TOURISM FOR THE FUTURE
- Responsible, Ethical, Sustainable -

Strategic Discussion Paper
Ecotourism Australia Ltd
2012 Edition

Vision:
To inspire environmentally sustainable and culturally responsible tourism

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TOURISM FOR THE FUTURE

To inspire environmentally sustainable and culturally responsible tourism

Who is Ecotourism Australia?

Ecotourism Australia’s vision:

"To inspire environmentally sustainable and culturally responsible tourism"

Ecotourism Australia was formed in 1991 as an incorporated membership based non-profit organisation, and is the peak Australian body for the ecotourism and nature tourism industry.

Membership includes tour operators, accommodation and attractions, tourism planners, protected area managers, academics and students, regional tourism associations and travellers.

Ecotourism Australia’s ECO Certification program was a world first in 1996 and since then has certified nearly 1300 tourism experiences throughout Australia.

Through this certification, Ecotourism Australia provides objective third party assessment, monitoring and auditing of organisations’ ecotourism claim, providing travel bookers and tourists with an assurance of best practice ecological sustainability, natural area management and quality ecotourism experiences.

In 2012, Ecotourism Australia was one of ten organisations recognised globally by the UN sponsored Global Sustainable Tourism Council for its Ecotourism and Advanced Ecotourism certification standard.

In 2008, the World Travel and Tourism Council awarded Ecotourism Australia the prestigious “Tourism for Tomorrow” Award for Conservation at the World Tourism Summit in recognition of Ecotourism Australia’s significant contribution to the conservation and preservation of natural heritage.

Ecotourism Australia now manages ECO, Respecting Our Culture (ROC), Climate Action and EcoGuide Certification Programs. Both ECO and ROC certifications have been accredited through the Australian Government TQUAL ‘Tick’ program and the Ecotourism and Advanced Ecotourism Certification have been recognised by the United Nations sponsored Global Sustainable Tourism Council.

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The Future of Tourism in Australia is driven by Nature

The Australian Government has identified the importance of the growth of tourism for the Australian economy.

However tourism in Australia has failed to flourish over the past ten years.

Tourism generates $94 billion in spending. As a sector, tourism contributes $34 billion in GDP – that’s 2.6% of Australia’s total GDP. Tourism is Australia’s largest services export earner and provides around half a million jobs. For tourism to continue to play a significant and sustainable role in the economy, the industry needs to be more competitive and productive. Over the past decade, Australia’s international competitiveness has not kept pace with global trends and this has translated into a decline in international market share. Domestic tourism’s visitor numbers have decreased with Australians increasingly choosing to travel abroad rather than at home.¹

The past 20 years has seen the rise of nature based and indigenous tourism within Australia. So much so that nature and indigenous experiences are now identified as one of Australia’s “KEY” experiences by the Australian Government². Australia relies on nature and indigenous tourism (as well as other elements of cultural tourism) as part of the core authenticity in the country brand to attract tourism.

This trend has occurred globally. In line with the growth in global concerns about the environment, there is more and more interest in responsible, ethical and sustainable travel options.

How the Australian tourism industry works within its natural and indigenous cultural environment is an issue of destination brand reputation. It is clearly contradictory for Australia to have the reputation for amazing natural environment and indigenous culture and then not deliver exceptional tourism experiences that conserve and respect the environment and indigenous culture.

Fortunately, in addition to supporting Australia’s brand reputation, responsible and sustainable practices within tourism businesses are starting to provide multiple commercial benefits.

According to the World Tourism Organization, ecotourism is considered the fastest growing segment in the tourism industry. The UNWTO has estimated the annual growth of ecotourism is from 10-20% to 30% of total adventure tourism, while its share in global revenues from international

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tourism will reach 10-15%. The UNWTO also believes that globally, Tourism can help the transition to a Green Economy3.

Internationally, there is research to support the predicted increased demand. Trip Advisor found that North American travellers were wanting to make more environmentally friendly choices in their travel decisions including increased interest in visiting National Parks, engaging in outdoor nature based activities, making more environmentally friendly travel choices overall, including their accommodation.

Even more relevant to Australia, research conducted by the Department of Resources Energy and Tourism in 2008 showed that UK travellers demand for Australia as a destination was positively influenced by the number of eco certified operators, despite the impact climate change may have on their propensity to travel long haul.

As identified in the Federal Government’s National Long Term Tourism Strategy:

Tourism Australia’s Brand Health Monitor Survey - Attitudes to Climate Change and Environmental Degradation, 30 March 2009 indicates that consumers in key Australian tourism markets are increasingly focusing on climate change and environmental sustainability when making purchasing decisions. Through enhancing awareness of environmental protection and sustainability, and ensuring proper management of natural assets, Australia has the opportunity to counteract negative consumer perceptions and purchasing behaviours, and to gain significant economic, social and cultural benefits from sustainable tourism.4

Tourism Research Australia data has shown that nature tourism brings great economic impact to regional areas of Australia. The average length of stay by nature based travellers is longer, and their overall spend is larger, than most other travellers. Nature based travellers also ‘disperse’ over a wider area of Australia, with their economic impact being felt in regional and remote areas of Australia.

The last data available from Tourism Research Australia showed nearly 3.31 million international tourists and 25 million Australians participated in nature tourism activities in 2009. The IVS also showed that 2.2 million international travellers visited a national or state park in 2009. As a guide to the high importance of nature tourism to regional areas, in 2009 Northern Territory and Tasmania had the highest rate of visitation to national parks with 83% and 72% of international visitors respectively.5

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3 World Tourism Organization (UNWTO), 2009, Roadmap for Recovery: Tourism & Travel A Primary Vehicle for Job Creation & Economic Recovery
5 Tourism Research Australia, International Visitor Survey (IVS) and National Visitor Survey (NVS) 2009, unpublished data.
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Research by the Tourism and Transport Forum (TTF) shows that over the three years to September 2011, nearly one in five domestic overnight travellers participated in some form of nature-based activity, staying 5.6 nights per trip and spending $171 per night.\(^6\)

More recent research from Tourism Research Australia in 2011 showed that 82% of international visitors and 62% of domestic visitors would choose “eco-accommodation”.\(^7\)

Ecotourism Australia believes that the opportunity to grow tourism in Australia lies in our ability as a destination to deliver tourism experiences which innately deliver the essence of what Australia is as well as being environmentally sustainable and responsible.

How the tourism industry in Australia develops relies heavily on leadership from both the public and private sector. Ecotourism Australia is prepared to work more closely with government in the development of a sustainable tourism industry and we invite government to partner with us as we build a ‘Green Visitor Economy’.

To that end, Ecotourism Australia has identified three priority areas to sustain and grow the Australian tourism industry in the future:

**Priority 1: Protecting our natural assets**

**Priority 2: Sustaining our industry**

**Priority 3: Telling our story**

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Priority 1: Protecting our natural assets

Striking the correct balance between connecting people to nature and the conservation of our natural and indigenous cultural assets demands those tourism operators who voluntarily achieve environmental based certification be recognised and valued.

We do not inherit the earth from our ancestors; we borrow it from our children.

~Native American Proverb

Recent debates around Australia have highlighted that tourism development in protected areas is of high concern to certain sections of the community. Many of these concerns are born of precedent.

Governments of all levels have a role to play in ensuring that tourism is responsible and sustainable. For the tourism industry to become more sustainable, government policy must be introduced to encourage or better still mandate that tourism developments in and buffering protected areas, must have achieved independent environmental certification to prove the sustainability and minimal impact of the operations.

Governments have a duty of care and responsibility in regard to protection of the environment. This is of particular importance in areas that are part of the indigenous cultural landscape.

At all levels, governments must appropriately protect and manage environmental sites that experience high popularity and/or are sensitive. This duty of care extends to a commitment to sustaining, enhancing and protecting biodiversity and geodiversity, the management of invasive flora and fauna, and the protection of areas of indigenous cultural heritage.

Governments must also play a more prominent role in ensuring that the interpretation and education of visitors to these sites is of the highest calibre and is accessible - this is in addition to the provisions of appropriate signage. It is also important that the visitor experience is delivered by appropriately experienced, capable and accredited guides and tourism operators.
Climate change is one of the largest threats to natural environments on the planet and Australian Governments should support voluntary action by tourism operators in response to the threat of climate change.

“UNWTO has recognized the high dependence of tourism activities on climate conditions, and the high vulnerability of many destinations to climate-change impacts. Transport, which is at the heart of travel and tourism is an evident challenge – not only high-profile air transport with its direct interrelationship to greenhouse gases, but also road transport and cruises, the latter being one of the fastest growing areas of the sector.

Taleb Rifai
Secretary General, UNWTO

The UNWTO estimates the global tourism industry is responsible for 5% of the global carbon emissions of which 75% is created by the transport sector. The rest of the tourism experiences create about 1% of the total global carbon emissions.

However it is a sector which is highly vulnerable to the impacts of climate change as a result of the sector’s heavy reliance on the natural environment. The tourism operators that rely on the Murray River or the Great Barrier Reef are particularly obvious.

However, any changes in climate, from increasing temperatures to increasing sea levels will impact on a large portion of the Australian tourism industry.

Tourism is also vulnerable to the impacts of climate change on the traveller’s perceptions and choices. How will consumers face the ethical dilemma of travelling in the future?

The Australian tourism industry is dominated by micro and small businesses. As a consequence, despite their desire to achieve environmental best practice, these businesses often struggle due to the limitations of their resources.

Many tourism organisations and travellers are proactively doing what they can for climate change, particularly in the areas of adaption, mitigation and as the only remaining option, voluntary offsets.

Many tourism organisations are actively encouraging their guests to participate in programs to reduce emissions, including voluntary offsets. Their positive action should be recognised within the broader government policy and framework.

9 World Tourism Organization (UNWTO), 2009, Roadmap for Recovery: Tourism & Travel A Primary Vehicle for Job Creation & Economic Recovery
Governments’ role is essential in the development of wildlife corridors which are environmentally vital in the face of climate change, as is the re-establishment of areas of open forests acting as carbon sinks and places to protect biodiversity.

Recent research has found that the planting of trees and re-establishment of ground cover actually lowers temperatures and assists with reducing evaporation.

Ecotourism Australia welcomes the announcement of the development of a National Wildlife Corridors Plan and actively will encourage engagement of all levels of government and community to support and foster these important initiatives.
SPECIFIC RECOMMENDATIONS:

1. Ensure that visitor experiences in protected areas are delivered by operators who carry appropriate environmental credentials like Ecotourism Australia’s ECO certification to assist with the conservation and protection of the natural environment and deliver quality education and interpretation.

2. Ensure that protected area management agencies are resourced sufficiently and have as a priority focus the responsibility to preserve and present the natural and indigenous cultural asset.

3. Recognise the indigenous cultural landscape and provide interpretation for tourists and education programs for all Australians.

4. Strengthen the checks and balances relating to environmental impacts of visitor facilities and activities by introducing new sustainability criteria for commercial operators which recognise and support ‘green’ accredited tourism operators.

5. Ensure a whole of government approach (Federal, State/Territory and regional) to the resourcing and development of the National Landscapes program to deliver tangible economic returns to regional economies.

6. Develop a National Landscapes grant process to facilitate the development of tourism experiences which strategically align and deliver consumer experiences that support the National Landscapes brand.

7. Provide as a priority, investment and support for micro and small business who demonstrate a commitment to a low carbon operating environment, particularly recognise and reward proactive programs like Ecotourism Australia’s Climate Action and ECO Certification through a range of initiatives including access to financial incentives and tax breaks, priority access to appropriate grants, priority access to public lands and licences, decreasing government regulatory burden, and prioritising marketing focus.

8. Support the ‘greening’ of the transport sector to reduce emissions, support responsible travel, and allay potential market reactions to the contribution of travel to climate change.


10. Continued support of the development of the National Wildlife Corridors Plan through opportunities like the already announced $946 million Biodiversity Fund and existing wildlife corridors like the Great Eastern Ranges.
Priority 2: Sustaining our industry

Ecotourism Australia believes that all of the tourism industry relies on the natural and cultural assets of Australia and the protection of its resource base into the future. Nature based tourism is non-extractive, contributes to the ‘Green Economy’ and provides income, social and environmental benefits for generations to come.

Tourism is a significant industry and a major contributor to the Australian economy.

Tourism directly employs more than 510,000 Australians across the country (4.5% of total employment), many in regional and remote areas.

Tourism contributes nearly $34.6 million to GDP (2.5% of total GDP) according to the 2010/2011 Tourism Satellite Accounts.\(^{10}\)

After manufacturing, tourism directly employs more people than agriculture, forestry and fishing (335,588), financial and insurance services (414,473), and wholesale trade (409,513) and more than twice as many people as mining (212,284).\(^{11}\)

Tourism’s GVA is $31.5 billion a year, and tourism exports are $23.7 billion a year. With tourism, government has the opportunity to manage capacity issues to help ensure the longevity of the export impact for good and for the future.

Managing Director of Tourism Australia, Andrew McEvoy recently stated:

> To stay competitive we (Australia) have to differentiate. I think our natural environment is a big part of that differentiation.\(^{12}\)

To provide Australia with the economic opportunity generated through tourism in the natural environment, demands that we also have in place policies and plans to support and promote the sustainable tourism operators in Australia.

Programs like National Landscapes Program have the capacity to do just this if given a higher priority at all levels of government in both developing the partnership between conservation and tourism but also promoting and supporting operators who are already doing it.

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\(^{10}\) Tourism Satellite Account, Australian National Accounts, cat. no. 5249.0, Australian Bureau of Statistics

\(^{11}\) No 5204.0 Table 5, Current Prices, Original, ABS; Labour Force Quarterly June 2011, cat. no. 6291.0.55.003 Table 4, Employed person by industry, Original, ABS

\(^{12}\) National Landscapes DVD released February 2012
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To treat sustainable tourism and nature tourism as a niche or special interest is to radically undersell and under estimate its importance to the longevity of the Australian tourism industry.

However for the tourism industry to be sustainable, tourism operators also require timely relevant and comprehensible research which is easy to access.

The National Long Term Tourism Strategy, which was unanimously endorsed by state and territory Tourism Ministers identified:

*Robust research needs to underpin the tourism policy, industry development and marketing of Australia. Research is vital to understand market developments, labour market trends and industry performance, and to anticipate the impacts of climate change, shifting consumer preferences and demography.*

The shift in the focus of Tourism Research Australia’s research agenda has seen a decrease in the provision robust, useful and timely research designed specifically for industry operators.

**SPECIFIC RECOMMENDATIONS:**

11. Support the long lasting economic and environmental benefits of tourism through proactive export industry development and support policies.

12. Profile Tourism in all Green Economy Strategies:
   - Integrate into national and regional legislation/regulations that encompass and encourage Green Economy strategies.
   - Profile tourism in Green employment strategies, Green investment, planning, procurement, fuel efficiency, and renewable energy programs.
   - Assist the development of the ‘green supply chain’, thereby prompting tourism businesses to buy local and use ‘green’ suppliers.

13. “SUSTAINABLE TOURISM DEVELOPMENT GRANT PROGRAM” - Support the development of a sustainable tourism grant program recognising the industry leaders who have voluntarily committed to triple bottom line sustainability.

14. Reinvest in a National Tourism Research Program which focuses on the sustainability of the tourism industry, particularly in the questions of product development, consumer demand and industry adaption with special consideration to the inherent limited capacity of the industry because of the dominance of small to micro business operators.
Priority 3: Telling our story

Australia’s reputation as a tourism destination, which places a high value on its natural and cultural assets and quality of its tourism experiences, is essential to Australia’s future success as a global tourism destination. Tourism has the opportunity to educate, inspire and transform travellers through meaningful engagement with the land and its people.

Just as government rightly seeks to protect and preserve important natural environments like the Great Barrier Reef, so the protection of Brand Australia is equally important.

The Australian Government seeks to protect Australia’s Approved Destination Status (ADS) with China, through the monitoring of tourism operators under the ADS Code of Business Standards and Ethics. Similarly governments must seek to protect the millions of publicly funded dollars invested by the Australian, State/Territory and Local governments on tourism destination marketing and initiatives such as the National Landscapes Program and Indigenous Tourism Champions.

We protect what we value. Australians’ demand for ecotourism and indigenous tourism is a lower percentage of the travelling population, than is the global norm in the Western world.

Tourism Research Australia data for 2011 shows that 60% of international visitors to Australia participate in nature based activities compared to 19% of all domestic travellers. Similarly 13% of all international visitors to Australia participated in indigenous tourism activities compared to less than 1% (306,000 domestic overnight trips) of all domestic travellers.

Australians need to develop a stronger commitment to the inherent synergy between tourism and conservation when making their holiday decisions. They need to carry their concerns about the environment and climate change, from their home to their holiday destinations.

Ecotourism Australia can be a key partner with government to make this happen. We can mobilise our large membership to be part of a national program. The result would be to encourage visitors to take home the concept (reduce, reuse, recycle, offset), reduce consumption and lend a hand in conservation.

Likewise, Australians need to value the indigenous cultural landscape and learn to understand the importance of the physical form of the landscape to indigenous culture, and the stories and heritage imbedded in the landscape.
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Australians need to learn to cherish and value indigenous culture as it is valued by international visitors. Tourism can play an important role in building cross cultural understanding to deliver a more harmonious society. And again such a strategy would help our worldwide image.

We cultivated our land, but in a way different from the white man.
We endeavoured to live with the land; they seemed to live off it.

- Tom Dystra - Aboriginal man

SPECIFIC RECOMMENDATIONS

15. Develop an education campaign that will help generate environmental and cultural ethics within urban Australia. With a goal to encourage Australians to visit and enjoy our natural and indigenous cultural landscape as well as a vital foundation to build greater awareness of the responsibility we each have to protect the biosphere and indeed ensure our own survival. Education of visitors to make the right environmental choice should be a key responsibility of industry and government, lets encourage visitors not only to love but to protect our natural assets for future generations of visitors.

16. Indigenous cultural heritage, which could be extended to include bio cultural diversity and the link between Aboriginal caring for country and the responsibility of man to act as guardians for the land, is the critical element of any stories about Australia, should be extended far beyond the visitor experience and into the classrooms of Australia.

17. The National Landscapes Program needs to extend beyond a branding and marketing exercise, to ensure that tourism experiences reverberate with truth of our custodianship and care of Australia’s natural tourism advantages.

18. Empower Tourism Australia to actively support (via marketing activities) the tourism businesses that preserve Australia’s brand reputation, as a country that actively protects while promoting its environment.

19. Support high quality tourism through marketing development and assistance; provide priority access to campaign activity and build consumer awareness, particularly for those tourism operators who demonstrate their commitment to sustainability through certification that focuses on protecting our natural and cultural assets.
SUMMARY OF PRIORITIES AND SPECIFIC RECOMMENDATIONS:

Priority 1: Protecting our natural assets

Striking the correct balance between connecting people to nature and the conservation of our natural and indigenous cultural assets demands those tourism operators who voluntarily achieve environmental based certification be recognised and valued.

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6. Develop an National Landscapes grant process to facilitate the development of tourism experiences which strategically align and deliver consumer experiences that support the National Landscapes brand.

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