

STATE OF THE  
INDUSTRY REPORT  
ECOTOURISM IN AUSTRALIA

2019 2020

SEPTEMBER 2020



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Photo credit: Murray River Trails, SA (Advanced Ecotourism)

Photo credit (front page): Paronella Park, QLD (Advanced Ecotourism, Climate Action Business)

Ecotourism Australia Ltd.  
1A 88 Buckland Road  
Nundah QLD 4012  
07 3256 6777  
[www.ecotourism.org.au](http://www.ecotourism.org.au)  
[eco@ecotourism.org.au](mailto:eco@ecotourism.org.au)

# Executive summary

The year 2019-20 has quite possibly been the most challenging year Australia's ecotourism industry has ever faced.

The bushfires which started in August of 2019 caused devastation to huge areas of the country. Media coverage of the fires, in some cases falsely portraying the whole of Australia as being impacted, was enough to stop potential visitors in their tracks.

Before the fires, years of drought had plagued our nation's inland regions, cyclones and floods had affected other areas. Whilst as a country, we are somewhat used to dealing with the threat and occurrence of extreme weather events, these cumulative challenges were a battering for our sector, which relies on a healthy natural environment to survive and thrive.

With the onset of the COVID-19 pandemic at the beginning of 2020 and the resulting national and state border closures, restrictions on travel and new 'COVID-safe' operating requirements for businesses, some big questions arose. How much more can the industry possibly take? Are there any silver linings to all of this bad news? Where does it leave the future of our nation's nature-based tourism sector?

This report is designed to offer some insights into all of these questions. As the first report of its kind, it compiles the findings of Ecotourism Australia's first ever 'State of the Industry Survey' to its 500+ members (certified and applying operators and destinations) around Australia. It gives readers a true and honest insight into the lived experiences of one our nation's fastest growing and most in-demand sectors.

Despite all that they have faced, Australia's ecotourism operators and destinations are some of the most resilient people you will find across the whole of the tourism industry. While their businesses and livelihoods depend on the nature around them, their passion to protect it and to give back to the communities in which they operate is nothing short of inspirational. This passion shines through as resilience, courage, positivity and a willingness to push on, despite all odds, and in the face of continued trials and tribulations.

We believe ecotourism is the industry which will thrive in our new post-COVID world. We hope that this State of the Industry Report will help you to understand why.

## Key findings

In March 2020, more than 90% of ECO Certified tourism businesses closed their doors and now, seven months later, a third remain closed. Of those who are operating, many are doing so at unsustainable levels. Beyond easy driving distance from capital cities where travel is permitted, ecotourism and nature-based tourism is still on hold.

This report highlights the reality of being a regionally based ecotourism operator. You may be open but not at full capacity, you are extremely likely to be severely stressed about your own wellbeing and your business' future, you have probably had to let your skilled and experienced staff go and your cash flow has been decimated. When recovery comes, these people need to be in a position to rebuild and reactivate their businesses and themselves.

For economic recovery, Australia needs ecotourism and nature-based tourism operators to survive. Our Australian communities need to be able to easily engage with nature to provide the mental and physical health recuperation is desperately needed by many.

# Executive summary

## Recommendations

Imagine an Australia without trips to the Great Barrier Reef, guided walks through our National Parks, or tours that allow people to swim in the ocean with dolphins and whale sharks. Without increased and ongoing support, these experiences could simply disappear or become low quality and devalue the Australian brand and reputation.

To ensure these experiences are still offered when borders open and visitors return, ecotourism and nature-based businesses need:

- Ongoing JobKeeper support that includes support for a casual and seasonal workforce.
- An expanded grant system to cover fixed business costs such as insurance, rent/leases, loan payments, etc.
- Regional, state and national programs that encourage and reward quality businesses that deliver high levels of service with sustainable operations.
- The lowest levels of restrictions on travel, border crossings, overnight stays, and tour densities in each region, that still ensure the health requirements are met.
- Ongoing, coordinated and resourced business, wellbeing and mental health counselling for tourism operators to ensure small and medium business owners are ready for the recovery.
- Development of a national nature-based tourism strategy



Rod Hillman  
Chief Executive

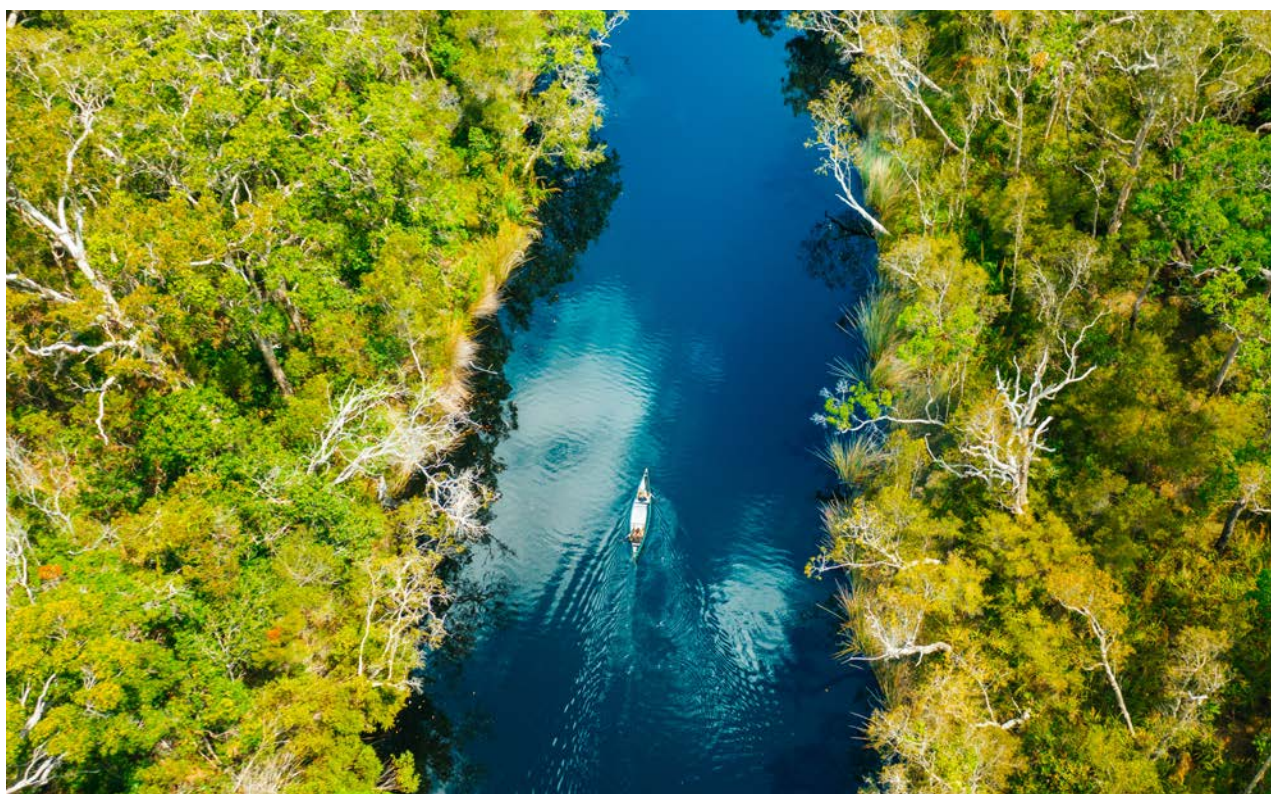


Photo credit: Everglades Eco Safaris, QLD (Advanced Ecotourism)

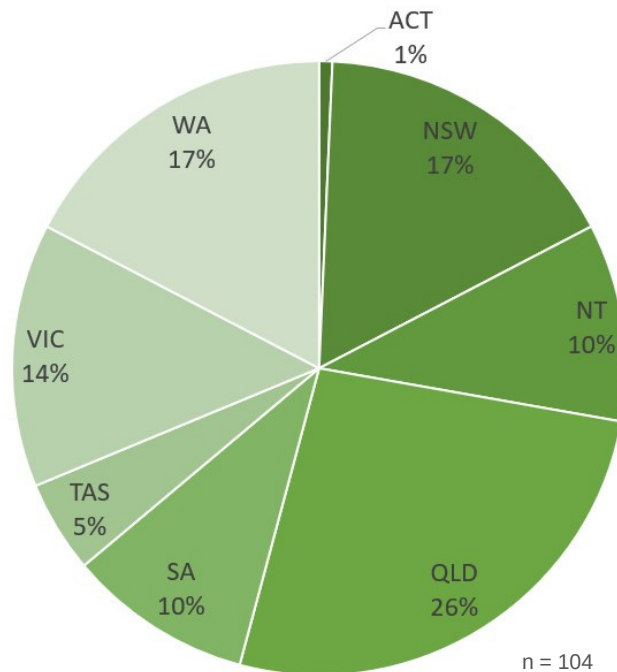
# Methodology

The Ecotourism Australia State of the Industry Report 2020 references data from an online distributed membership survey to certified and applying members of Ecotourism Australia. The data that is presented in this report is for the year 2019/20. The survey included 18 open and close questions with respondents asked to provide comments on most of the sections. The survey was distributed through Survey Monkey.

Ecotourism Australia received a total of 106 surveys, of which 104 were analysed. The analysis in this report utilised data from 87 fully completed survey responses and 17 partially complete surveys. Complete surveys corresponded to tour operators (62), accommodation providers (21) and attractions (6). Partially complete surveys corresponded to tourism operators (15) and destinations (2).

The majority of respondents were operational in Queensland (QLD), followed by New South Wales (NSW) and Western Australia (WA).

Survey respondents by State/Territory (multiple answers possible)



Data collected from the membership survey provided information about the lessons over the past 12 months, challenges faced and members' views about the year ahead. This State of the Industry Report aims to bring insights about issues Ecotourism Australia will advocate for on behalf of its members, and draws conclusions on how to continue to meet members needs as we move towards the restart of the ecotourism industry in Australia.

# Current situation

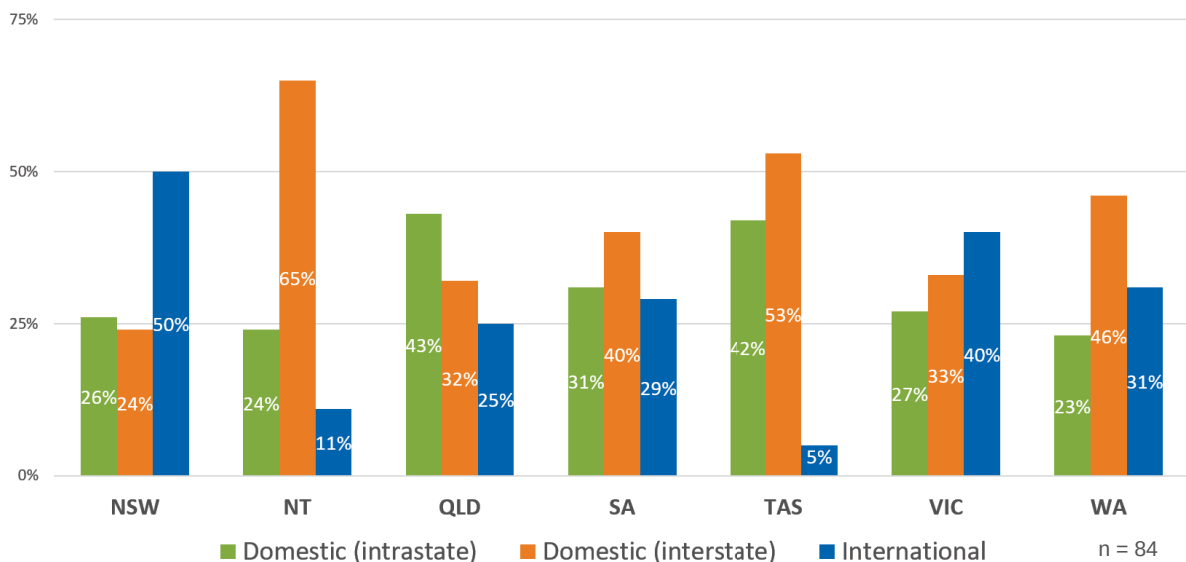
## Q1. Is your business / organisation currently operating?

Yes - fully operational	26.8%
Yes - limited services only	46.4%
No- remain closed	26.8%

As of August 2020, the majority of nature-based tourism businesses operate with limited services only.

## Q2. Percentage of domestic vs. international visitors prior to 2019/20

The distribution of international, domestic intrastate and interstate visitor varies greatly per state/territory. Across all states and territories, 36% of domestic visitors were intrastate, 33% interstate and 29% international.



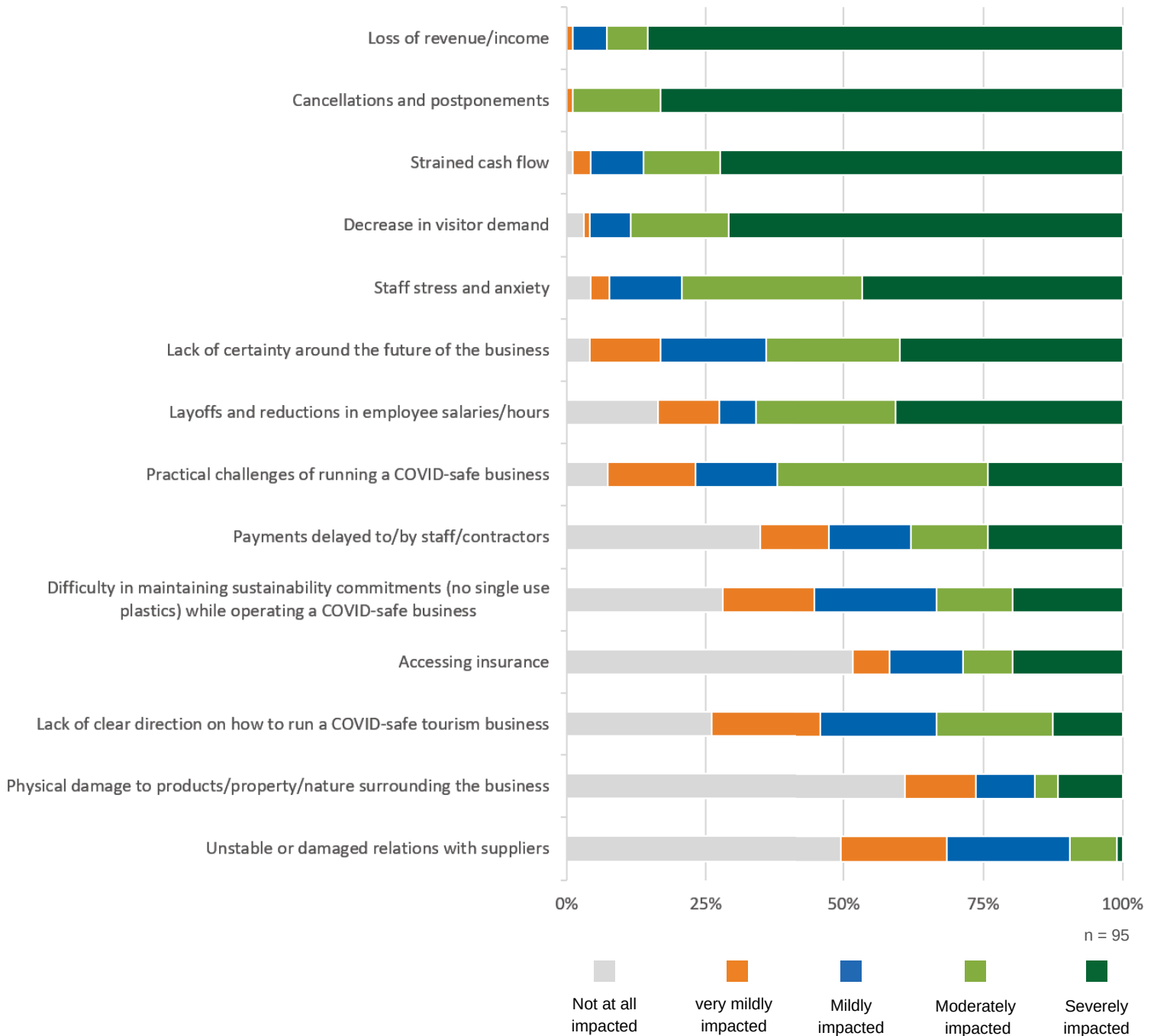
## Q3. Most important issues for nature-based tourism operators at present

68% of operators believe that the **reopening of borders** (international and state) and **ongoing financial government support** for tourism businesses (such as JobKeeper) are currently the two most important issues facing the industry.

18% think that the **elimination of COVID-19** should be the number one priority, even if it means keeping the borders closed until it is safe for people to travel again.

# Current situation

## Q4. Biggest challenges for nature-based tourism operators in the past 12 months



Most operators have been severely impacted by the loss of revenue/income (86%), cancellations and postponements (84%), and the strained cash flow (72%). Almost half of respondents indicated that stress and anxiety among staff had a major impact on their business/organisation. Two thirds of operators had to lay off staff or reduce their salary/hours.

62% have been moderately or severely impacted by the practical challenges of running a COVID-safe tourism business, whereas a third of operators found it difficult to maintain their sustainability commitments (no single use plastics, using environmentally friendly cleaning products etc).

# Current situation

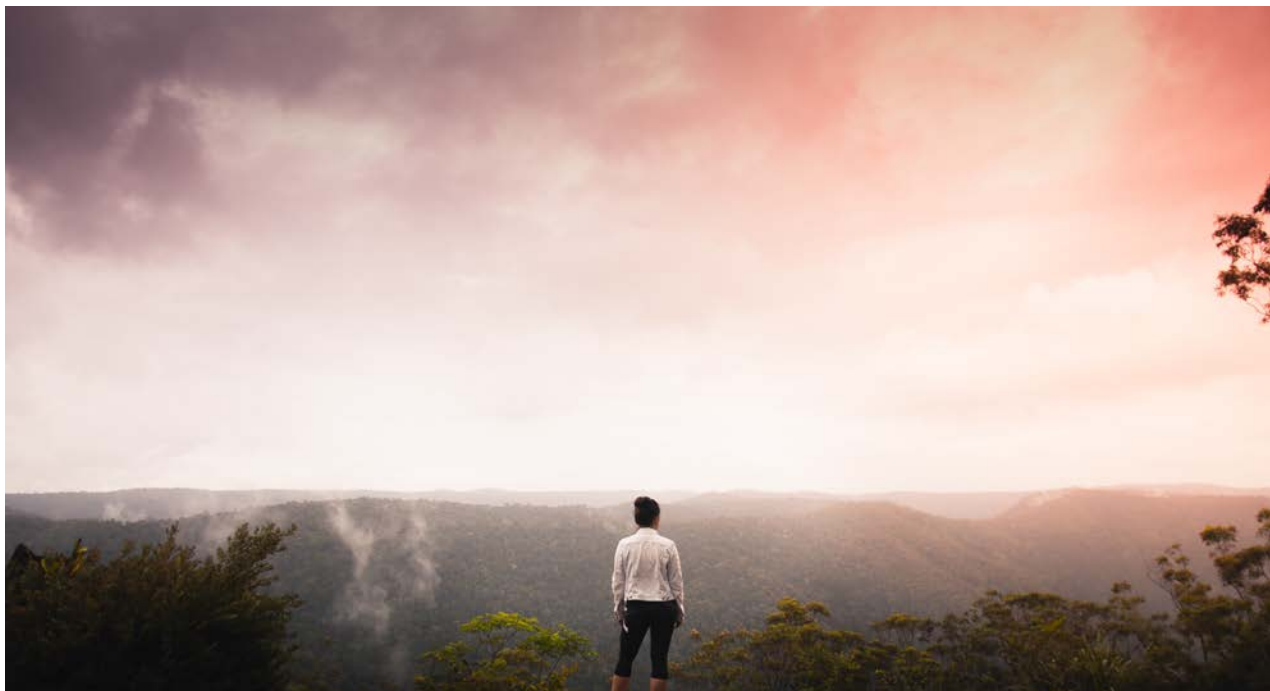


Photo credit: Binna Burra Lodge, QLD (Advanced Ecotourism)

## Q5. Positive outcomes during the challenges of 2019/20

During the challenges presented in 2019/20, the majority of members had more time to invest in other things such as upgrading their business website or refreshing their product offering. 59% of operators have reviewed and improved their operations, pursued funding or grant opportunities and used the downtime as an opportunity for self-care and time with their families.



n = 94



# Our work

## Q6. Innovations in the past 12 months

Over the past 12 months, our members have introduced several innovations and made changes to their organisations. This includes the creation of new experiences for the domestic market, designing new websites, forming new partnerships, and giving more attention to online technologies.

*"Increased contact free experiences such as the E-Bike hire."*

*"We have moved to an entirely online platform with bookings and waivers. We have decreased guest numbers who can participate on treks making the experience much more personal and COVID-ready."*

*"We are completely reinventing ourselves."*

*"New regional destinations and social media campaigns."*

*"We are working on engaging with our local indigenous community to set up guided tours with an indigenous guide."*

*"We have achieved ECO and ROC Certification."*

*"We have focused on our local area... We have seen a big increase in our business by doing so, women feel safer closer to home and are very keen to get out in nature with us."*

*"We have not compromised our commitment to our environment or the incredible animals we are blessed to interact with. We continue to fine tune our experience weekly."*

*"Promoting diverse uses of the natural environment in active adventure programs to students. Including it school curriculum and using certified operators."*

*"New eco-glamping accommodations soon to be released in 2021."*

### **Vision Walks - Eco Tours**

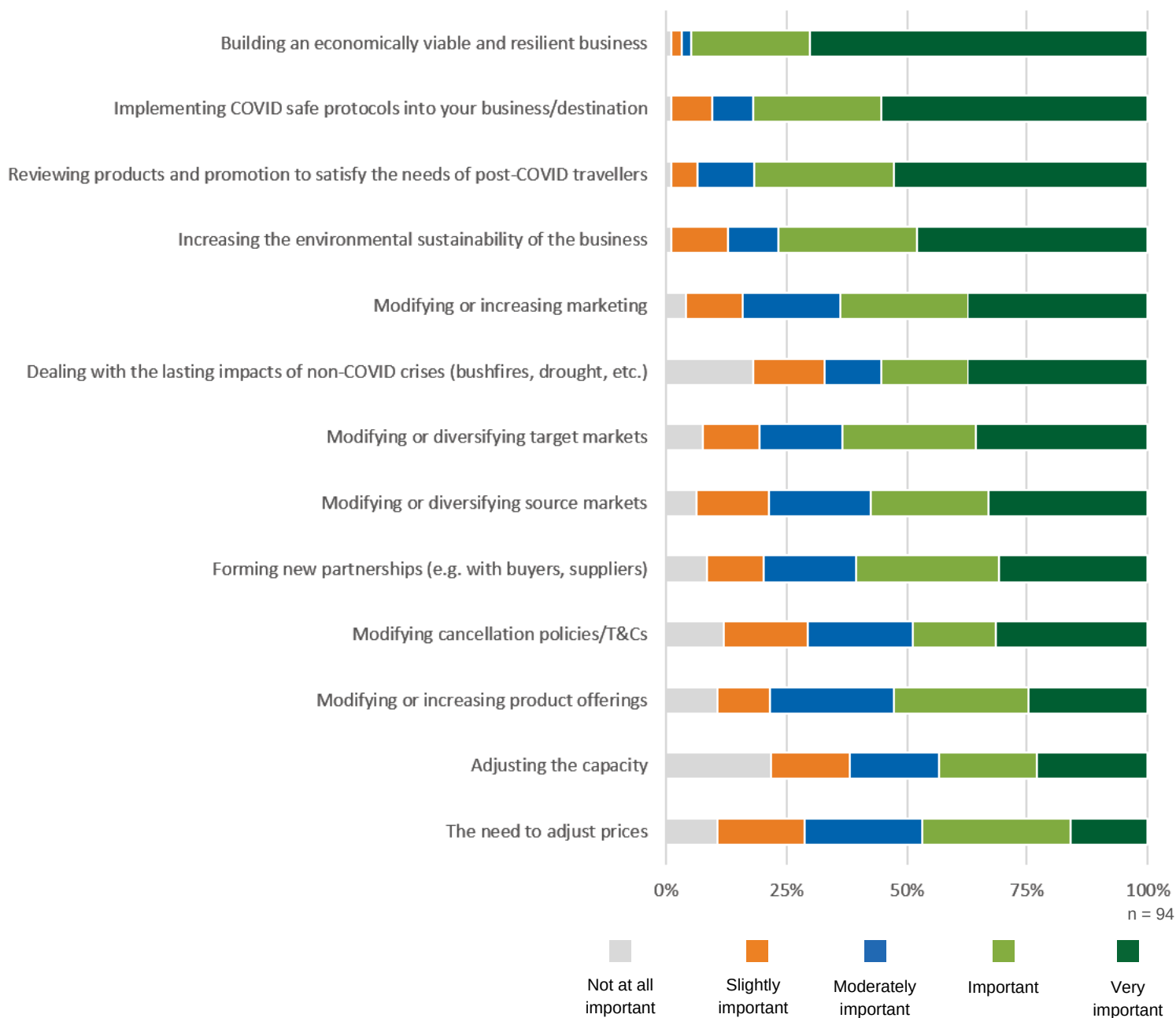
Owner Wendy Bithell used the downtime to diversify her business by launching live virtual tours to continue operating throughout the pandemic. Further improvements include the development of new bush tucker walks and the purchase of a new hybrid vehicle to reduce carbon emissions.



Photo credit: Vision Walks - Eco Tours, NSW (Advanced Ecotourism)

# Looking forward

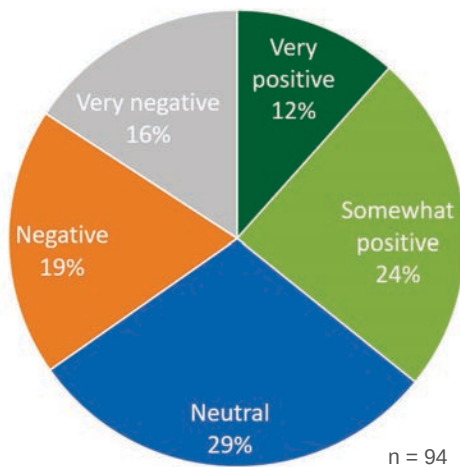
## Q7. Long-term objectives



Building an economically viable and resilient business is the most important long-term objective for nature-based tourism businesses (70%) followed by the need to implement COVID safe protocols (55%) and reviewing products and promotion to satisfy the needs of post-COVID travellers (52%). Increasing the environmental sustainability of the business/products or destination is important or very important to 77% of operators. Adjusting the capacity and prices was less important to operators.

# Looking forward

## Q8. Business prospects over the next financial year



Nearly as many tourism operators are positive about the next financial year's business prospect (36%) as they are negative (35%).

## Q9. The most important issues members want Ecotourism Australia to advocate for (in order of priority)

1. **Maintaining JobKeeper** (and similar) payments (very important for 74%)
2. **Building demand** for nature-based experiences/destinations and reassuring the market (very important for 72%)
3. Increasing **grant funding opportunities** for tourism businesses (very important for 68%)
4. **Reopening state/national borders** (very important for 45%)

## Q10. Ecotourism Australia's support to members

According to our members, we can best support their businesses/organisations through the following activities:

1. **Providing information about available grants** and recovery programs for tourism businesses (very helpful for 62%)
2. **Featuring our members on social media** or in other marketing activities (very helpful for 60%)
3. **Working with protected area management agencies** to increase rewards for certified operators (very helpful for 51%)
4. **Stronger lobbying/advocating** on behalf of our members
5. **Supporting the development of ecotourism** in your destination

# Looking forward

**Q11. The biggest lesson nature-based tourism businesses have learnt over the past 12 months that will change the way they operate in the 'new normal'**

“

Resilience & remaining positive whilst adjusting to unprecedented change.  
Clear communication with guests, easily accessible online booking systems.  
Concentrate on domestic and interstate tourism rather than relying on international tourism.  
Be flexible and adapt to rapidly changing circumstances.  
Have a financial buffer to allow for flexibility and business longevity.  
Diversification - geographically & age groups.  
Use local suppliers for sustainability benefits.  
Be willing to diversify and think outside the box.  
The value of collaboration and working across different areas of the organisation.  
Agility and innovation.  
Understanding the value and importance of modern day technology to stay connected.

”



Photo credit: Kingfisher Tours, WA (Ecotourism & ROC)

# Looking forward

## Q12. Predictions for the future

We have asked our members to predict the future waves of tourism in Australia. When will they happen? What will they look like?

### Domestic intrastate tourism

The majority of our members predict intrastate tourism to increase in the next six months. Operators believe that the dominating markets will be families, grey nomads and independent travellers.

Some members said they were unsure about what will happen to the domestic intrastate market, while others predicted it to remain constant with short stays and limited expenditure.



Gippsland High Country Tours, VIC (Advanced Ecotourism & ROC)



Wilpena Pound Resort, SA (Advanced Ecotourism, ROC)

### Domestic interstate tourism

The majority of our members predict domestic interstate tourism will increase in the next six months as soon as state borders reopen. The dominant markets are predicted to be tourists who would normally travel overseas, families and grey nomads.

### International tourism

International tourism is mostly predicted to restart in 12 - 24 months from now. This market is predicted to have the longest recovery and to start with specific countries such as New Zealand, Pacific Islands and Europe.



Pyndan Camel Tracks, NT (Nature Tourism)