



# Nature Based Tourism in Australia Manifesto

## **COVER NOTE**

This draft Manifesto has been crafted through consultation with State and Federal Governments; tourism and parks agencies; the investment community; Australia's leading tourism operators; known industry experts and Ecotourism Australia's members.

This process began in November 2015 as a key legacy project of the National Landscapes Program (ceased 30 April, 2016).

A workshop was co-hosted by ARTN and EA on 15 March 2017 to further develop the Manifesto. Attendees include TTF, Austrade, TA, QTIC, Parks Australia, NSW NPWS, Parks Victoria, DEWNR SA, TAPAF Chair, Tourism and Events Queensland, Leading Tourism Operators.

Over the coming month, the Action Plan will be completed by key drivers of Australia's Nature Based Tourism Industry.

## SECTION ONE:

### Vision

Australia realizes the potential of Nature-based tourism to make a major contribution to the development of more diverse, sustainable and resilient regions.

This Manifesto will assist our whole industry better build Australia's visitor economy by:

- Delivering on the marketing promise
- Building Destination Australia
- Embracing Innovation

### Context

Tourism in Australia is experiencing strong momentum with an ever-increasing number of international arrivals. In the year ending December 2016, overall international tourism achieved very strong growth. Expenditure increased 7% to \$39.1 billion with number of visitors increasing 11% to 7.6 million.

Now is the time to invest.

The Nature-based tourism (NBT) industry is currently experiencing positive and sustainable growth in some regions - increasing 4% per annum since 2010. 2015 saw significant growth in the number of international visitors to state and national parks (13% growth from 2014).

The potential of NBT growth is yet to be fully realised. Globally, immersive experiences in nature are one of the fastest growth areas and Australia needs to continue to focus on tourism products and experiences that appeal to both international and domestic travellers, rather than relying on passive viewing of nature.

Additionally, whilst the industry is strong, only select regions are receiving the benefits. This can be attributed to NBT not being executed properly – reflected in Australia dropping from its global position #1 to #9.<sup>i</sup>

Regional Australia is suffering from declining resource sector jobs and investment, a dwindling revenue base and demographic shifts as people move to seek employment opportunities in cities. The Nature-based tourism industry can assist regions to grow sustainable employment, resilient economies and incentives for growth.

### The Gap

Better results can be achieved. There is currently no collaborative, nation-wide approach to maximize and realize the potential for NBT (create more jobs, boost regional economies, achieve better conservation outcomes) – this document frames a new stronger approach that brings key stakeholders together to around priority work areas, to better leverage existing work and identify new actions that build on previous successes, lessons and learnings.

**DEFINITION OF NATURE-BASED TOURISM:** Nature-based tourism is leisure travel undertaken largely or solely for the purpose of enjoying natural attractions and engaging in a variety of nature-based activities – from scuba diving and bushwalking to simply going to the beach (Tourism Australia, 2017).

## SECTION TWO:

### Why Nature-based tourism is part of the solution

Nature-based tourism is significant

- In the year ending June 2016, 68 per cent (or 5.0 million) of international visitors engaged in some form of nature-based activity.
- The top international nature-based markets were China (17 per cent), the United Kingdom (11 per cent), New Zealand (10 per cent) and the USA (9 per cent).
- International nature-based visitors tend to be younger than other visitors with 33 per cent being aged 15-29 years.

#### 1. It can drive regional economies and job creation

TRA has stated that when including directly and indirectly employed in tourism related industries the number nearly doubles to 925,000 (or 8.1% of Australia's total labour force). They go on to say that they expect a further 123,000 jobs in tourism to be created by 2020 (a growth of 23%).

#### 2. Nature-based visitors generate higher yield on average, spending more and staying longer.

On average, international nature-based visitors spend \$5,548 per trip compared to \$3,621 per trip by other international visitors (those who did not undertake nature-based activities).

#### 3. It is an important motivator for international visitors to travel to Australia

Tourism Research Australia (TRA) has identified 69% of International and 28% of overnight Domestic Tourists are Nature-based Tourists (TRA Nov 2015).

#### 4. Nature-based tourism is growing

In 2014, there were 4.2 million international nature-based visitors to Australia, an increase of 4% per annum since 2010 (Griffith University, 2014).

#### 5. NBT provides the most memorable experience

International leisure visitors consistently cite "Australia's natural environment and wildlife" as the most memorable experience they had on their visit to Australia (Griffith University, 2014).

#### 6. NBT is becoming more important to Chinese visitors

Though emerging Asian markets still lag traditional markets on propensity, 77% of visitors from China now participate in nature-based activities, exhibiting stronger preferences for botanical gardens (63% vs 55% overall) and whale/dolphin watching (19% vs 14%). Nature-based experiences are a major draw-card for Chinese visitors. Exceeding expectations for nature-based experiences improves the likelihood of a positive travel experience (TTF, 2014).

#### 7. The forecast is positive – potential for growth

Nature-based tourism outperformed the overall tourism market on all fronts in 2012 – 13 (TTF, 2014). By 2024–25, total tourism expenditure will reach \$145 billion in real terms (TRA, 2015).

- **Realising the potential**

*This section will discuss the need to fast track product development, focus on innovation and quality, and discuss what is required for a globally competitive nature-based tourism industry*

Globally NBT is increasingly competitive and for long term growth we must deliver on the promise, focus on quality, depth and diversify the offering to remain a compelling destination.

- **How do we realise the potential**

Significant work has already occurred in many parts of Australia and at the state and national levels through nature-based tourism strategies, park management and visitation plans and regional destination planning that contains strong support for nature-based development. But that the capacity to create meaningful outcomes and the impact has been inconsistent across different areas and the work has not been continuous. A long-term approach is essential as growth takes time and ongoing quality improvement is not a task that can be addressed and regarded as ‘achieved’ or ‘finished’.

A focus of this Manifesto is to improve the linkages between the many different players (Federal, State, regional and local tourism organisations, parks, authorities, environmental groups and our industry etc) to create effective and mutually beneficial results. This requires leadership which is a critical element of each of the key pillars identified in Section 3 and is key to activating the Manifesto.

- **Working with others**

This Manifesto acknowledges the importance of inter-relationships within the visitor economy and across the whole economy. A successful nature-based tourism industry is vital for the growth of the broader tourism industry and of regions. Virtually all other sectors of the tourism industry such as food and wine, adventure or touring, also rely on our natural and cultural strengths. From a geographic perspective, resilient regions rely on a combination of sectors – such as resources and agriculture as well as the tourism sector.

This Manifesto aims to bring a fresh approach to the NBT industry in Australia through:

- Collaboration outside of traditional partnerships and looking at innovative ways to collaborate outside of the sector
- Thinking differently – providing the industry with national leadership and a framework that encourages nature-based tourism’s further contribution to regional development



## SECTION THREE:

### - Strategic priorities and focus areas

Developing and communicating Australia's nature-based tourism promise strategically, delivering it to global best practice standards, being a leader in new and innovative products, and maintaining Australia's international competitiveness are vital to sustain the benefits that nature-based tourism delivers. Many of Australia's nature-based products are the drawcards of regional Australia making the benefits of NBT even more critical to our future industry. Improved coordination and collaboration at, and across regional, state and national levels is essential for continued success, and this means that all elements and aspects of the industry need to work together more effectively.

We have identified three core areas for focus underpinned by, and dependent on leadership to activate and drive the Manifesto, and by research, data and metrics to inform and adjust decision-making.

#### 1. Marketing and promotion

Much of the marketing of Australia tourism is set in the natural environment or uses it as backdrop – imagery often containing uniquely Australian elements, particularly wildlife. This imagery implicitly or explicitly (depending on the product) conveys some of the product's 'promise'.

Marketing and promotion are undertaken at many levels (national, state, regional, enterprise). This activity is vital to creating awareness and showcasing excellence, but there is a need to communicate a greater depth and diversity of products and services to allow a consumer to get beyond the 'top line' and easily delve to find the offerings that best suit them. Diversity has positive elements, communicating the range of product available, but carries the risk of conflicting, diffusing or misalignment of messages. Better connection and alignment of marketing and messaging can reduce this risk, by conveying clearer, more coherent messages to consumers.

Some operators appreciate and value current campaigns but say it feels like ½ inch deep and a mile wide with not enough depth for consumers to connect to their personal interests, particularly within regions that are not focal points for these campaigns.

#### 2. Existing and new experience development and delivery

Australia's natural and cultural assets are the backdrop and underpin the character and uniqueness of virtually every form of tourism – food and wine, adventure, touring etc. A drop in quality of NBT affects almost all other parts of Australia's tourism industry.

There needs to be a much stronger focus on improving the depth, diversity and quality of NBT experiences. The strong focus on marketing (federal and state) has overshadowed the need for a continuing stream of new, improved and improving products. Encouraging more innovative and contemporary quality products of appeal to our key target markets is needed.

#### 3. Regional and destination planning and management

New product may require enabling or supporting infrastructure and travellers undertaking NBT experiences usually require a wide range of ancillary services including access, accommodation, food etc to complement their primary experience. Building a diversity and depth of experiences in a region and a regional NBT profile requires a degree of planning and coordination for consistency of brand, continuity of, or access to, new experiences. Building a critical mass of quality nature-based offerings helps increase visitor potential to visit, stay and spend. Effective regional entities are critical to developing and supporting diversity and depth of products and services at a regional scale.

The continuing attraction of the natural environment and the quality of the visitor experience depend on destinations that are well maintained. National Parks and other types of protected areas provide the setting for many nature-based experiences. Constantly declining park agency budgets create ongoing difficulties in raising the level and quality of visitor servicing and management of public lands. Inadequate investment in maintaining key visitor infrastructure undermines international competitiveness.

Despite a number of reforms at local, state and federal government levels, the regulatory environment for assessing, approving and setting conditions for new developments is complex and sometimes still sequential rather than integrated.

Underpinning these three pillars are:

#### **4. Leadership – underpins all areas of the Manifesto.**

Without leadership to drive these priorities and actions, Australia will not achieve its potential as a world leader in NBT.

Leadership operates at all levels: national, state, regional and enterprise. The first leadership step is for all levels of government, tourism industry organisations, federal, state and regional tourism agencies and organisations, operators, and the associated research community to endorse this Manifesto.

The Manifesto needs an energetic and enthusiastic champion in Federal Cabinet, champions in State Government and leadership across regional Australia.

Countries where NBT is excelling have these clear champions (one can simply point to New Zealand where the Prime Minister is also the Minister for Tourism). In Tasmania, experiencing a strong resurgence in its largely nature-based visitor economy, the Premier is also the Minister for Tourism. Western Australia has more recently adopted the same approach, acknowledging the importance of the visitor economy in that State.

To assist in delivering real leadership this Manifesto needs:

- Endorsement by all levels of government, by tourism industry organisations, tourism agencies at the federal, state and regional level, operators, and the associated research community.

- A champion in Federal Cabinet, champions in State Government and leadership regional Australia. Countries where NBT is excelling have these clear champions (such as New Zealand where the Prime Minister is also the Minister for Tourism).

## **5. Insights, data, research, metrics and evaluation**

As the fundamental driver underpinning Australia' international competitiveness, understanding our performance in this area is essential. NBT has slipped from the national research and reporting agenda. It needs to be restored, and include the data, research and capacity to dig deeper into the activities and elements needed by industry (e.g. walking, diving, mountain-biking).

<sup>1</sup> Tourism Australia Annual Report 2015/16, page 1

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