

Secretary
Standing Committee on Climate Change,
Environment and Water

30 April 2012

Submission to Inquiry into Current and Potential Ecotourism of the ACT and Region

Threesides background

Threesides is a marketing agency based in Canberra with a specialisation in the tourism and leisure sector. We provide marketing advice, training and project management services for a range of private sector and government tourism organisations. Over the past 4 years this has included ACT Tourism, Tourism Snowy Mountains, Eurobodalla Tourism, NSW National Parks and Wildlife Service, National Gallery of Australia, National Capital Attractions Association, Ride Canberra and a range of accommodation and tour service companies.

Our view is that the ACT is largely unrecognised as a nature-based tourism destination despite having a range of compelling experiences to attract interstate and international visitors. With the right policies, and investment in infrastructure and marketing the ACT could realise its identity as the Bush Capital and increase its share of visitors from the lucrative and growing nature-based tourism sector.

Eco-tourism or Nature-Based?

There is much debate in the tourism industry about the use and definition of the term 'Ecotourism'. The Ecotourism Association www.ecotourism.org.au provides a definition and accreditation program for operators, and guide for tourists to help them choose accredited businesses. Due to limited funding and voluntary accreditation, it is yet to realise the full potential of the program and brand awareness with tourists, though is a step in the right direction and should be considered in this inquiry.

NSW National Parks and Wildlife Service has its own accreditation program for Commercial Tour Operators that provides access for private industry to operate in NSW national parks as long as they comply with a range of guidelines. A similar program could be adopted by ACT government which would provide tourists with the confidence that operators are responsible environmental ambassadors.

Rather than focussing on the definition and accreditation of Ecotourism, there is far more opportunity for the ACT and region to support all types of responsible 'nature-based tourism' being any experience that

provides the opportunity for visitors to access the wide range of nature based locations and experiences that the ACT and region has to offer. Guidelines for responsible nature based tourism are important, though should not be the sole focus of this inquiry and resulting projects or programs.

Nature-based tourism in ACT and Region – the industry and opportunity

The region surrounding the ACT offers a diverse range of compelling nature based destinations and tourism experiences focussed mainly around coastal and snowy mountains areas in state and national parks. This includes bushwalking, cycling, boating, surfing, sightseeing, snow-sports, educational tours, photography, 4WD touring, camping and caravanning.

In these coastal and snowy mountains areas, the tourism industry use nature as the key drawcard for tourists providing a range of services including accommodation, tours and guides, food and beverage, equipment rental and supplies. An overview of the tourism industry in these areas can be found on these visitor focused websites here:

www.snowymountains.com.au

www.eurobodalla.com.au

www.sapphirecoast.com.au

The focus of tourism promotion for the ACT is national attractions, exhibitions and events such as Australia's War Memorial, National Gallery and events such as Floriade. These attractions and events draw a significant number of tourists to Canberra with a significant economic impact on the local economy and should continue to be a focus for tourism promotion. Enhancing the focus on nature-based tourism in the ACT will provide the opportunity to extend the length of stay and spend of the current visitor, and attract a new type of visitor to the ACT. Locals are aware of and enjoy the ACT's unique status as the Bush Capital with easy access to a range of nature-based recreation experiences, though this is something that the ACT tourism industry has yet to take advantage of.

To attract the nature-based tourist, the ACT Government will need to increase its focus on nature-based experiences in its marketing. Partnering with nearby regions that focus their marketing on attracting nature-based tourists the ACT also has potential by building itineraries and touring routes that include the ACT.

If you build it they will come

The ACT government has realised that infrastructure is an important aspect of providing exceptional nature-based experiences for locals and tourists alike with the upgrade of Tidbinbilla, development of the Gibraltar Track and Stromlo Forest Park and the upcoming Centenary Trail project. However a clear plan for accommodation options for nature-based tourists is lacking and impacting the development of the industry.

There is currently a severe lack of accommodation options for campers, caravanners and cabins in ACT nature areas. These are the preferred accommodation options for nature-based tourists and with limited options available, have created a barrier to attracting them to the ACT. The opportunity exists for the ACT government to partner with private industry to create and run these accommodation options, providing a revenue stream for future investment in infrastructure. A similar model has been used by NSW National Parks and Wildlife Service who run accommodation operations in national parks.

The other barrier to attracting nature based tourists is awareness of the nature-based tourism offering in the ACT. The tourism industry is a highly competitive marketplace and with minimal current investment in marketing the ACT's nature based tourism offering, it struggles to compete against other destinations. The opportunity exists for the ACT government to partner with industry in creating promotions that raise its profile as a nature-based tourism destination.

When investing in nature-based recreational infrastructure and experiences, consideration should be given by ACT government to short term and long term marketing of the experience. If industry sees a commitment to promotion of nature-based tourism experiences it will then develop the products and services to cater to and support this marketing.

Research – what do we know?

As part of this inquiry it is recommended that the Commonwealth Government organisation Tourism Australia is consulted. They have previously commissioned research into the nature based tourism sector and have access to a range of data on the economic impact of the nature tourist. One such report is attached to this submission.

Key Contact

If you require any further information in relation to this submission or need a witness testimony as part of the inquiry please contact:

Clint Wright

Nature Tourism Fact Sheet 2009

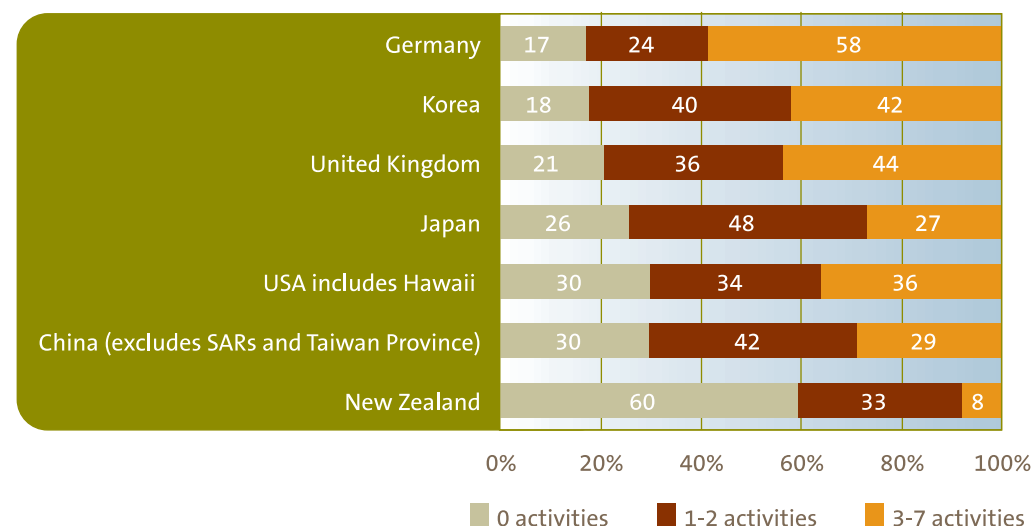
International visitors

- In 2009, there were 3.3 million international nature visitors. This was 64% of all international visitors to Australia.
- Of those that participated in nature activities, 31% took part in only one nature activity, 25% in two, and 44% in three or more activities.
- The top nature activities for international visitors *were visiting national/state parks (66%); visiting wildlife park/zoo/aquarium (57%) and visiting botanical or other public gardens (56%)*.

	No nature activities	1–2 nature activities	3 or more nature activities
Visitors ('000)	1,869 visitors	1,842 visitors	1,463 visitors
Nights ('000)	38,652 nights	62,532 nights	75,944 nights
Average length of stay	21 nights	34 nights	52 nights
Expenditure	\$175 per night \$3,614 per trip	\$145 per night \$4,931 per trip	\$137 per night \$7,116 per trip
Purpose of visit	28% business, VFR* 27% holiday	49% holiday 28% VFR	67% holiday 17% VFR
Number of stopovers	74% 1 stopover 5% 4 or more stopovers	55% 1 stopover 15% 4 or more stopovers	24% 1 stopover 48% 4 or more stopovers
Travel party	72% travel unaccompanied	55% travel unaccompanied	47% travel unaccompanied
Origin of visitors	13% adult couples 32% New Zealand	24% adult couples 18% New Zealand 12% United Kingdom	30% adult couple 19% United Kingdom 11% USA

- Visitors from Switzerland (63%), Netherlands (59%) and Germany (58%) were the most likely to participate in three or more nature activities while in Australia.
- Over half of visitors from New Zealand (60%) did not participate in any nature activities.

Tier 1 markets



Domestic overnight visitors

- In 2009, there were 12.5 million domestic overnight trips that included a nature activity. This was 19% of all domestic overnight trips.
- Of those that participated in nature activities in 2009, 67% participated in only one nature activity, 27% in two activities, and 7% in three or more nature activities.
- The top three nature activities were *bushwalking/rainforest walks* (48%); *visiting national/state parks* (47%) and *visiting botanical or other public gardens* (19%).

	No nature activities	1–2 nature activities	3 or more nature activities
Visitors ('000)	53,619 visitors	11,648 visitors	810 visitors
Nights ('000)	186,302 nights	61,471 nights	8,908 nights
Average length of stay	3 nights	5 nights	11 nights
Expenditure	\$160 per night \$556 per trip	\$175 per night \$924 per trip	\$202 per night \$2,220 per trip
Purpose of visit	39% holiday 35% VFR 22% business	70% holiday 26% VFR	87% holiday 15% VFR
Number of stopovers	91% 1 stopover	82% 1 stopover	63% 1 stopover
Travel party	28% travel unaccompanied 27% adult couple 22% family group 17% friends or relatives travelling together	32% family group 30% adult couple 22% friends or relatives travelling together	35% adult couple, family group 23% friends or relatives travelling together

Data sources

Tourism Research Australia National Visitor Survey (NVS) and International Visitor Survey (IVS), 2005–2009 (unpublished data).

All figures refer to persons over the age of 15 years.

Notes

The following activities are defined as nature activities: (1) *visit national parks or state parks* (2) *visit botanical or other public gardens* (3) *bushwalking or rainforest walks* (4) *visit wildlife parks, zoos or aquariums* (5) *go whale or dolphin watching* (6) *scuba diving* (7) *snorkelling*.

Expenditure includes all expenditure related to the trip (excludes motor vehicles for domestic spend)

*VFR – Visiting friends and relatives

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Wildflower, Fitzgerald River National Park, WA
Image courtesy of Tourism WA

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