

Nature-Based Tourism

in

Tasmania

1998 – 99

Up-Date

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EXECUTIVE SUMMARY

- Tasmania's natural environment sets it apart from the other States and Territories and is an important element of its image as a tourist destination.
- The majority of visitors to Tasmania (361,000 or 69%) participate in nature-based tourism.
- In particular, 86% of overseas visitors engage in this activity.
- Expenditure by nature-based tourists is substantially above-average, per visitor and per night.
- Visitors to Tasmania are aware of the State's natural attributes and the majority take the opportunity to indulge in nature-based tourism during their visits, even if only at a relatively low level of participation.
- Ecotourism and adventure-style holiday packages provide an opportunity for raising this level of participation.
- Fly-drive tours of seven or ten nights, packaged with guest-house or holiday unit accommodation, are particularly favoured but TT-Line ferry packages also offer opportunities for enhancing the rate of participation.
- As in 1993, New South Wales and Victoria remain the major markets, though overseas visitors have the highest participation rates.
- Nature-based tourism appeals to all age groups, but to women rather more than to men. It is important that it be promoted as a shared experience. Attention should be paid to ensuring that the content of promotional material reflects these factors.
- Nature-based tourism appeals most to those at the upper end of the socio-economic spectrum - this should be kept firmly in mind when promoting ecotourism and adventure-type travel and when tailoring product to suit the market.
- There are indications of increasingly genuine interest in nature-based tourism. This is encouraging news for industry operators contemplating the further development of facilities and services aimed at this market.
- It appears that the provision of a high standard of accommodation and associated travel services is a necessary precursor to the development of specific localities for ecotourism and adventure-style activities.
- Managed responsibly, Tasmania's natural environment will continue to be an important component in the further development of the State's tourism industry.

INTRODUCTION

The early 1990s was a period of mounting interest in ecotourism and adventure-style tourism. In Tasmania, this culminated in the World Congress on Adventure Travel and Ecotourism held at Wrest Point Hotel-Casino, Hobart, in November 1994

Reflecting the level of interest at the time, the 1993 Tasmanian Visitor Survey was expanded to include a suite of questions addressing the use of natural areas by visitors to the State. This data was presented in the report "Nature-Based Tourism in Tasmania" (June 1994). The aim of this current paper is to up-date as much as possible of the previous report with information from the 1998-99 Tasmanian Visitor Survey .

This information is of potential value to Tasmanian tourism operators in tailoring their activities and services towards satisfying visitors' requirements for participating in nature-based tourism and in more effectively marketing this type of travel product .

The selection criteria for this group of visitors are:

- participation in the following activities -
 - using a four-wheel-drive/recreational vehicle
 - canoeing/sea kayaking
 - boating/sailing
 - bush-walking
 - trout angling
 - recreational sea fishing (new since 1993)
 - wildlife viewing (new)
 - horse-riding (new)
 - (going on a river cruise has been dropped since 1993)

- visiting the following natural areas -
 - Mt Wellington
 - Hartz Mountains
 - Hastings Caves
 - Abel Tasman (including Fortescue) Forest Reserve
 - Mt Field
 - Lake Pedder
 - Lake St Clair
 - Cradle Mountain
 - Marakoopa/King Solomon's Caves
 - Liffey Falls
 - Gordon River
 - Great Lake/Central Plateau area
 - Douglas-Apsley National Park
 - Freycinet Peninsula
 - South West (Melaleuca Inlet/Port Davey area)

Dip Falls/Big Tree (new since 1993)
Pieman River/Corinna (new)
Teepookana/King River Forest Drive (new)
Arve Road Forest Drive (new)
Wielangta Forest Drive (new)

The following natural areas have been dropped from the survey since 1993:

- Milkshakes Forest
- Reserve, Tahune Forest Reserve
- Walls of Jerusalem N.P.
- Franklin-Gordon Wild Rivers National Park
- Maria Island
- Mt William
- Asbestos Range N.P.

Of the estimated 524,000 adult visitors to Tasmania during 1998-99, some 361,000 (69%) participated in nature-based tourism (NBT) according to the above criteria.

Caution

The statistical information contained in this paper has been prepared by Tourism Tasmania for its own purposes. It should not be relied upon as a substitute for professional advice and individual investigation. The State of Tasmania, its employees and agents will not be responsible for any loss whatsoever arising from the use of or reliance on this information.

Readers are advised to exercise caution when interpreting data contained in this paper. It is based on estimates obtained from a sample survey, which may be subject to chance variation (or sampling error). The smaller the estimate, the larger the relative sampling error.

SUMMARY OF RESULTS

Origin of nature-based tourists

Between the two periods, the number of visitors who participated in nature-based tourism increased by 38,000 (up 12%). International visitors posted the highest growth (up 13,000 or 26%), while those from mainland Australia rose by 25,000 (up 9%). New South Wales and Victoria still account for 55% of the total (60% in 1993).

Place of Origin	Proportions of those Visitors who participated in NBT (%)		NBT Participants as a proportion of all Visitors (%)	
	1993	1998-99	1993	1998-99
British Isles	3.1	4.2	..	..
Europe	3.5	3.8	..	..
North America	4.7	5.6	..	..
New Zealand	2.2	1.5	..	..
South and East Asia	1.2	1.8	..	..
Other Overseas	0.7	0.6	..	..
All Overseas	15.5	17.5	89	86
New South Wales	27.9	23.9	82	73
ACT	4.1	2.8	68	58
Victoria	32.3	31.2	68	58
Queensland	8.1	11.6	76	76
South Australia	7.0	6.7	81	73
Western Australia	4.6	5.9	86	74
Northern Territory	0.4	0.5	..	..
All Australia	84.5	82.5	75	66
Totals	323,000	361,000	77	69

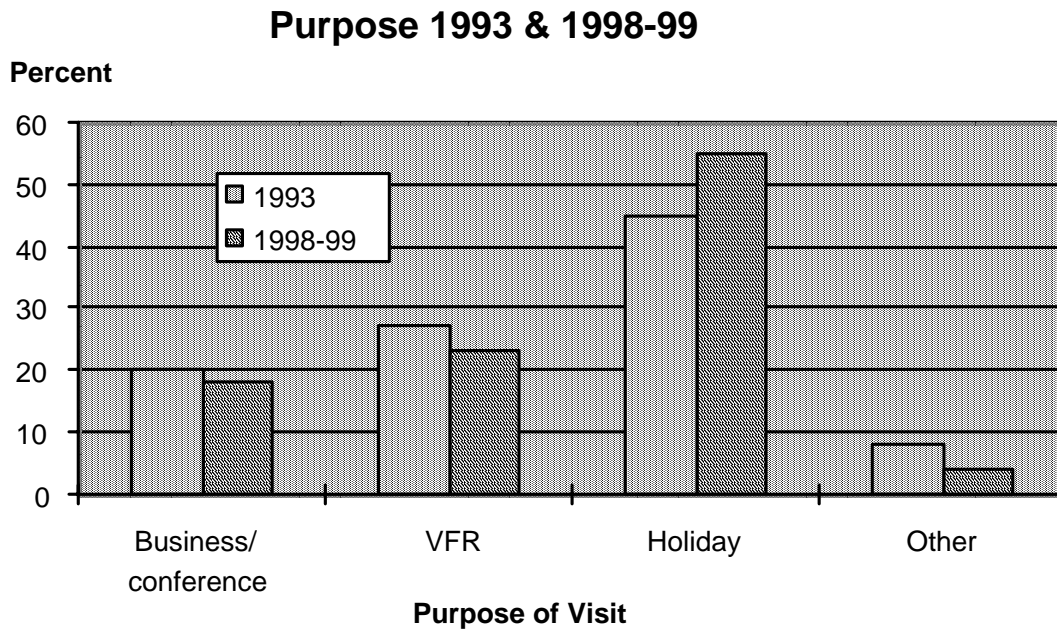
“ .. ” - these numbers are too small to be reliable.

Estimated Visitors	1993	1998-99	% Change
Total Visitors to Tasmania	421,000	524,000	+24%
No. of NBT participants	323,000	361,000	+12%
Participation rate	77%	69%	-10%

It is not obvious why the participation rate should have fallen, since most of the increase from 1993 to 1998-99 was in holiday visitors to the State. There was only a slight decline in the rate of participation by overseas visitors. In the domestic market, however, the participation rate declined by about 10 percentage points in respect of all States, except Queensland where it remained constant.

It is tempting to attribute the lower participation rate of Australian visitors to the large proportion travelling on business and for other personal reasons. However, it should be noted that the number of mainland holiday visitors increased by 24% between 1993 and

1998-99, while the number participating in nature-based tourism remained reasonably unchanged.



Age and Sex

Women account for half the number of adult visitors to the State, but a little more than half of those engaging in nature-based tourism. They appear to be more interested than men in visiting natural areas and undertaking outdoor activities.

Participants	Proportions 1998-99 (%)			participation rate(%)		
	Male	Female	Total	Male	Female	Total
15-19 years	2	3	3	69	83	77
20-24 years	6	8	7	74	74	74
25-29 years	9	11	11	64	71	68
30-34 years	10	9	10	68	74	71
35-39 years	8	8	8	55	70	62
40-44 years	10	10	10	58	67	62
45-49 years	10	11	11	60	76	68
50-54 years	14	14	14	65	72	68
55-59 years	11	10	10	71	74	72
60-64 years	10	8	9	79	74	76
65 years & over	10	9	10	67	71	69
Totals	164,500	196,500	361,000	65	72	69
Percent	46	54	100			

Mode and port of departure

The 1993 data appeared to indicate that the best means of promoting ecotourism and adventure-style holiday travel was through tour packages combining air transport into Hobart and Launceston. However, the incremental capacity provided by the “Spirit of Tasmania”, following termination of the George Town - Port Welshpool catamaran service in May 1993, also appeared to offer an opportunity for promoting this style of holiday.

Port of Departure	Air	Spirit of Tas	Devil Cat	Totals	Percent
Hobart	142,100	..	..	142,100	39
Launceston	99,600	..	..	99,600	28
Devonport	13,900	80,900	..	94,800	26
Wynyard	6,900	..	..	6,900	2
George Town	..	..	17,600	17,600	5
Totals	262,500	80,900	17,600	361,000	100
Percent	73	22	5	100	

The majority of visitors continue to travel by air, but the proportion has eased from 80% in 1993. The Devil Cat and the previous Seacat ferry services are not directly comparable since neither operated for a full year. The number of visitors travelling on the “Spirit of Tasmania” increased by more than 30,000 over 1993, raising the ferry’s share of the total by six percentage points.

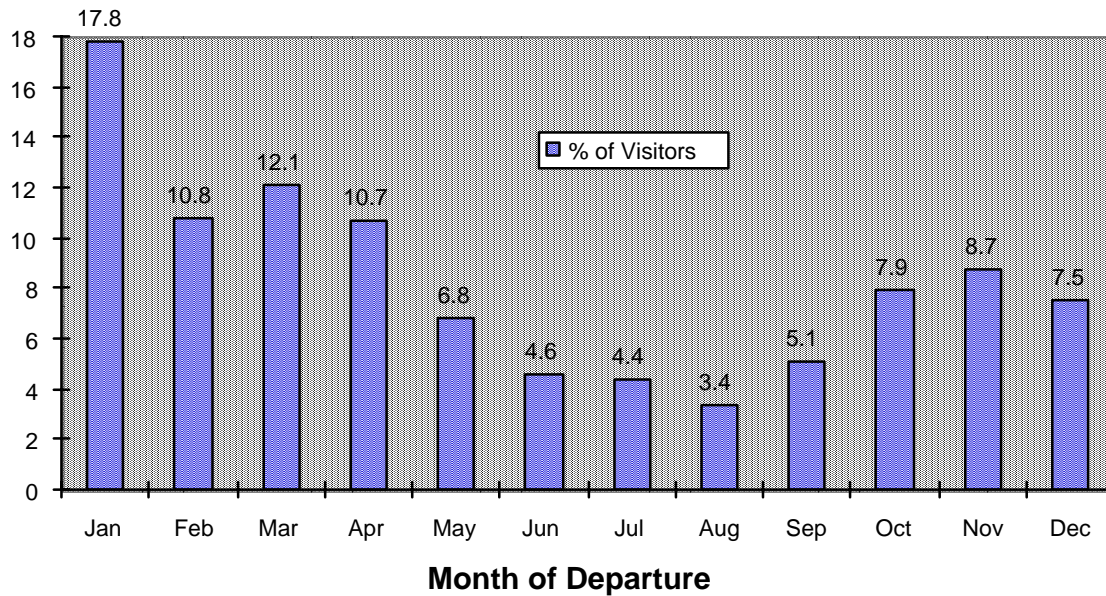
Nature-based tourism does seem to have an affinity with the “Spirit of Tasmania”. The answer may lie partly with market response to the images associated with TT-Line promotion of the “Spirit of Tasmania” during the intervening period, and partly with customer reaction to brochures and other display materials on board the ferry featuring Tasmania’s natural areas.

Another possible explanation is that the practice instigated about five years ago, of placing a National Parks ranger on board the ferry during the summer months to inform passengers about Tasmania’s natural areas, has had an influence on where visitors go and what they do during the peak holiday period.

Seasonality in Nature-based Tourism

Not surprisingly, summer is the most popular time for ecotourism and adventure-style tourism, more than half the nature-based tourists travelling between January and March.

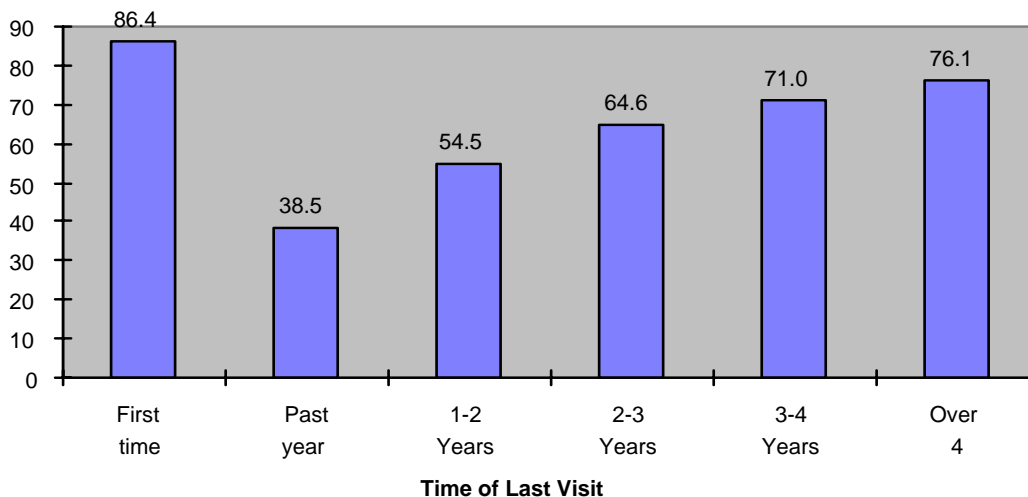
Seasonality in Nature-based Tourism



First-time and repeat visitors

In 1998-99, just over 86% of first-time visitors to the State engaged in nature-based tourism, similar to 1993. This indicates the importance of the natural environment as an element in Tasmania's image and a major factor in the State's appeal as a tourist destination. In comparison, the participation rate among repeat visitors was only 58%. Interestingly, the longer it was since they last visited the State, the more they were inclined to visit natural areas or participate in outdoor activities.

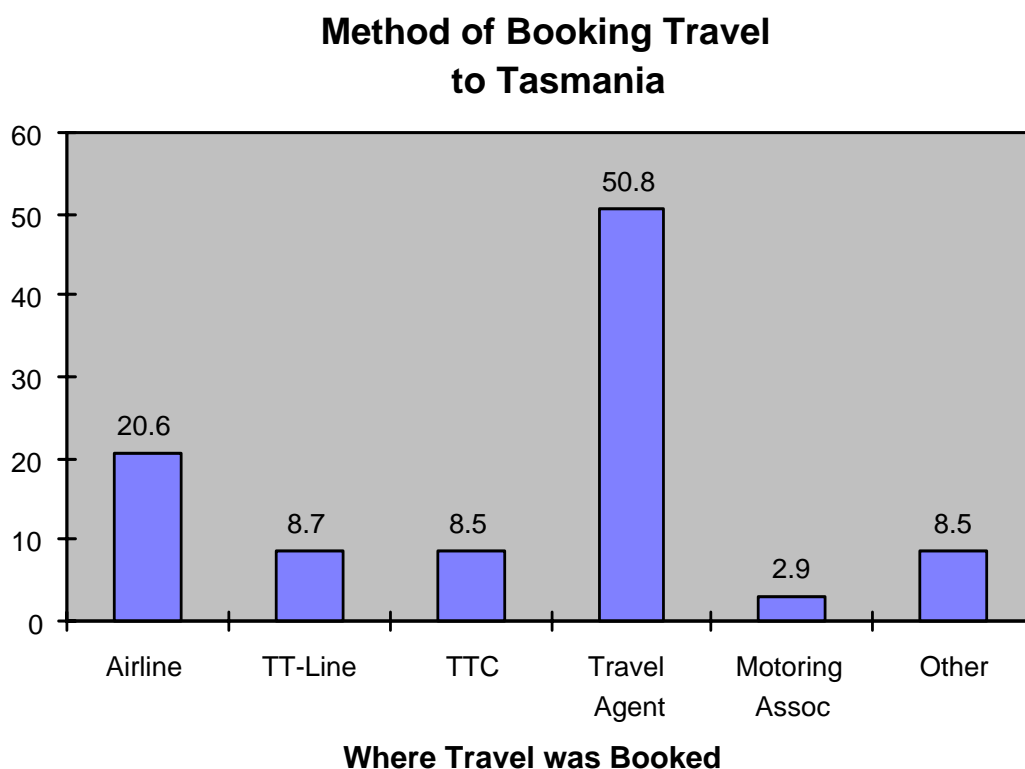
Proportion of Visitors Participating in Nature-based Tourism according to the Time of their Last Visit



Intention to Return

Although Tasmania's natural environment appears to attract visitors to the State, it is not clear that the nature-based tourism experience motivates them to return for another visit. Only 50 percent indicated an intention to return, compared with 73 percent of those who did not participate in nature-based tourism. However, the latter group will include a good number of business people and those visiting friends or relatives, who either lack the time and inclination to visit natural areas or have visited them on a previous occasion, and who are also regular travellers to the State.

Method of booking transport

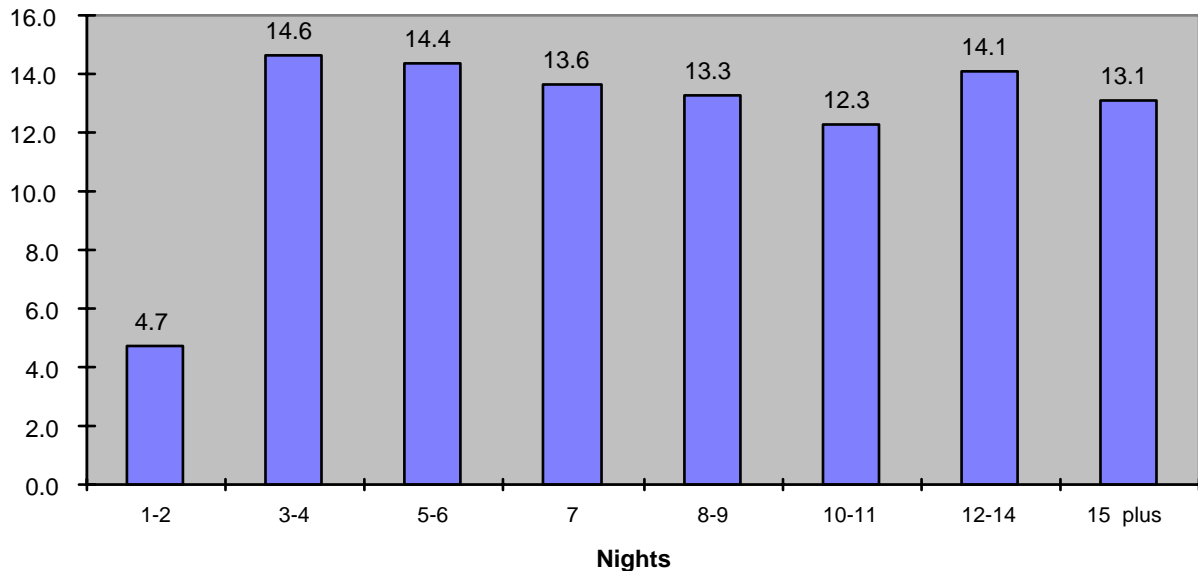


More than half the visitors made their bookings through a travel agent, which may also be where they get much of their information on the State prior to their trip. Airline offices, TT-Line and Tasmanian Travel Centres are used less often for booking travel.

Nights spent in Tasmania

Most nature-based tourists stay up to a week (47%) or between one and two weeks (40%). They rarely spend less than three nights in the State. In total they spent 3.9 million nights in Tasmania. Their average length of stay was 10.8 nights, compared with 10.5 nights in 1993. This is longer than the average of 9.5 nights for all adult visitors to the state.

Length of Stay in Tasmania



Size of travel party

Size of visitor's party	Visitors	Percent	% of all visitors in each size category
A single person	57,800	16	41
A couple	195,000	54	79
Group of three	30,400	8	76
Group of four	39,700	11	82
More than four	38,100	11	77
Totals	361,000	100	69

Only 41% of all single travellers engaged in nature-based tourism, substantially lower than the 59% in 1993. This contrasts with 79% of those travelling with companions. Over half of those participating in nature-based tourism were accompanied by one other person.

Purpose of visit

The majority of participants in nature-based tourism were visiting Tasmania primarily for a holiday or to visit friends or relatives.

Main purpose	Visitors	Percent	% of all visitors in each purpose group
Leisure/holiday	245,900	68.1	90
Visit friends/relatives	59,000	16.3	50
Honeymoon	11,100	3.1	94
Sporting event	6,000	1.7	65
Major event/festival	3,300	0.9	53
School/college tour	2,600	0.7	84
Business/employment	17,500	4.8	26
Conference, etc	12,100	3.4	44
Other Reason	3,500	1.0	44
Totals	361,000	100	69

A very high proportion (on average 90%) of all holiday makers and honeymooners enjoyed nature-based tourism. Those on a school or college trip also had a high rate of participation in nature-based tourism.

Main transport used in Tasmania

The majority of ecotourists and adventure-type tourists travelled around Tasmania by rental vehicle.

Main form of transport	Visitors	Percent	Percent in 1993
Rental vehicle	172,300	48	42
Own vehicle	78,100	22	15
Friend's or relative's vehicle	54,100	15	23
Tour coach	28,900	8	8
Public transport	14,800	4	7
Walking or hitch-hiking	8,100	2	3
Other transport	4,600	1	2
Totals	361,000	100	100

The increased use of a rental vehicle and the visitor's own vehicle, and the decline in the use of a friend's or relative's vehicle, are consistent with growth both in the number of holiday-makers and in traffic on the "Spirit of Tasmania". However, fluctuations in the balance between holiday and VFR traffic have been seen in the past, and the current swing towards holiday traffic may well be reversed.

Nights spent in accommodation

The growth in holiday visitors is reflected in increased patronage of the less popular styles of commercial accommodation and a decrease in the use of private accommodation. The proportion of nights spent in a hotel or motel was unchanged from 1993.

Type of Accommodation	Nights	Percent	% in 1993
Friend's or relative's house	1,096,000	28	36
Hotel or motel	1,125,400	29	29
Guest-house/B&B	314,100	8	4
Holiday unit	413,200	11	8
Youth/Backpacker hostel	171,500	4	3
Caravan park	465,500	12	10
Tent or cabin on public land	173,000	4	5
Other accommodation	139,300	4	5
Totals	3,898,000	100	100

Of the total, 168,000 nights or 4.3% were spent in a wilderness cabin or lodge, similar to 1993.

Market Segments

It might be expected that nature-based tourism would appeal to particular market segments and that this would be reflected in the estimates of those participating in this activity. This is not the case, the proportions are very similar to those for all visitors.

RMRC Values Segment®	Visitors	Percent	% change from 1993
Basic Needs	725	0	9
Fairer Deal	3,130	1	-43
Traditional Family Life	57,720	16	8
Conventional Family Life	17,400	5	-22
Look At Me	16,300	5	2
Something Better	24,075	7	-19
Real Conservatism	11,560	3	56
Young Optimism	27,600	8	3
Visible Achievement	109,500	30	8
Socially Aware	92,990	26	55
Totals	361,000	100	12

© Roy Morgan Research Centre Values Segments, developed in conjunction with Colin Benjamin of The Horizons Network.

N.B. The above estimates have been adjusted for non-response to the segments supplementary questionnaire.

The most notable change since 1993 is the major increase in the number of Socially Aware, who now comprise 26% of all adult visitors to Tasmania. Most other segments have declined slightly as a proportion of the total.

In 1993, just over 60,000 Socially Aware participated in nature-based tourism, close to 19% of the total. By 1998-99, the number had risen by almost 33,000 or 55%, to more than 25% of the total.

Just over 100,000 Visible Achievers participated in nature-based tourism in 1993, 31% of the total. The number rose by almost 8,000 or 8% to 1998-99, when Visible Achievers accounted for 30% of the total. For the time being, this remains the largest segment and its growth rate is well above the average of all those engaging in nature-based tourism.

Expenditure by nature-based tourists

Expenditure within the State by nature-based tourists was substantially above-average, both per visitor and per night, unlike 1993 when it was very close to the average.

Expenditure category	Est. Expenditure	Percent	\$/visitor	\$/night
Accommodation	\$165,140,000	36	457	45.00
Transport	\$90,040,000	20	249	24.50
Other personal	\$201,240,000	44	557	55.00
Totals	\$456,420,000	100	1,264	124.50

The proportionate split-up of expenditure on accommodation, transport and other personal items did not differ significantly from 1993 or from that of all adult visitors in 1998-99. However, spending per visitor was 20% above the average for all visitors in 1998-99, while expenditure per night was 12.5% above average, those engaged in nature-based tourism staying slightly longer in the State.

Regions visited

On the whole, nature-based tourists travelled more widely around the State than in 1993, staying overnight in more regions during their trip, but spending slightly less time in each. Their average stay in the State was virtually unchanged.

Region	Visitors	Percent	Percent in 1993	% Increase
Greater Hobart	299,700	84	79	18
Southern	129,100	36	28	45
East Coast	171,500	48	37	45
Greater Launceston	214,000	60	57	16
Northern	63,600	18	18	13
North West	177,800	50	39	41
West Coast	150,800	42	37	27
Totals	361,000	100	100	12

NB: percentages will not sum to 100% because visitors can stay overnight in more than one region.

Compared with 1993, a higher proportion of visitors stayed overnight in most regions. The increase in the number of visitors to each ranged from 13% to 45%, the Southern and East Coast regions enjoying the highest growth.

Nights spent in Regions

Region	Nights	Percent	Ave. Stay	Percent in 1993	% Increase
Greater Hobart	1,476,500	38	4.9	38	16
Southern	428,100	11	3.3	8	53
East Coast	374,300	10	2.2	8	40
Greater Launceston	629,200	16	2.9	19	-2
Northern	183,600	5	2.9	4	26
North West	540,400	14	3.0	15	9
West Coast	265,800	7	1.7	8	-5
Totals	3,898,000	100	10.8	100	15

NB: the average stay in each region refers only to those visitors who stopped there overnight. They will not sum to the total, which is the average length of stay in the State.

There was a 15% increase in the total number of nights spent in Tasmania by nature-based tourists. The average stay declined in Greater Launceston (3.5 to 2.9 nights), the North West (3.9 to 3 nights) and the West Coast (2.4 to 1.7 nights). Elsewhere, there was little or no difference. Greater Hobart attracts the major share of both visitors (84%) and visitor-nights (38%).

Activities

Nature-based tourists' rate of participation in entertainment and cultural activities has generally increased since 1993, the main exception being visits to casinos. The number visiting wineries recorded the highest growth, increasing by two-thirds.

Activity	Visitors	Percent	Percent in 1993	% Increase
<i>Entertainment:-</i>				
Visiting casinos	106,300	29	34	-3
Attending theatre/performing arts	24,400	7	6	33
<i>Cultural activities:-</i>				
Visiting historic homes	186,400	52	n. a.	n. a.
Browsing at markets	208,900	58	53	21
Visiting gardens	144,900	40	38	18
Visiting antique shops	158,100	44	39	25
Visiting wineries	75,600	21	14	65
All nature-based tourists	361,000	100		

Interest in Tasmania's casinos has steadily declined during the past 20 years, the proportion of all adult visitors choosing to visit either or both casinos (at Hobart and Launceston) dropping from over 50% in 1978 to about 29% at present. This most probably follows from the proliferation of casinos in the mainland States. Since 1993, the number of nature-based tourists visiting a Tasmanian casino has followed this trend, declining by three percent.

There is strong interest in cultural activities, indicated by an increasing number (and proportion) visiting markets, gardens, antique shops, wineries and attending a theatre or the performing arts.

Activity	Visitors	Percent	Percent in 1993	% Increase
<i>Recreational activities:-</i>				
Bush-walking	253,700	70	59	11
Wildlife viewing	173,700	48	n. a.	n. a.
Boating/sailing	53,700	15	7	5
Scenic flights in light aircraft	18,100	5	5	-5
Trout angling	17,400	5	4	-4
4WD/recreational vehicle	17,100	5	5	-20
Recreational sea fishing	15,000	4	n. a.	n. a.
Cycling/mountain-bike riding	9,400	3	n. a.	n. a.
Horse-riding	7,700	2	n. a.	n. a.
Canoeing/sea kayaking	6,900	2	2	45
Scuba diving	3,300	1	n. a.	n. a.
All nature-based tourists	361,000	100		

Overall, the rate of participation in outdoor activities is high, the most popular activities being bushwalking and viewing wildlife. Large variations in the rate of participation in other outdoor activities can be expected to occur by chance, arising from sampling error.

Bushwalking by nature-based tourists

An estimated 70 percent of nature-based tourists went bushwalking in 1998-99. This substantial growth since 1993 was fuelled by a dramatic increase in those undertaking longer day-walks.

Bushwalking:-	1993		1998-99		
	Visitors	Percent	Visitors	Percent	% Change
Under 2 hours	138,620	43	145,520	40	5
2 hours to a full day	65,620	20	115,670	32	76
Overnight walk	13,160	4	18,220	5	38
All bushwalkers	189,800	59	253,700	70	34
Did not go bushwalking	133,200	41	107,300	30	-19
Totals	323,000	100	361,000	100	12

NB: numbers and proportions do not sum to the bushwalking totals, because some visitors went on more than one kind of walk.

The total number of bushwalkers rose by a third, the main increase was in those going on longer day-walks. This is supported by growth in bushwalking involving an overnight stay, though the proportion of all bushwalkers participating in this type of walk remains under 10%. It suggests that guided walking tours may be growing in popularity; 28% of overnight bushwalkers stayed at Cradle Mountain, 14% at Lake St Clair and 19% at Freycinet National Park.

All possible combinations of the three categories of bushwalking are set out in the following table. It shows that the number of visitors who went bushwalking for between 2 hours and a full day **only**, *without* going on any short or overnight walks, more than doubled since 1993 and accounted for most of the growth in bushwalking activity.

Bushwalking:-	1993		1998-99		
	Visitors	Percent	Visitors	Percent	% Change
Under 2 hours only	114,190	60	124,200	49	9
2 hours to a full day only	40,590	21	92,320	36	127
Overnight walk only	9,770	5	13,570	5	39
Under 2 hours & up to a full day	21,880	12	18,920	7	-14
Under 2 hours & overnight	230	..	220	..	-9
2 hours to a full day & overnight	830	..	2,240	1	168
All three	2,310	1	2,200	1	-5
Total	189,800	100	253,700	100	34

Looking at the more serious bushwalkers (those bushwalking from two hours to a full day or with an overnight stay), there are two distinct groups - those aged around their late 20s and those aged around their early 50s. Perhaps participation by those in the intervening age groups is constrained by family responsibilities. The proportion of men aged 55 years and over was above average, as was the proportion of women aged between 45 and 54 years.

Serious Walkers - Age & Sex



Natural areas visited

The majority of natural areas attracted more nature-based tourists than in 1993, several areas experiencing very significant increases.

National Parks and WHA	Visitors	Percent	Percent in 1993	% Growth
Cradle Mountain	156,315	43	37	30
Freycinet	109,440	30	20	74
Gordon River	101,480	28	30	6
Lake St Clair	93,245	26	23	27
Mt Field	75,640	21	17	39
Lake Pedder	27,240	8	7	24
Hartz Mountains	21,045	6	6	15
Douglas-Apsley	19,240	5	3	100
South West (Melaleuca/Pt Davey)	9,495	3	2	55
Totals	361,000		323,000	12

Cradle Mountain consistently attracted around 29% of all adult visitors between 1993 and 1997, rising to 41% in 1998-99. The number of visitors to Douglas-Apsley National Park

more than doubled over that period, although it started from a low visitor base and growth is likely ease.

The Gordon River suffered a drop in patronage, declining steadily from 23% of all adult visitors in 1993 to 19% in 1998-99.

While Lake Pedder and the Hartz Mountains both experienced an increase in visitors, in each case it was below the rate of growth in the total number of nature-based tourists. Since 1981, when the use of natural areas was first surveyed, the number of visitors to the Hartz Mountains has more than doubled, but the number visiting Lake Pedder has halved. Although both areas are well worth visiting for their natural attractions, other areas have become relatively more popular, possibly due to on-going investment in infrastructure and marketing activities.

The success story is Freycinet National Park. From 15% of all visitors in 1993, patronage has steadily improved to reach 21% in 1998-99, the number of visitors rising by almost 75%. The growth has been in both day-visitors and those staying overnight in the area (see below) and must be attributable to the development of accommodation facilities and associated tourist services (notably, overnight walking tours). As a result, Freycinet has moved ahead of the Gordon River and Lake St Clair to become the second most popular National Park destination after Cradle Mountain.

Reserves and other Natural Areas	Visitors	Percent	Percent in 1993	% Change
Cataract Gorge	173,185	48	49	9.8
Mt Wellington	146,650	41	41	10.7
Marakoopa/King Solomons Caves	37,835	11	11	10.6
Central Plateau/Great Lake area	35,740	10	13	-12.7
Hastings Caves	30,420	8	8	12.3
Abel Tasman Forest Reserve ¹	26,180	7	3	165.4
Bruny Island	25,690	7	5	57.4
Liffey Falls	22,415	6	6	13.8
Teepookana/King R Forest Drive	21,955	6	n. a.	n. a.
Dip Falls/Big Tree	21,035	6	n. a.	n. a.
Wielangta Forest Drive	15,950	4	n. a.	n. a.
Arve Rd Forest Drive	14,270	4	n. a.	n. a.
Pieman River/Corinna	13,810	4	n. a.	n. a.
Totals	361,000		323,000	12

¹ In 1993, this area was referred to as Fortescue Forest Reserve.

Although the number of nature-based tourists has increased by 12% since 1993, some areas have fared better than others and no clear pattern is evident. Again, the reasons may be related to the provision or improvement of infrastructure and services.

Mt Wellington remains a major icon among tourist attractions, visited by around 27% of all visitors and 40% of those engaging in nature-based tourism. However, numbers have only risen by 3% over the past five years.

Cataract Gorge is even more popular, being visited by 33% of all adult visitors and 48% of those engaging in nature-based tourism. This can be attributed to its proximity to Launceston city centre, its attractive and sheltered environs, and the range of facilities available for visitors at The Basin.

Fortescue Forest Reserve was renamed Abel Tasman Forest Reserve in 1994-95. Road access and publicity were improved and visitor numbers rose sharply. They remained stable around 23,000 from 1995 to 1997, and improved in 1998-99. From July 1999, the reserve was incorporated in the newly proclaimed Tasman National Park.

Bruny Island and Liffey Falls have enjoyed above-average growth in visitors since 1993, but the Central Plateau/Great Lake area has seen visitor numbers decline.

For a limited number of natural areas, information was obtained in 1993 and 1998-99 on day-visitors to each and the number staying overnight.

Natural area	Day Visit		Overnight		Total visitors		Difference	
	1993	1998-99	1993	1998-99	1993	1998-99	No.	%
Cradle Mt	68,610	105,160	51,865	51,155	120,475	156,315	35,840	30
Freycinet	46,720	87,170	16,340	22,270	63,060	109,440	46,380	74
Lake St Clair	60,280	83,070	13,415	10,175	73,695	93,245	19,550	27
Mt Field	46,900	69,370	7,690	6,270	54,590	75,640	21,050	39
Bruny Island	11,725	17,900	4,600	7,790	16,325	25,690	9,365	57
Central Plateau	35,825	31,990	5,135	3,750	40,960	35,740	-5,220	-13

Freycinet National Park recorded the greatest increase, both in day-visitors (up 87%) and in those staying overnight (up 36%). This reflects the substantial up-grading of Freycinet Lodge, and perhaps the development of backpacker accommodation in the area, plus an increase in the number of operators offering tours on the Freycinet Peninsula.

Cradle Mountain also recorded a substantial increase in day-visitors (up 53%), but the number staying overnight remained static. Since 1993, tourist accommodation has been augmented only by the provision of hostel accommodation (48 guests) and holiday cabins (an additional 38 guests). There was no appreciable difference in the number of operators offering walking tours in the area, though other facilities have been improved.

Both Lake St Clair and Mt Field recorded increases in day-visitors (38% and 48% respectively) but decreases in overnight visitors (24% and 19%).

Bruny Island enjoyed a growth of 53% in day-visitors and 69% in overnight visitors. In contrast, both day and overnight visitors to the Central Plateau/Great Lake area fell.

Duration of day-visit to natural areas

In 1998-99, day-visitors to selected natural areas were asked to indicate whether they had visited for less than an hour, or for an hour or longer.

Natural area	Up to 1 hour	%	1 hour plus	%	Totals	%
Cradle Mountain	15,740	15	89,420	85	105,160	29
Gordon River	8,595	8	92,885	92	101,480	28
Freycinet	8,570	10	78,600	90	87,170	24
Lake St Clair	29,515	36	53,555	64	83,070	23
Mount Field	17,015	25	52,360	75	69,370	19
Central Plateau/Great Lake area	9,975	31	22,015	69	31,990	9
Lake Pedder	6,120	22	21,120	78	27,240	8
Abel Tasman Forest Reserve	5,385	23	17,680	77	23,065	6
Liffey Falls	6,965	31	15,455	69	22,415	6
Teepookana/King R Forest Drive	6,915	31	15,040	69	21,955	6
Hartz Mountains	4,430	21	16,615	79	21,045	6
Dip Falls/Big Tree	8,240	39	12,790	61	21,035	6
Douglas-Apsley	8,430	44	10,805	56	19,240	5
Bruny Island	1,170	7	16,130	93	17,900	5
Wielangta Forest Drive	4,500	28	11,450	72	15,950	4
Arve Road Forest Drive	3,705	26	10,565	74	14,270	4
Pieman/Corinna	6,715	49	7,095	51	13,810	4
Port Davey/Melaleuca Inlet	2,165	23	7,330	77	9,495	3
All Nature-based Tourists					361,000	

The most popular places for day-visits were Cradle Mountain, Lake St Clair, Gordon River, Mt Field and Freycinet. The other natural areas attracted less than 10% of all nature-based tourists.

Generally speaking, visitors tended to stay an hour or longer in those places where there was a lot to see or do (eg Bruny Island), or where the main feature was some distance from the point of arrival, such as Wineglass Bay Lookout on Freycinet Peninsula. This fails to explain why, having driven to Lake St Clair, such a high proportion of those who visited (36%) spent less than an hour there. This was so, whether they were on a coach tour, driving a rental vehicle or their own car, while those using a friend's or relative's car tended to stay longer. 7% of visitors to Bruny Island said they returned on the ferry within the hour of arriving on the island.