

Nature-based Tourism

Market Profile Year Ending December 2009

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

DOMESTIC & INTERNATIONAL VISITATION FOR VISITORS PARTICIPATING IN NATURE-BASED TOURISM ACTIVITIES

Nature-based visitors are defined as those who visited the beach, a national or state park or a botanical or public garden, and/or went bushwalking, fishing, whale or dolphin watching or participated in other water and outdoor activities while on their trip to Australia.

Year Ending December 2009	Victoria	Australia
Domestic		
Overnight Visitors (000s)	5,137	26,819
Visitor Nights (000s)	18,869	134,931
Daytrip Visitors (000s)	7,571	32,538
International		
Overnight Visitors (000s)	1,136	3,821
Nights (000s)	31,953	156,275

NB: International nature-based 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

Over 3.8 million international nature-based tourism visitors travelled to Australia in the year ending December 2009, accounting for 156.3 million nights. Of these visitors, 29.7% visited Victoria during this period.

Over 1.1 million nature-based tourism visitors to Australia travelled to Victoria on their trip in the year ending December 2009, accounting for 32.0 million nights. Nature-based tourism visitors represent 74% of all international visitors to the State.

Average length of stay for nature-based tourism visitors to Australia was 40.9 nights, compared to an average length of stay of 28.1 nights for nature-based tourism visitors to Victoria.

Nature-based Activity Participation in Victoria

The table below examines nature-based tourism visitors who participated in that activity while visiting Victoria.

	Year ending December		% change 08/09
	2008	2009	
International Visitors (000s)			
Victoria	759	750	
Australia	3,867	3,821	-1.2%
Vic's Mkt Share	19.6%	19.6%	
International Visitor Nights (000s)			
Victoria	22,842	23,940	
Australia	149,110	156,275	4.8%
Vic's Mkt Share	15.3%	15.3%	

Due to survey limitations, estimates of nature-based tourism activity participation in Victoria is based on the rate of participation of a proportion of the overall sample (for 3 years to December 2009) and applied to the estimate of total international visitors to Victoria (year ending December 2009). Segment trends at the national level are applied to this estimate.

In 2009, approximately 750,000 visitors to Victoria participated in a local nature-based experience while in the State. These visitors accounted for an estimated 23.9 million nights in Victoria in the period.

Compared to 2008, international nature-based tourism visitors to Australia have declined by 1.2% for visitors but increased by 4.8% for visitor nights.

Victoria's market share of international nature-based tourism visitors is estimated to be 19.6% in the year 2009.

Domestic Overnight Visitation

Australia received 26.8 million domestic overnight nature-based visitors for the year ending December 2009, accounting for 134.9 million visitor nights. The average length of stay was 5.0 nights.

During the same period Victoria received 5.1 million domestic overnight nature-based visitors, accounting for 18.9 million visitor nights. The average length of stay for nature-based visitors to Victoria was 3.7 nights.

	Year ending December					AAG* 99-09	% change 08/09
	1999	2006	2007	2008	2009		
Domestic Visitors (000s)							
Victoria	6,513	6,004	6,345	5,731	5,137	-2.3%	-10.4%
Australia	30,697	30,464	30,888	27,751	26,819	-1.3%	-3.4%
Vic's Mkt Share	21.2%	19.7%	20.5%	20.7%	19.2%		
Domestic Visitor Nights (000s)							
Victoria	23,873	20,395	21,650	20,475	18,869	-2.3%	-7.8%
Australia	162,846	152,286	156,963	138,919	134,931	-1.9%	-2.9%
Vic's Mkt Share	14.7%	13.4%	13.8%	14.7%	14.0%		
Domestic Daytrips(000s)							
Victoria	10,961	7,124	8,377	8,080	7,571	-3.6%	-6.3%
Australia	43,400	34,648	36,953	32,144	32,538	-2.8%	1.2%
Vic's Mkt Share	25.3%	20.6%	22.7%	25.1%	23.3%		

* Average Annual Growth

Compared to the previous year, Victoria experienced a decrease in domestic nature-based visitors (-10.4%) and visitor nights (-7.8%). Australia also saw decreases in nature based domestic visitors (-3.4%) and visitor nights (-2.9%) over this period.

Since 1999, there has been an average annual decrease of 2.3% in domestic nature-based visitors to Victoria (compared to -1.3% for Australia) and a decrease of -2.3% for visitor nights spent by these visitors in the State (compared to a decline of 1.9% for Australia).

Victoria's market share of the domestic nature-based visitors has decreased by 2.0 percentage points since 1999, to 19.2% in 2009. In 2009, the market share of the nights spent by this segment in Victoria fell 0.7 percentage points to 14.0% when compared to 1999 levels (14.7%).

Domestic Daytrip Visitation

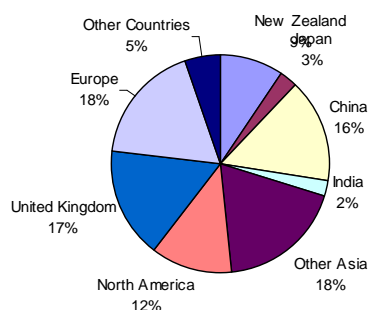
There were 32.5 million daytrips undertaken in Australia by domestic nature-based visitors in the year ending December 2009.

7.6 million daytrips were undertaken in Victoria by domestic nature-based visitors.

PROFILE OF INTERNATIONAL NATURE-BASED VISITORS

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

Origin of Nature-based Visitors to Victoria



The largest single source market of nature-based tourism visitors to Victoria was Asia (excluding China, Japan and India) with 19% or an estimated 43,400 visitors in 2009. Other key markets include Europe (est. 37,800), China (est. 39,200) and the United Kingdom (est. 30,300).

Age Group (% of International Nature-based Visitors)

International nature-based visitors to Victoria were most likely to be aged between 25-44 years (41%) or 45-64 years (33%).

Age Group	Visitors to Victoria	Visitors to Australia
15 - 24 years	18%	20%
25 - 44 years	41%	40%
45 - 64 years	33%	32%
65 years or over	8%	8%

TRAVEL BEHAVIOUR OF INTERNATIONAL NATURE-BASED VISITORS

Purpose of Visit (% of International Nature-based Visitors)

56% of international nature-based visitors to the State were holiday visitors and 25% were visiting friends and relatives.

Purpose of Visit	Visitors to Victoria	Visitors to Australia
Holiday	56%	55%
Visiting friends or relatives	25%	25%
Business	8%	8%
Education	8%	9%
Employment	2%	2%
Other	1%	2%

Length of Visit (% of International Nature-based Visitors)

56% of international nature-based visitors to Victoria were on a visit of 1 to 9 nights and a further 27% stayed 10 to 39 nights.

Length of Visit	Visitors to Victoria	Visitors to Australia
1-9 nights	56%	37%
10-39 nights	27%	40%
40-99 nights	8%	11%
100-199 nights	5%	7%
200+ nights	4%	5%

Travel Party (% of International Nature-based Visitors)

The majority of international nature-based visitors to the State travelled alone (48%) or as a couple (27%).

Travel Party	Visitors to Victoria	Visitors to Australia
Travelling Alone	48%	53%
Adult Couple	27%	26%
Family Group - parents and children	10%	10%
Friends or relatives	12%	9%
Business associates	3%	2%

Nature-based Tourism Market Profile Year Ending December 2009

Accommodation (% of International Nature-based Visitor Nights)

Of all international nature-based visitor nights in Victoria for 2009, 39% were spent in a rented house/apartment or flat and 28% were spent in the home of a friend or relative.

Accommodation	Visitors to Victoria	Visitors to Australia
Hotel, resort, motel, motor Inn	13%	12%
B&B	2%	1%
Rented house / apartment / unit / flat	39%	38%
Caravan & Camping	2%	3%
Home of friend or relative	28%	25%
Backpacker / hostel	6%	9%
Own property (eg Holiday house)	3%	1%
Other	8%	12%

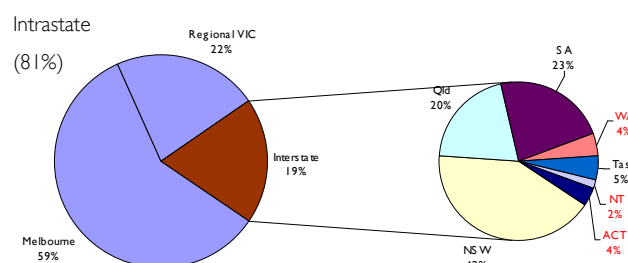
Nature-based Activities (% of International Visitors)

83% of international nature-based visitors in Victoria went to the beach, 70% visited a national or State park and 63% went to a botanical or public garden.

Activity	Visitors to Victoria	Visitors to Australia
Go to the beach (incl swimming, surfing, diving)	83%	82%
Visit national parks / State parks	70%	57%
Visit botanical or other public gardens	63%	48%
Bushwalking / rainforest walks	42%	33%
Snorkelling	11%	15%
Go whale or dolphin watching (in the ocean)	10%	11%
Other outdoor activities	10%	10%
Sailing windsurfing kayaking etc	8%	8%
Surfing	7%	8%
Scuba diving	5%	7%
Go fishing	6%	7%

PROFILE OF DOMESTIC NATURE-BASED VISITORS TO VICTORIA

Origin of Domestic Overnight Nature-based Visitors to Victoria



Intrastate visitors were the key market for the nature-based segment in Victoria, accounting for 81% of total domestic overnight nature-based visitors to the State. Interstate visitors accounted for 19% of the market, primarily driven by New South Wales with 42% of all interstate nature-based visitors.

Age Group (% of Nature-based Visitors)

Domestic overnight nature-based visitors to Victoria were most likely to be aged between 25-44 years (37%) or 45-64 years old (34%).

Age Group	Visitors to Victoria	Visitors to Australia
15 - 24 years	18%	17%
25 - 44 years	37%	38%
45 - 64 years	34%	33%
65 years or over	11%	11%

Lifecycle (% of Nature-based Visitors)

Domestic overnight nature-based visitors to the State tended to be in the parent (39%) and single, no kids (20%) lifecycle segments.

Lifecycle	Visitors to Victoria	Visitors to Australia
Single, no kids	20%	18%
Couple, no kids	12%	12%
Parent	39%	40%
Older working	13%	13%
Older non-working	16%	16%

Roy Morgan Value Segments¹ (% of Nature-based Visitors)

Nature-based visitors to Victoria were most likely to come from the Visible Achievement (20%), Socially Aware (19%) and Traditional Family Life (18%) segments.

Values Segment	Victoria	Australia
Basic Needs	1%	1%
Fairer Deal	2%	2%
Traditional Family Life	18%	16%
Conventional Family Life	14%	14%
'Look At Me'	12%	10%
Something Better	5%	6%
Real Conservatism	4%	4%
Young Optimism	7%	7%
Visible Achievement	20%	23%
Socially Aware	19%	18%

¹ Developed in conjunction with Colin Benjamin of The Horizons Network.

TRAVEL BEHAVIOUR OF DOMESTIC NATURE-BASED VISITORS TO VICTORIA

Purpose of Visit (% of Nature-based Visitors)

70% of nature-based visitors to the State were holiday visitors and 23% were visiting friends and relatives.

Purpose of Visit	Visitors to Victoria	Visitors to Australia
Holiday or leisure	70%	68%
Visiting friends and relatives	23%	28%
Business	4%	5%
Other	3%	3%

Travel Party (% of Nature-based Visitors)

The majority of nature-based visitors to the State traveled as a family group (32%), a couple (29%), or with friends or relatives (25%).

Travel Party	Visitors to Victoria	Visitors to Australia
Travelling Alone	11%	12%
Adult Couple	29%	29%
Family Group - parents and children	32%	33%
Friends or relatives	25%	23%
Business associates	1%	1%
Other	3%	2%

Seasonality (% of Nature-based Visitors)

Visitation to Victoria peaked during summer, attracting the highest proportion of nature-based visitors (35% of visitors) and was also relatively strong in autumn (25%). In comparison, visitation during winter was low, attracting 17% of visitors.

Month	Victoria	Australia
December	7%	7%
January	21%	17%
February	7%	6%
Summer	35%	31%
March	9%	8%
April	10%	10%
May	7%	6%
Autumn	25%	25%
June	6%	6%
July	6%	7%
August	5%	6%
Winter	17%	19%
September	7%	8%
October	7%	9%
November	9%	8%
Spring	23%	25%

Length of Visit (% of Nature-based Visitors)

66% of domestic overnight nature-based visitors to Victoria were on a short visit of 1 to 3 nights. A further 24% stayed 4 to 7 nights, whilst the remaining 10% stayed 8 or more nights.

Length of Trip	Visitors to Victoria	Visitors to Australia
1-3 nights	66%	55%
4-7 nights	24%	29%
8-14 nights	7%	12%
15+ nights	3%	4%

Accommodation (% of Nature-based Nights)

Of all domestic nature-based visitor nights in the State for 2009, 32% of visitors stayed with friends or relatives, 27% were spent in a caravan park or camping.

Accommodation	Visitors to Victoria	Visitors to Australia
Hotel, resort, motel or motor Inn	14%	22%
Guest house or B&B	2%	1%
Rented house, apartment, flat or unit	12%	15%
Caravan or camping	27%	24%
Friends or relatives property	32%	30%
Own property (e.g. holiday house)	10%	5%
Other	3%	3%

Nature-based Activities (% of Visitors)

50% of Victorian nature-based visitors went to the beach, 23% went bushwalking or on a rainforest walk, 21% went to national or State parks and 14% went fishing.

Activity	Visitors to Victoria	Visitors to Australia
Go to the beach (including swimming)	50%	57%
Visit national parks or State parks	21%	22%
Visit botanical or other public gardens	10%	9%
Bushwalking or rainforest walks	23%	22%
Snorkelling	0%	2%
Go whale or dolphin watching (in the ocean)	1%	2%
Other outdoor activities	6%	7%
Water activities or sports	9%	9%
Surfing	4%	4%
Scuba diving	0%	1%
Go fishing	14%	16%

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 nature-based tourism:

- International & Domestic – 'Go to the beach', 'Bushwalking or rainforest walks', 'Visit national parks or state parks', 'Go fishing', 'Other outdoor activities', 'Visit botanical or other public gardens', 'Water activities or sports', 'Surfing', 'Go whale or dolphin watching', 'Snorkelling', 'Scuba diving', 'Picnics & BBQs' (not in International) or 'Visit the reef' (not in International)

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.