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Joint Standing Committee on Northern Australia
Committee Secretariat
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Canberra ACT 2600
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RE: Submission to Inquiry into Opportunities and Methods for Stimulating the Tourism Industry in Northern Australia

Thank you for the opportunity to contribute a submission to this important inquiry.

The Nature Based Tourism Industry – realising the potential of Northern Australia

Northern Australia has a rare global position as one of the very few large natural areas remaining that have iconic sites, strong cultural connections and high quality conservation areas. It has landscapes of savanna and rainforest, rivers and wetlands that are extremely attractive to overseas travellers and is already well placed within the international market through a long and sustained promotional campaign by Tourism Australia and the Northern Territory Government.

Nature based tourism can continue to provide long term sustainable growth for Northern Australia. Nature based tourism is a major economic generator to rural and remote communities, generating greater community benefit and resilience and providing sustainable employment opportunities that can replace declining labour markets in agriculture and the resource sectors.

Many nature based tourism businesses are small to medium sized enterprises supporting regional economies and providing strong social outcomes through developing local pride, supporting festivals and events. These businesses are long term and steady members of a region's business community and actively work toward conservation of the natural areas central to their operations.

The nature based tourism industry is currently experiencing positive and sustainable growth in some regions. Nature based visitors made 48.3 million trips in the year ending June 2016 (5 million of which were international). This was an increase of 23% on the previous year.

Nature based tourism is significant

- In 2015/16, over two thirds of international visitors to Australia participate in nature based tourism (68%)
- Nature based Tourists (both international and domestic) spend more and stay 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).

- Nature based tourists spent close to \$40 billion in the year ending June 2016

Globally nature based tourism is increasingly competitive and for long term growth Northern Australia must deliver on the promise of our marketing campaigns, focus on quality/depth and diversify the offering to remain a compelling destination.

Many regions don't have the critical mass of tourism offerings – operators, products, services and infrastructure to create a compelling case to visit or to stay long enough so the benefits permeate more broadly. Survey after survey shows nature is among the most captivating attractions for international visitors – our marketing campaigns, with few exceptions, have nature as an explicit or implicit theme. It's a key part of who we are, how we live, and what we offer to visitors.

Northern Australia is abundant in natural assets with exceptional landscapes, rich biodiversity, world heritage areas and unique wildlife. There is more that can be done to realise its potential.

Key recommendations for Sustainable Tourism Growth in Northern Australia

1. Rewarding high-performing tour operators through preferential treatment by TA/STO

Northern Australia needs to promote itself by putting its best foot forward. The tourism campaigns promote Northern Australia as a premium quality destination so encouraging tour operators to function at the best of their ability, adopt best practice behaviours and constantly seek to improve their business is an obvious strategy. Tour Operators who voluntarily commit to Government and Industry driven programs that encourage these behaviours should be encouraged.

Tour Operators commit to these programs and pay the costs involved, there is no cost to Government. Implementing a meaningful reward and recognition program would have no cost to government but have a huge impact on tour operator behaviour.

Tourism Australia, State Tourism Organisations, Regional Tourism Organisations and Protected Area Agencies should give preferential listings and media opportunities to tour operators who have committed to Independently Audited Quality Assurance Programs (IAQAP), such as Ecotourism Australia's ECO certification including:

- National and State Tourism organisation provide preferential marketing and public relations opportunities to IAQAP operators.
- National and State Protected Area Managers to build stronger incentives to IAQAP operators.
- State and National Ecotourism or Nature Based Tourism Awards require entrants to hold IAQAP ecotourism certification.

Best Practice Example:

Ecotourism Australia considers the arrangement through the Great Barrier Reef Marine Park Authority's High Standards Tourism Program as best practice for recognising high-performing tour operators and providing incentives providing access to special areas and longer term permits.

The Great Barrier Reef Marine Park Authority (GBRMPA) encourages tourism operations to adopt high standards for protection, presentation and partnership within the Marine Park. These standards enhance environmental protection, reef resilience and tourism sustainability.

The GBRMPA relies on independent certification to identify high standard operations. It recognises the ECO Certification Program operated by Ecotourism Australia as a certification scheme for the Marine Park. The GBRMPA has developed benefits to both reward high standard operators and provide incentives for other operators to improve their performance. The major benefit offered by the GBRMPA is an extended permit term of 15 years for tourism program permits.

In addition, certified operators are listed on GBRMPA's website and are showcased at various trade events (for example, the Australian Tourism Exchange) and in publications.

2. Activity based marketing - creating depth in marketing rather than surface level

Much of the marketing of Northern Australia 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.

The current approach is for Tourism Australia to attract visitors to Australia and then States attract visitors to their States and then Regions to their Regions. Unfortunately, visitors have a different approach. They come to Australia to do something. And don't really care which State/Territory or Region it is physically located. They want to go scuba diving, kite surfing, bird walking, walking etc. Currently there is no direct way for the potential tourist to search by activity at the National level.

Some operators appreciate and value current campaigns but say it feels like 'half an 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.

- Improve alignment and complementarity of marketing campaigns and consistency of messages through – TA-STO-RTO collaboration
- No strategic approach will last if it lacks the information base on which to measure progress, support sound decision-making, ensure ongoing attention

to quality assurance, and benchmark international competitiveness. Additional research is required to dig deeper into the activities and elements needed by industry.

- Work with industry associations to build collaborative approaches that harness social media to effectively disseminate depth and diversity of NBT product.

3. Product Development – fostering quality sustainable tourism businesses

Tourism Australia ran successful product development programs such as the 'National Landscapes Program' and the 'Indigenous Tourism Champions Program' but they have now stepped away from product development to focus on creating demand. The State Tourism Offices have also followed this policy.

If the tourism industry is to achieve success in the increasingly competitive national and international markets, all sectors of the industry must develop quality products and services that will meet the expectations of their customers. To achieve this goal, all businesses involved in the industry must pay close attention to their business practices to ensure that the services and products offered by them are reliable, consistent and predictable. Customer confidence will be the resulting outcome, which in turn will lead to increased profitability.

The product development programs provided a clear and logical process for a new or emerging business to follow to gain access to State and/or Tourism Australia promotion. It is also a valuable tool to develop new high quality tourism product.

Ecotourism Australia advocates for a realignment in the current policy direction of many levels of government to include and strengthen tourism agencies' product and destination development functions/programs.

Ecotourism Australia members would like to see more opportunities for business management training (including financial management) as well as customer service training.

- Nature based tourism plans should be drafted and implemented to ensure strategic direction and collaboration for sustainable development of the industry. For example, we recommend implementation of the Queensland Ecotourism Plan 2016–20 and for Western Australia and Northern Territory to draft similar plans.
- There is currently no collaborative, nation-wide strategy to maximize and realize the potential for NBT (create more jobs, boost regional economies, achieve better conservation outcomes). A national framework would provide the industry with national leadership and a framework that encourages nature-based tourism's further contribution to regional development.
- Support local tourism organisations such as Savannah Way Ltd which work with small businesses to assist with tourism promotion and product development as well as regional development through research, projects, training and consultation.

Best Practice Examples:

Indigenous Tourism Champions Program

The Indigenous Tourism Champions were a selection of export ready businesses offering experiences delivered by Aboriginal people. To be included as a 'Champion,' businesses had to be nominated by their State and Territory Tourism Organisations and then meet the stringent criteria of membership. This process ensured that all Indigenous Tourism Champions were able to deliver a quality experience that meets the needs and expectations of trade and international visitors. Once approved, Champions were exclusively eligible to participate in Tourism Australia's Aboriginal tourism marketing initiatives.

National Landscapes

Australia's National Landscapes Program was a joint initiative between Tourism Australia and Parks Australia. The Program aimed to: Promote Australia's world class, high quality visitor experiences; Increase the value of tourism to regional economies; Enhance the role of protected areas in those economies and; Build support for protecting our natural and cultural assets.

The Program produced Experience Development Strategies and Landscapes Positioning Guidebooks for the 16 National Landscapes involved. The benefits to National Landscapes from the networks and partnerships developed at regional, state and national levels provided the impetus to identify new nature-based tourism business opportunities and to support the collaboration required for these tourism products. These partnerships were about finding better ways to increase awareness of conservation activities and their benefits, amongst the tourism industry and wider community

Savannah Guides

Savannah Guides is a network of professional tour guides and tour operators working with researchers, National Parks agencies and local communities. They are based in the tropical savannahs of northern Australia and operate tour guide professional development programs across the country.

ECO Certification – Ecotourism Australia

ECO certification is a product development tool that assists businesses with a nature based tourism focus ensure that their business is operating in line with triple bottom line sustainability elements (economic, socio/cultural and environmental). It ensures operators have strong business management, customer service, responsible marketing, environmental management, education/interpretation, respects culture and supports local businesses, communities and conservation.

The program coaches and mentors operators to build better businesses. The Program is approved by the Global Sustainable Tourism Council as world's best practice for ecotourism. With ECO certification comes international recognition and market access.

4. Enhancing National Parks as Tourism Destinations

National Parks and other protected areas are the key ecotourism asset within Northern Australia. For the industry to thrive, Governments need to invest wisely and sustainably to protect and enhance the National Parks, and other protected areas', values and potential. International visitation to National Parks increased by 15% in 2015.

The continuing attraction of the natural environment and the quality of the visitor experience depend on destinations that are well managed and work in a collaborative manner. National Parks and other types of protected areas provide the setting for many nature-based experiences and are seen by the visiting public as the tourism destination.

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.

- Long term and increased capital and recurrent budgets for Parks Agencies to
 - develop and maintain high quality and innovative built tourism infrastructure
 - Better protect the identified conservation and cultural values – the quality of these are the 'tourism product'
- National Parks Agencies to create 'tourism reference groups' of licensed tour operators and industry associations to provide estate wide input to park planning and issue management.
- A coherent and identical policy adopted by WA, NT, QLD and Parks Australia to private investment in Parks to encourage investors to see Northern Australia as a single investment opportunity – tourists and investors don't differentiate between who manages each Park

Best Practice Example:

Ecotourism Australia's Ecotourism Destination Certification Program has been developed specifically for Australia's iconic protected areas that provide significant opportunities for nature-based tourism and visitor experiences.

The Ecotourism Destination Certification program has been modelled on the Global Sustainable Tourism Council (GSTC) criteria for destinations and adapted to ensure relevance to large-scale and high-visitation protected areas.

The program emphasises the importance of adopting an interdisciplinary, holistic and integrative approach to protected area management, which is fundamental to ensuring the planning and management of protected areas is sustainable.

Ecotourism Destination certification enables Protected Area Management Agencies (PAMs) to demonstrate their commitment by ensuring the visitor experiences provided:

facilitates delivery on their responsibility to involve the local community, and
make a positive contribution to the region's visitor economy
meets visitor expectations

The program allows Protected Area Management Agencies to leverage Certification as part of a broader cultural change process within the agency, to ensure a positive view of sustainable tourism. The program is a tool to enhance the appreciation and understanding of protected areas internally within the agencies, and externally with key stakeholders and consumers.

Third party independent reviews and onsite auditing enables key recommendations to be developed, ensuring the protected areas have the right systems, policies and practices in place to ensure sustainable tourism outcomes for the destination and visitors.

5. Fostering Cultural Tourism

"Developing the north will need to be done in full partnership with Indigenous Australians, with a focus on creating opportunities through education, job creation and economic development. These opportunities for Indigenous Australians will contribute to achieving the objectives of the Government's Indigenous Advancement Strategy." – The White Paper on Developing North Australia

Ecotourism Australia are supportive of:

- Restarting the Indigenous Tourism Champions Program. The Indigenous Tourism Champions Program (ITCP) coordinated the delivery of cross-agency support to Indigenous tourism operators across Australia. This support – which was aimed at improving the quality, professionalism and visitor experiences of many of Australia's iconic Indigenous tourism products – increased the exposure of these offerings to the tourism market. IBA collaborated with its program partner Tourism Australia to deliver the ITCP, as well as other stakeholders such as the

Department of Resources, Energy and Tourism, and state and territory tourism organisations.

- Tourism NT to continue to deliver the NT Government's Indigenous Employment Program with a focus on attracting indigenous trainees, offering placements within Tourism NT in both Darwin and Alice Springs offices.
- Tourism Central Australia's advocacy for the development of a National Indigenous Cultural Centre in Alice Springs

6. Ensuring infrastructure meets the demands and expectations of visitors to the region

High quality infrastructure and ease of access are crucial to expanding the tourism industry driving growth in tourism opportunities and jobs. Tourism infrastructure development needs to be given equal value to resource and agricultural sector infrastructure needs.

Australia's export tourism industry is now more valuable to the national economy than coal or rural exports, and with international tourism spending growing at more than 10% a year the future looks extraordinary (ATEC, 2017). Tourism should be embedded in and represented in all infrastructure planning decisions.

Tourism Demand Driver Infrastructure and Infrastructure Development Funds offered through the State Tourism Organisations are both successful and essential. Tourism to the region was at a six year high in 2016 – with Government investing an extra \$24 million in tourism marketing and strategic product initiatives over the past three years.

Advancing Tourism 2016–20 is the Queensland Government's plan to capitalise on the significant tourism growth in Queensland. It targets key areas, identified by industry, to increase market share and boost tourism jobs. It outlines four strategic priorities including: Ensure that modern, high quality infrastructure is in place and visitors can enjoy seamless travel to and around Queensland.

7. Ensuring internet and phone accessibility and connectivity for businesses and visitors

Ecotourism Australia supports Tourism Central Australia's submission which stressed the need for:

- Stable, Fast Mobile and Data Services Across Northern Australia
- NBN Connectivity Fibre to the Premises in Major Towns
- Full Mobile and Data Coverage on Major Highways

Product development that ensures tourism operators are digitally equipped to meet the needs of travelers is crucial for destination competitiveness.

- Tourism Central Australia provides a Digital Integration Program to mentor individual tourism businesses for social media marketing and web

development. Ongoing long-term funding is required for this Program to continue.

- Tourism NT delivered Digital Leap Seminars to help operators capitalise on the latest digital marketing technologies.

Who we are - Ecotourism Australia

Ecotourism Australia (EA) is Australia's peak Industry body, representing over 500 ecotourism operators and members since 1991. EA's primary product development tool - ECO certification - is a world-recognised program with a Memorandum of Co-operation with UNESCO World Heritage Centre, recognition by the Global Sustainable Tourism Council and winner of the 'Tourism for Tomorrow' Award issued by the World Travel & Tourism Council. Ecotourism Australia has broad Membership in every state and Territory w. EA is self-funded and managed by active participants in the ecotourism industry whose membership's annual turnover is in excess of \$1.2B. Ecotourism Australia's ECO certification is recognised and incentivised by all Australian Protected Area Management agencies, reducing their risk and compliance costs whilst promoting high quality visitor experiences.

Ecotourism Australia thanks the Joint Standing Committee for the opportunity to provide a submission to the Inquiry into Opportunities and Methods for Stimulating the Tourism Industry in Northern Australia.

Your sincerely

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