria decreased by 25.2% from 2008 to 2009, compared to a decrease of 2.2% in Australia.

## PROFILE OF INTERNATIONAL ADVENTURE VISITORS

The analysis following examines those who are adventure tourism visitors who participated in that activity while visiting Victoria. Due to survey limitations, data for Victoria is based on three years of data to December 2009.

### Origin of Adventure Visitors to Victoria



The largest single source market of adventure visitors to Victoria for the year ending December 2009 was Europe, with 22% or an estimated 13,000 adventure visitors. Other strong markets include the United Kingdom (est. 9,100) and Other Asia (excluding Japan, China and India est. 10,900).

### Age Group (% of International Adventure Tourism Visitors)

International adventure tourism visitors to Victoria were most likely to be aged between 25-44 years (42%), 45-64 years (29%) or 15-24 years (22%).

Age Group	Visitors to Victoria	Visitors to Australia	Total Travellers
15 - 24 years	22%	24%	17%
25 - 44 years	42%	42%	41%
45 - 64 years	29%	27%	34%
65 years or over	7%	7%	8%

## TRAVEL BEHAVIOUR OF INTERNATIONAL ADVENTURE VISITORS

### Purpose of Visit (% of International Adventure Tourism Visitors)

53% of adventure visitors to the Victoria were on a holiday and 26% were visiting friends and relatives.

Purpose of Visit	Visitors to Victoria	Visitors to Australia	Total Travellers
Holiday	53%	62%	46%
Visiting friends or relatives	26%	20%	25%
Business	6%	4%	15%
Education	11%	9%	8%
Employment	4%	3%	2%
Other	1%	1%	4%

### Length of Visit (% of International Adventure Tourism Visitors)

43% of international adventure visitors to Victoria were on a visit of 1-9 nights and a further 33% stayed 10-39 nights.

Length of Visit	Visitors to Victoria	Visitors to Australia	Total Travellers
1-9 nights	43%	27%	35%
10-39 nights	33%	44%	40%
40-99 nights	10%	14%	12%
100-199 nights	7%	8%	7%
200+ nights	7%	7%	6%

### Travel Party (% of International Adventure Tourism Visitors)

The majority of international adventure visitors to the State travelled alone (54%) or as an adult couple (26%).

Travel Party	Visitors to Victoria	Visitors to Australia	Total Travellers
Travelling Alone	54%	52%	59%
Adult Couple	26%	27%	22%
Family Group - parents and children	8%	9%	9%
Friends or relatives	9%	10%	8%
Business associates	3%	2%	3%

### Accommodation (% of International Adventure Tourism Visitor Nights)

Of all international adventure visitor nights in Victoria for 2009, 47% were spent in a rented house/apartment or flat and 22% were spent in the home of a friend or relative.

Accommodation	Visitors to Victoria	Visitors to Australia	Total Travellers
Hotel, resort, motel, motor Inn	8%	11%	11%
B&B	3%	1%	1%
Rented house / apartment / unit / flat	47%	36%	37%
Caravan & Camping	4%	4%	4%
Home of friend or relative	22%	21%	23%
Backpacker / hostel	6%	14%	12%
Own property (eg Holiday house)	1%	1%	1%
Other	9%	13%	12%

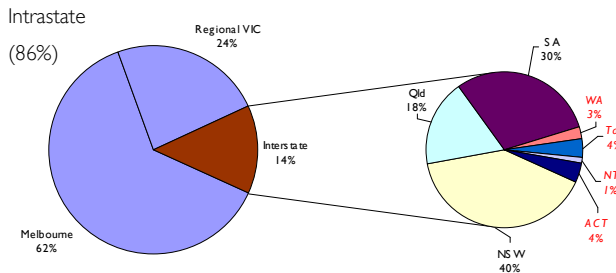
### Adventure Activities (% of International Tourism Visitors)

71% of international adventure visitors to Victoria went bushwalking or on rainforest walks, 19% did other outdoor activities and 15% went snorkeling whilst on their holiday.

Activity	Visitors to Victoria	Visitors to Australia
Bushwalking / rainforest walks	71%	67%
Snorkelling	15%	31%
Sailing windsurfing kayaking etc	14%	17%
Surfing	14%	16%
Scuba diving	8%	14%
Go fishing	14%	14%
Other outdoor activities	19%	20%

## PROFILE OF DOMESTIC ADVENTURE VISITORS TO VICTORIA

### Domestic Overnight Visitors to Victoria by Origin



Intrastate visitors were the key market for the adventure segment, accounting for 86% of total domestic overnight visitors to Victoria. Interstate visitors, accounting for 14% of total domestic adventure visitors, were primarily driven by the New South Wales market, comprising 50% of all adventure interstate visitors to the State, and the South Australian market, which comprises 24%.

### Age Group (% of Adventure Visitors)

Domestic overnight adventure visitors to Victoria were most likely to be aged between 25-44 years (38%) or 45-64 years old (32%).

Age Group	Visitors to Victoria	Visitors to Australia	Total Australia
15 - 24 years	20%	17%	15%
25 - 44 years	38%	40%	36%
45 - 64 years	32%	33%	36%
65 years or over	10%	9%	13%

### Lifecycle (% of Adventure Visitors)

Domestic overnight adventure visitors to the State tended to be in the parents (41%) and single, no kids (20%) lifecycle segments.

Lifecycle	Visitors to Victoria	Visitors to Australia	Total Australia
Single, no kids	20%	19%	17%
Couple, no kids	14%	14%	12%
Parent	41%	42%	38%
Older working	10%	12%	16%
Older non-working	15%	14%	18%

## Roy Morgan Value Segments<sup>1</sup> (% of Adventure Visitors)

Adventure visitors to Victoria were more likely to come from the Visible Achievement (19%), Socially Aware (19%) and Traditional Family Life (16%) segments.

Values Segment	Victoria	Australia
Basic Needs	1%	1%
Fairer Deal	2%	2%
Traditional Family Life	16%	14%
Conventional Family Life	14%	15%
'Look At Me'	13%	11%
Something Better	6%	6%
Real Conservatism	3%	4%
Young Optimism	7%	7%
Visible Achievement	19%	22%
Socially Aware	19%	18%

## TRAVEL BEHAVIOUR OF DOMESTIC ADVENTURE VISITORS TO VICTORIA

### Purpose of Visit (% of Adventure Visitors)

77% of adventure visitors to the state were holiday visitors and 16% were visiting friends and relatives.

Purpose of Visit	Visitors to Victoria	Visitors to Australia	Total Australia
Holiday or leisure	77%	76%	45%
Visiting friends and relatives	16%	19%	33%
Business	3%	4%	19%
Other	4%	4%	5%

### Length of Visit (% of Adventure Visitors)

64% of domestic overnight adventure visitors to Victoria were on a short visit of 1 to 3 nights. A further 25% stayed 4 to 7 nights, whilst the remaining 11% stayed 8 or more nights.

Length of Trip	Visitors to Victoria	Visitors to Australia	Total Australia
1-3 nights	64%	53%	67%
4-7 nights	25%	29%	23%
8-14 nights	7%	13%	7%
15+ nights	4%	5%	3%

<sup>1</sup> Developed in conjunction with Colin Benjamin of The Horizons Network.

### Travel Party (% of Adventure Visitors)

The majority of adventure visitors to the state travelled as a family group (34%), or with friends or relatives (26%), or in an adult couple (27%).

Travel Party	Visitors to Victoria	Visitors to Australia	Total Australia
Travelling Alone	9%	10%	25%
Adult Couple	27%	26%	28%
Family Group - parents and children	34%	34%	24%
Friends or relatives	26%	26%	18%
Business associates	1%	1%	5%
Other	4%	3%	2%

### Seasonality (% of Adventure Visitors)

Adventure visitation to Victoria peaked during summer, attracting the highest proportion of adventure visitors (36% of visitors) and stayed strong through autumn (26%) and spring (21%). In comparison, visitation during winter was relatively low, attracting only 18% of visitors.

Month	Victoria	Australia
December	6%	7%
January	23%	19%
February	6%	5%
<b>Summer</b>	<b>36%</b>	<b>30%</b>
March	8%	8%
April	10%	12%
May	8%	7%
<b>Autumn</b>	<b>26%</b>	<b>26%</b>
June	6%	6%
July	7%	8%
August	4%	6%
<b>Winter</b>	<b>18%</b>	<b>19%</b>
September	6%	7%
October	6%	9%
November	8%	8%
<b>Spring</b>	<b>21%</b>	<b>24%</b>

### Accommodation (% of Adventure Nights)

Of all domestic adventure visitor nights in the state for 2009, 39% were spent in a caravan park or camping, with a further 25% at the home of a friend or relative.

Accommodation	Visitors to Victoria	Visitors to Australia	Total Traveller
Hotel, resort, motel or motor Inn	10%	18%	24%
Guest house or B&B	2%	1%	1%
Rented house, apartment, flat or unit	12%	15%	12%
Caravan or camping	39%	34%	25%
Friends or relatives property	25%	23%	30%
Own property (e.g. holiday house)	8%	5%	4%
Other	3%	4%	3%

### Adventure Activities (% of Visitors)

52% of Victorian adventure visitors had been on a bush or rainforest walk, 29% went fishing, 15% had participated in water activities or sports and 16% participated in other outdoor activities such as horse riding or rock climbing.

Activity	Visitors to Victoria	Visitors to Australia
Bushwalking or rainforest walks	49%	46%
Snorkelling	1%	5%
Water activities or sports	18%	19%
Surfing	7%	8%
Scuba diving	0%	1%
Go fishing	30%	34%
Other outdoor activities	13%	14%

Sources:

- *National and International Visitor Surveys*, year ending December 2009, Tourism Research Australia
- *Holiday Tracking Survey*, year ending June 2008, Roy Morgan Research

Definition of Adventure:

- International - 'Bushwalking/rainforest walks', 'Go fishing', 'Scuba diving', 'Snorkelling', 'Surfing', 'Sailing, windsurfing, kayaking etc.', 'Other outdoor activities'.
- Domestic - 'Bushwalking/rainforest walks', 'Go fishing', 'Scuba diving', 'Snorkelling', 'Surfing', 'Water activities or sports', 'Other outdoor activities'.

Figures might not add up due to rounding.

Figures in red italics are unreliable and should be used with caution.

Updated by Tourism Victoria June 2010.