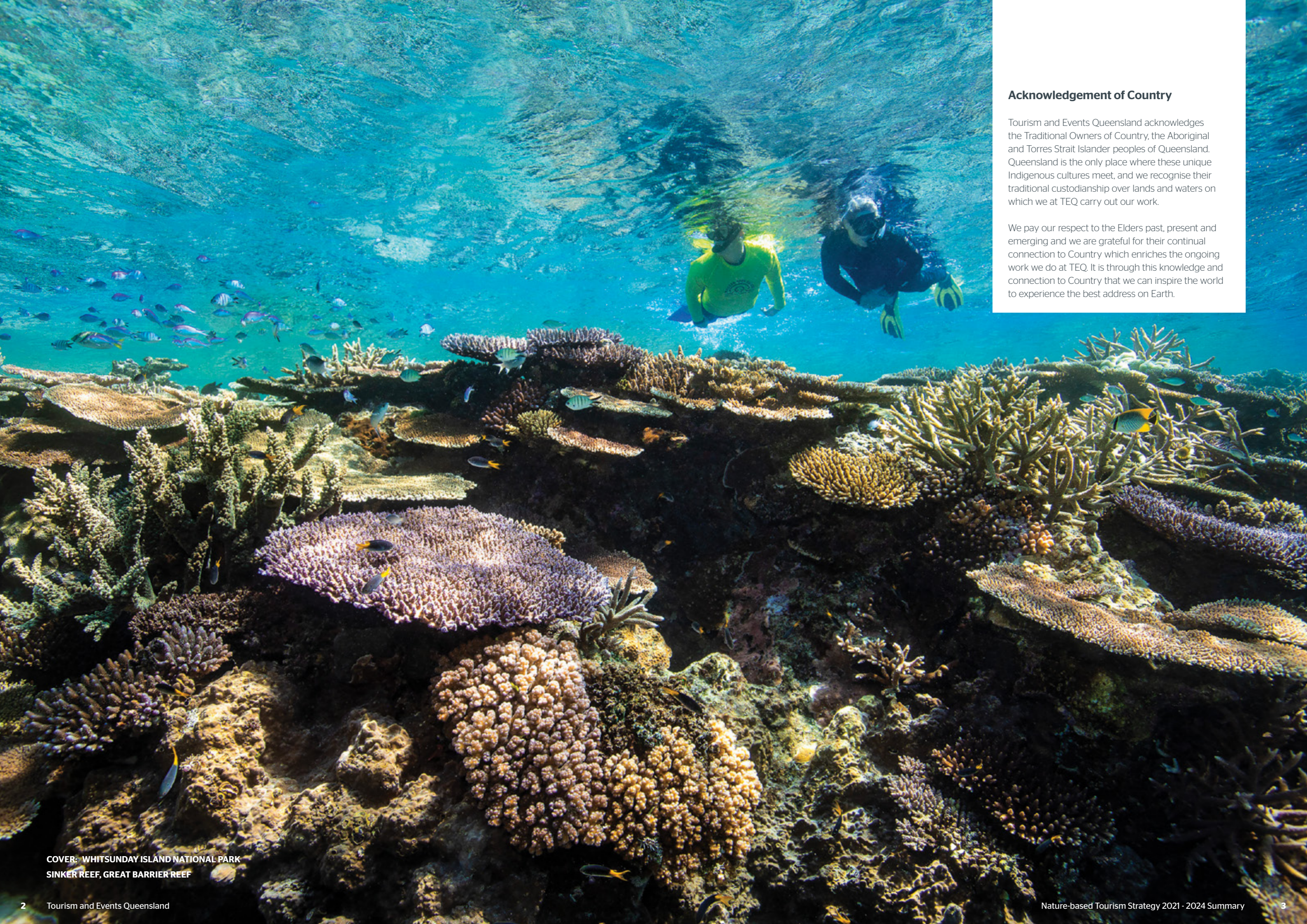


June 2023

# Tourism and Events Queensland's Nature-based Tourism Strategy 2021-2024

*Practical advice on how you can re-imagine your visitor experience to better meet the needs of an ever-evolving nature-based tourism market.*





### Acknowledgement of Country

Tourism and Events Queensland acknowledges the Traditional Owners of Country, the Aboriginal and Torres Strait Islander peoples of Queensland. Queensland is the only place where these unique Indigenous cultures meet, and we recognise their traditional custodianship over lands and waters on which we at TEQ carry out our work.

We pay our respect to the Elders past, present and emerging and we are grateful for their continual connection to Country which enriches the ongoing work we do at TEQ. It is through this knowledge and connection to Country that we can inspire the world to experience the best address on Earth.

# Why a strategy?

The aim of the Nature-based Tourism Strategy 2021-2024 is to support the revitalisation of the Queensland nature-based tourism offering to more effectively capitalise on the growing and evolving consumer demand for experiences in nature and to maximise Queensland's world class natural and cultural assets.

This strategy has been framed in the context of Queensland's purpose-led brand philosophy of 'travel for good', to firmly position Queensland globally in the new era of 'transformational travel'. Queensland is presented to the world as a deeper, more meaningful and engaging travel destination where experiences delivered will change travellers and the world for the better.

## Goals

This strategy is designed to support TEQ's overarching goals for Nature-based tourism, which are to:

- Grow positive awareness of the depth and breadth of Queensland's nature-based tourism experiences together with intention to travel for these experiences in domestic and global markets.
- Support industry and the wider tourism network to maximise the potential of Queensland's natural and cultural assets as outstanding must-do visitor experiences.
- Inspire the tourism industry to continue to positively support and contribute to the conservation of Queensland's natural wonders.
- Drive visitation to Queensland through participation in transformative nature-based tourism experiences.

Revitalising the Queensland nature-based tourism offering is focussed on inviting and providing the opportunity for travellers to go beyond simply admiring and passively experiencing Queensland's natural and cultural heritage and engage in truly transformational experiences that connect with them on a deeper level.

The following nature proposition has been developed as a clear and compelling message to reflect both the changing needs of the global nature traveller market and the pivotal role of nature and Aboriginal and Torres Strait Islander cultures in the Queensland tourism story:

*"Pristine natural wonders on a globally significant scale. From vast landscapes, to the rainforests to the beaches and the reef, Queensland is home to the most naturally diverse ecosystems on earth. Play your part in nurturing, appreciating and contributing to these natural wonders. Experiences that will move you through connection with ageless cultural traditions. Experiences that will feed the mind, activate the body and lift the heart."*

The strategy has been developed to guide TEQ's marketing and experience design activities over the next three years with a focus on:

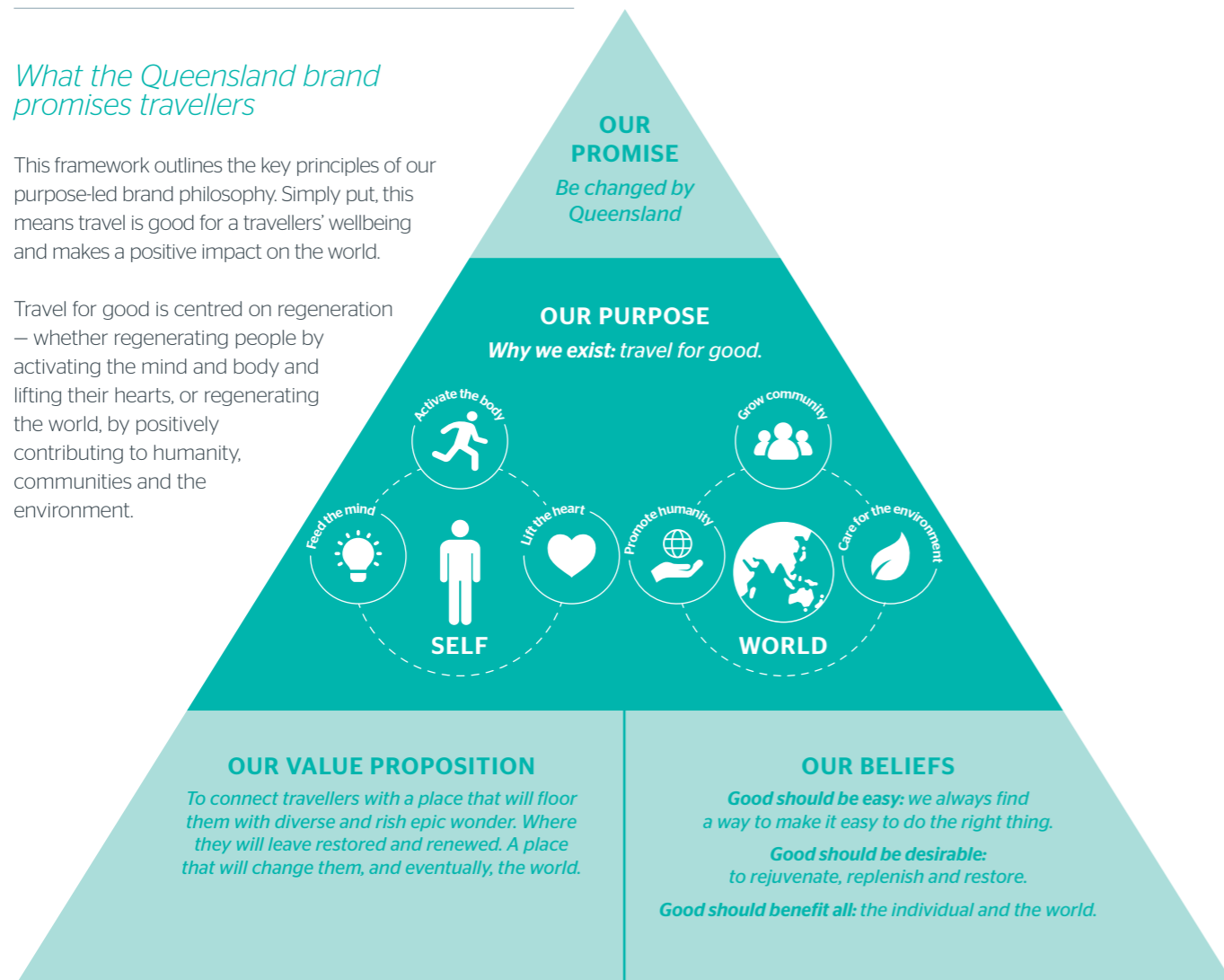
- **Revitalising the image** of Queensland nature-based tourism opportunities highlighting the breadth of transformational visitor experiences in nature
- Maximising the domestic and international marketing potential of **Queensland's five World Heritage Areas**
- A more tailored and agile approach to telling Queensland's Nature Story to our Global Consumer Segments through **TEQ's Nature Traveller Sub-Segment Strategy**
- Increasing the number of immersive and engaging nature-based tourism experiences in Queensland through **TEQ's experience design programs**

- Greater profiling of the **links between Aboriginal and Torres Strait Island cultures and Queensland's world class natural assets** and support for the development of new Indigenous tourism experiences in nature
- Prioritisation of the nature-based tourism experiences that will deliver **the best return-on-investment** for Queensland's marketing and experience design activities
- A greater emphasis on the role of **the 'Guide'** in delivering transformational experiences in nature that exceed guest expectations
- Increasing the number of **events that profile and celebrate Queensland's world class natural and cultural assets**
- TEQ being seen as a **leader in corporate environmental, social and cultural responsibility**
- Stronger and more productive **working relationships** between the Queensland tourism industry and Queensland's Protected Area Management agencies

## What the Queensland brand promises travellers

This framework outlines the key principles of our purpose-led brand philosophy. Simply put, this means travel is good for a travellers' wellbeing and makes a positive impact on the world.

Travel for good is centred on regeneration – whether regenerating people by activating the mind and body and lifting their hearts, or regenerating the world, by positively contributing to humanity, communities and the environment.



## Performance Indicators

TEQ is aiming to achieve the following by June 2024:

1. Percentage of domestic overnight leisure visitors to Queensland who participate in nature-based activities. Target – 28.5% to 31.0%<sup>1</sup>
2. Increase the percentage of international out of region travellers who associate Queensland with nature and wildlife. Target – 80%<sup>2</sup>

<sup>1</sup> National Visitor Survey, Tourism Research Australia

<sup>2</sup> Consumer Demand Project, Tourism Research Australia



# What's in it for me?

The insights and analysis that informed the development of the Nature-based Tourism Strategy and the focus for Tourism and Events Queensland (TEQ) over the next few years, provide valuable direction for Queensland's nature-based tourism operators. These insights and direction can assist operators in adapting to the changing needs of the global nature travel market by understanding how the following five core areas may influence their operations:

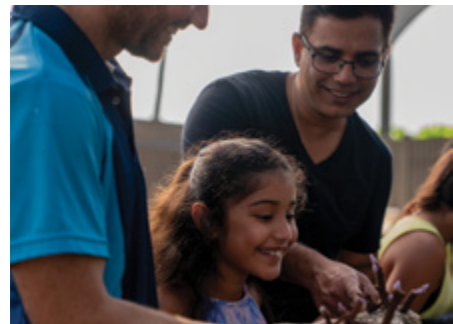
1. Emerging nature travel trends
2. Unlocking Queensland's potential
3. Understanding the nature-based tourism spectrum
4. Experiences celebrating nature
5. The role of the 'Guide'

## 1. Emerging nature travel trends

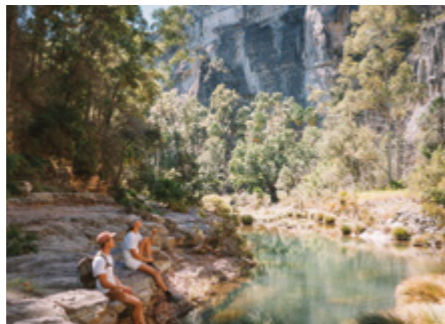
Experiences in nature have always been a key driver for global travel and as the world emerges from the COVID-19 pandemic, research and expert opinion suggests that 'tuning into nature' will be seen as the antidote for Coronavirus lockdowns. This is expected to result in increased demand for experiences in open spaces and wild places as travellers look to escape crowds, regenerate and re-connect with themselves, family, friends, the environment and the world around them.

- What do the following trends mean for your visitor experience?
- Can you see how these insights might influence changes to your existing experiences or provide the basis for a new experience?

### Global travellers are looking for:



Active participation: *with the ability to make a positive difference*



Reconnection: *with self, nature and others*



A transformational experience *moments of connection*



Travel that benefits or at minimum does no harm to the natural environment



Mental health/wellbeing, rest or physical stimulation



Hygienic and safe operational practices



World-class natural settings with strong visual aesthetics.



Deeper understanding of Indigenous culture



Experiences that broaden minds and ability to learn something new

## 2. Unlocking Queensland's potential

Queensland's diverse natural assets provide the basis for a strong nature-based tourism sector. The 'jewels in the crown' of the state's natural assets are our five World Heritage Areas:

**GREAT BARRIER REEF** celebrating reefs, islands and beaches from Cape York to Bundaberg.

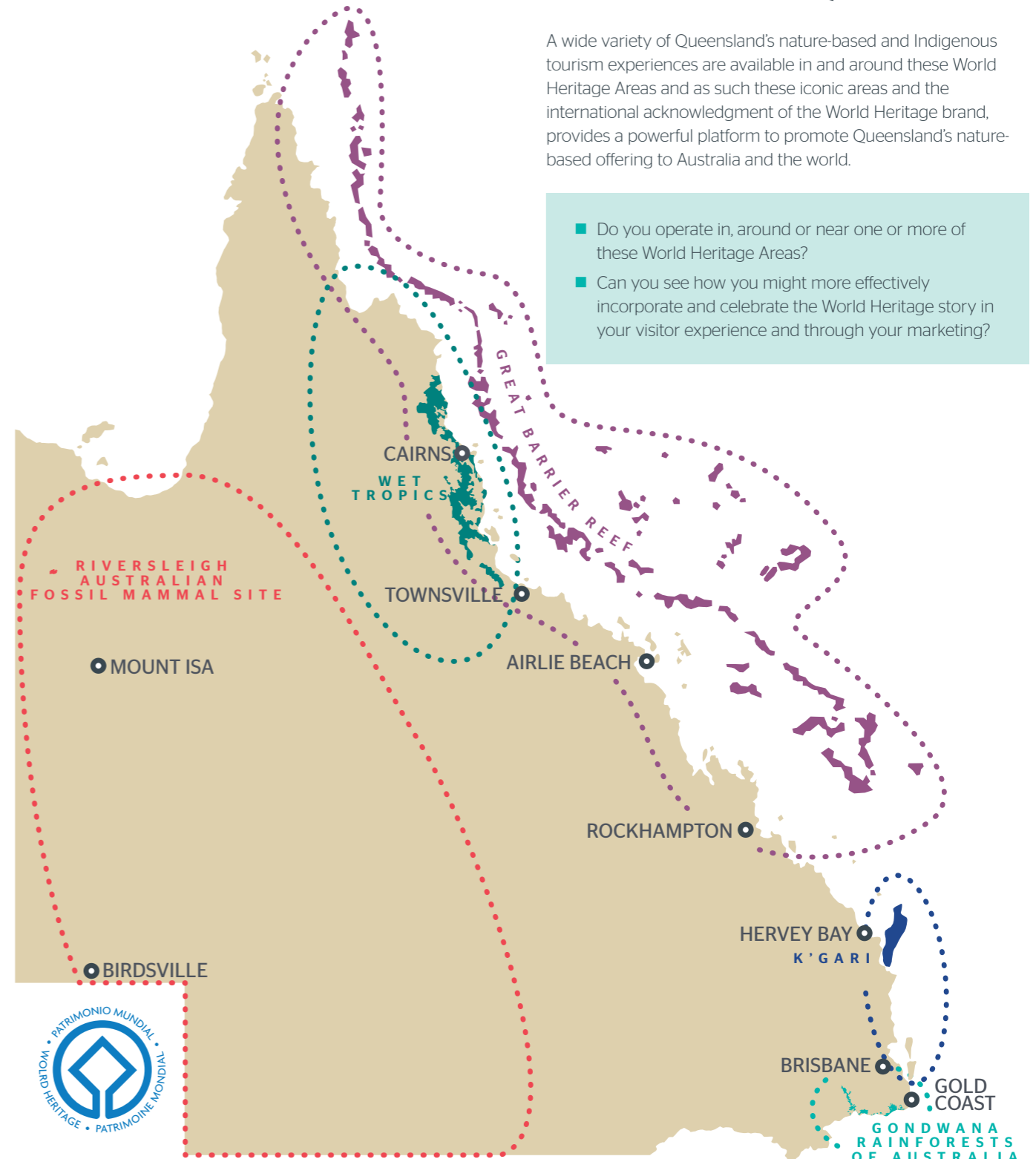
**WET TROPICS OF QUEENSLAND** celebrating the natural wonders of Townsville, Tropical North Queensland and Cape York.

**RIVERSLEIGH AUSTRALIAN FOSSIL MAMMAL SITE** celebrating dinosaur fossil sites across Outback Queensland.

**K'GARI (FORMERLY FRASER ISLAND)** celebrating Queensland's iconic sand islands and surrounds including Minjeeribah (North Stradbroke Island) and Mulgumpin (Moreton Island).

**GONDWANA RAINFORESTS OF AUSTRALIA** celebrating the vast natural attractions of south-east Queensland.

A wide variety of Queensland's nature-based and Indigenous tourism experiences are available in and around these World Heritage Areas and as such these iconic areas and the international acknowledgment of the World Heritage brand, provides a powerful platform to promote Queensland's nature-based offering to Australia and the world.



### 3. Understanding the nature-based tourism spectrum

To effectively address how visitors want to participate in nature-based tourism activities and events it is important to understand that motivations can be many and varied, occurring across a broad spectrum from passive to immersive.

This spectrum highlights that engagement ranges from casual natural encounters, such as a short nature walk, through to an immersive, interactive experience of environmental conservation

which could include tree planting, coral research or supporting local communities

Nature-based experiences should consider accessibility for visitors of all ages and abilities and allow equal access for all wherever possible, regardless of their position along the spectrum or the type of experience offered.

#### Nature-based tourism spectrum



#### Some examples

Each stage of the spectrum has been articulated to reflect the level of engagement with nature across some common nature-based tourism experiences.



#### Nature-travellers' spectrum

It is also valuable to view this spectrum from a visitor perspective. This figure highlights the different motivations for participating in nature-based tourism and the associated varied levels of personal incentive.



#### Some examples

Each stage of the spectrum has been articulated to reflect the level of engagement with nature across some common nature-based tourism experiences.



- Where do you think your offering generally sits on the spectrums?
- How engaging is your experience?
- Does your experience feed the mind, activate the body and/or lift the heart?
- Do you offer opportunities for guests to contribute or participate in conservation initiatives?
- Do you cater to one type of nature traveller or a broad range of motivations?
- Does your position on the tourism spectrum generally align to your position on the traveller spectrum? Why or why not?
- How can you create moments of connection to engage your guests with nature even more?
- Are you interested in moving your position on the spectrums?



SCENIC RIM, BRISBANE

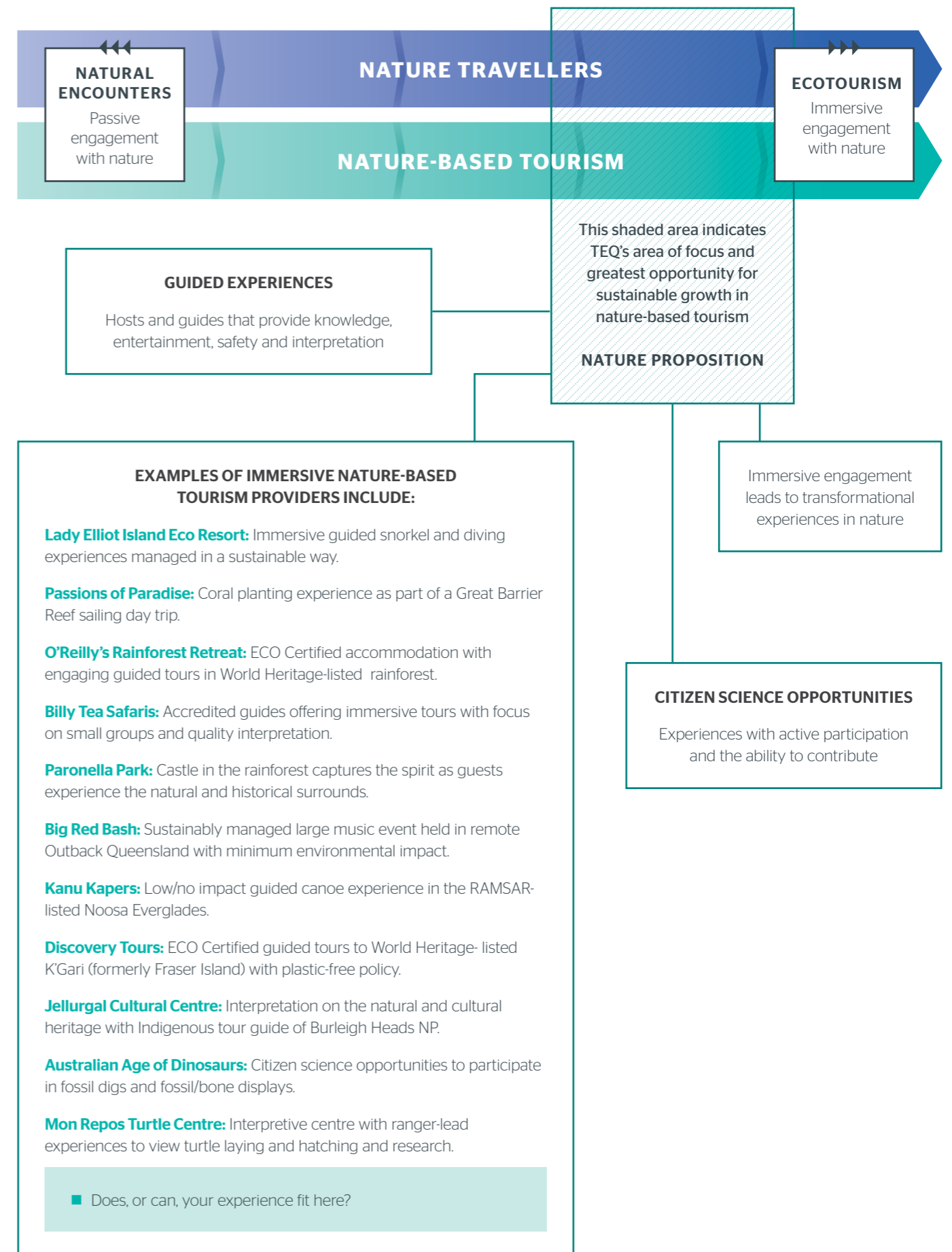
### Focussing on immersive experiences

Based on the research insights TEQ has determined that the most valuable proposition for Queensland's nature-based tourism industry is to focus on immersive engagement, with experiences that offer knowledge, appreciation of the natural environment and the ability to participate and contribute. These are the experiences that will:

- feed the mind, activate the body and lift the heart,
- enable visitors to make a positive contribution to the environment and communities they visit,
- stimulate industry to deliver more engaging, memorable and transformational experiences that exceed visitor expectations, and
- increase visitor numbers, spend and length of stay.

The focus on this area of the nature-based tourism spectrum will maximise the potential of Queensland's nature-based tourism assets, most effectively align with the Queensland brand direction and will best match visitors with the right experiences. It will also generate increased visitor expenditure and length of stay leading to higher operator yields.

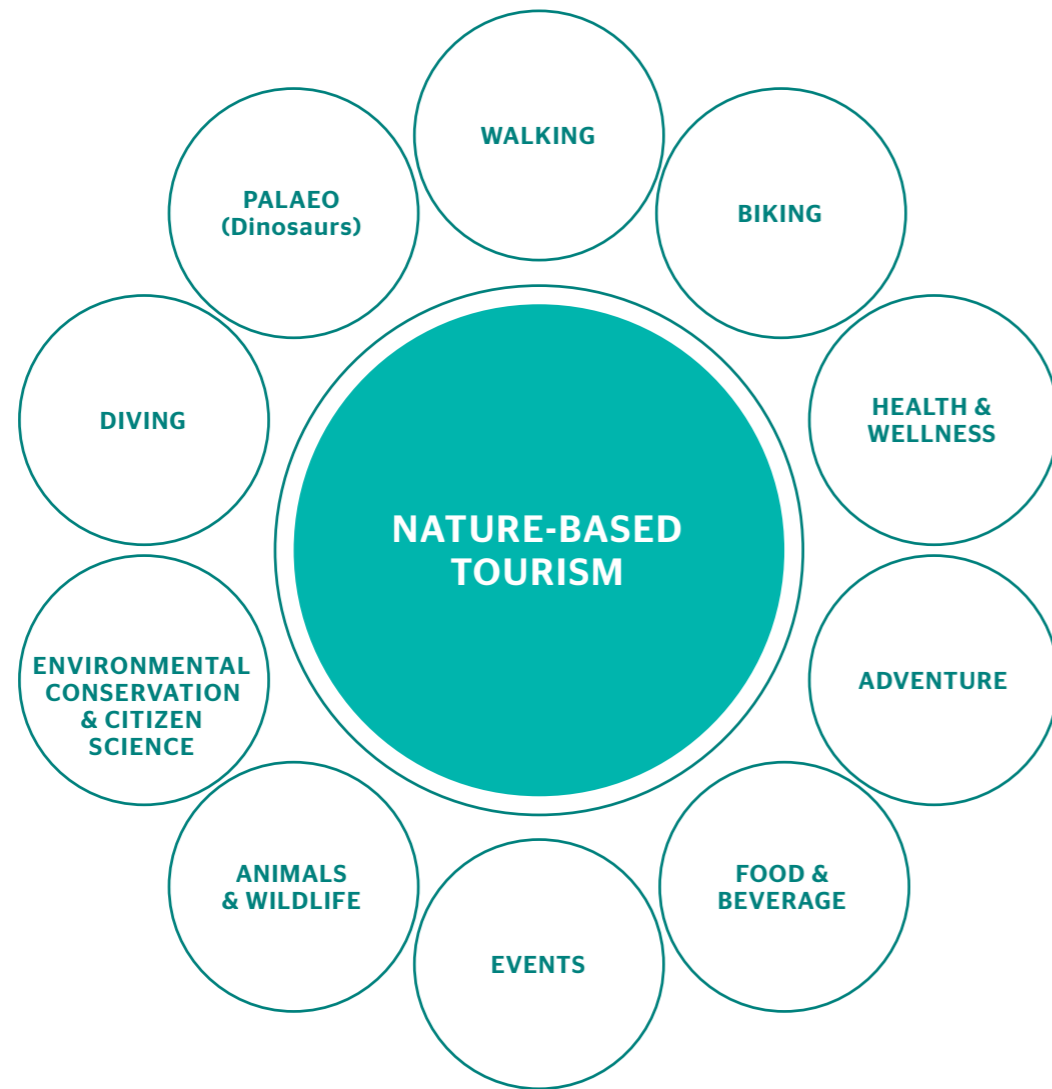
### Area of opportunity for Queensland



## 4. Experiences celebrating nature

There are a wide variety of different ways visitors to Queensland can engage with nature, providing broad scope for the development of a diverse and successful nature-based tourism industry. The following list of experiences represent

existing and potential opportunities that require ongoing investigation for growing and diversifying the nature-based tourism sector in Queensland.



EXPERIENCE	RELEVANCE FOR QUEENSLAND'S NATURE-BASED TOURISM SECTOR
<b>Walking</b>	<ul style="list-style-type: none"> <li>Walking is increasingly popular with Australian and international visitors.</li> <li>Walking holidays appeal to visitors looking for short, medium and multi-day options.</li> <li>The target market for walking holidays tends to be solo travellers, couples and older families.</li> <li>The Queensland Eco Trails program is being developed to broaden the commercial walking offering in protected areas: <ul style="list-style-type: none"> <li>» Wangetti trail, Tropical North Queensland</li> <li>» Thorsborne trail, Hinchinbrook Island, Townsville</li> <li>» Cooloola Great Walk, Sunshine Coast</li> <li>» Ngaro Walking Track Whitsunday Island, The Whitsundays</li> <li>» Paluma to Wallaman Falls Trail, Townsville</li> </ul> </li> <li>Accessibility for travellers with physical needs should be considered.</li> <li>Both 'on-park' and private options in natural settings could be made available.</li> <li>Queensland destinations can identify walks that best celebrate their natural and cultural points-of-difference and which best match consumer demand trends.</li> </ul>

EXPERIENCE	RELEVANCE FOR QUEENSLAND'S NATURE-BASED TOURISM SECTOR
<b>Biking</b>	<ul style="list-style-type: none"> <li>Biking and cycling are increasingly popular globally for recreational users and holidaymakers.</li> <li>Bike tourists tend to spend more and stay longer than the average visitor.</li> <li>Availability of cycle trails in a scenic natural setting can be a motivator in destination choice.</li> <li>Four main categories of bike tourism are trail riding, mountain biking, road cycling and holiday riding.</li> <li>Dedicated bike trails in natural, scenic areas have the broadest appeal to the bike tourism market.</li> <li>Queensland has a year-round climate suitable for cycle tourism.</li> <li>Queensland destinations with suitable infrastructure could attract new audiences by focussing on this target market and their needs.</li> <li>Endurance events in Queensland are another avenue to target a bike tourism audience.</li> </ul>
<b>Diving</b>	<ul style="list-style-type: none"> <li>Diving and snorkelling are core experiences for Queensland's Great Barrier Reef (GBR) regions and the basis for many nature-based tourism operators.</li> <li>Queensland has 5% market share of the 6 million global dive travellers.</li> <li>SCUBA diving clientele are "big spenders".</li> <li>Queensland has exceptional dive experiences with both wreck diving and diving on the GBR (outer reef) and GBR Islands.</li> <li>The Master Reef Guide program ensures a high-quality visitor experience.</li> </ul>
<b>Palaeo tourism</b>	<ul style="list-style-type: none"> <li>Concentrating on key aspects of palaeo tourism such as 'dinosaurs' is a unique selling point for Outback Queensland, supported by nature-based attractions across the destination.</li> <li>TEQ will implement the <i>TEQ Dinosaur Tourism Road Map</i> as the catalyst to grow the economy in Outback Queensland.</li> </ul>
<b>Animals &amp; wildlife</b>	<ul style="list-style-type: none"> <li>Australian wildlife, particularly unique, iconic animals are a strong drawcard for visitors.</li> <li>Tour guides are particularly significant in locating and sharing knowledge of wildlife whilst on tour.</li> <li>Ethical practices for the treatment of animals have seen a decreased demand for some wildlife attractions and an increased desire to encounter wildlife in their natural habitat.</li> <li>Some niche groups in animal viewing e.g., specific travel for birdwatching, whale watching, turtle hatching occurs in Queensland.</li> <li>Wildlife creates emotional connections with nature travellers.</li> <li>More experiences could be developed that allow visitors to participate and contribute to the care and protection of Australian animals, with priority on promoting animal encounters in a sensitive manner.</li> </ul>
<b>Environmental conservation &amp; citizen science</b>	<ul style="list-style-type: none"> <li>Travellers who want to make a difference while on holidays have an increased focussed on sustainable practices of the accommodation, tours, attractions and destinations they choose to visit.</li> <li>With conservation and citizen-science programs, options include commercial (paid) or volunteer (free to participate).</li> <li>The Federal Government program for GBR operators to engage guests in reef studies is the Eye on the Reef program. A similar program for land-based conservation could provide opportunity for commercial operators and visitor participation.</li> <li>Queensland has a high number of ECO Certified products and ECO Destinations that can be highlighted in promotion.</li> </ul>
<b>Health &amp; wellness travel</b>	<ul style="list-style-type: none"> <li>Travelling for health and wellness includes experiences designed to reduce stress and anxiety, provide rest and relaxation, transform the body/mind/spirit, to 'get away from it all' and spiritual renewal.</li> <li>Activities associated with this often include meditation and mindfulness, spa treatments such as massages, yoga, healthy eating and outdoor adventures.</li> <li>The term 'nature deficit disorder' was coined in 2005 by Richard Louv, showing the intrinsic need to connect with nature as a method to restore oneself as being profound.</li> <li>Queensland's clean air, wide open spaces and nature-based health retreats offer the opportunity for formal, organised health and wellness experiences as well as outdoor activities that activate the body and allow for reflection like walking or cycling in the outdoors.</li> </ul>

## EXPERIENCE

## RELEVANCE FOR QUEENSLAND'S NATURE-BASED TOURISM SECTOR

### Adventure

- Adventure travel brings together a mix of nature, culture and physical activity and has been identified as a significant source of growth for the global travel market as we emerge from COVID-19.
- The Spectrum of Adventure experience offering ranges from Extreme Adrenaline to Soft Adventure based on an individual's magnitude and interpretation, determined by:
  - » Perceived risk level
  - » Level of physical activity
  - » Level of adrenaline
  - » Exclusivity.
- Post COVID-19, Queensland can capitalise on the growth of Adventure travel, by meeting evolving consumer needs and appealing to Global Consumer Segments via the Queensland Brand and highlighting our unique nature offering as a core component of Queensland's Adventure proposition
- Adventurous activities that take place in a natural setting are common experiences for nature-based travellers in Queensland.
- Queensland's natural assets often play the key role of access, location and scenic backdrop to these activities, such as white water rafting, sailing, diving, hiking, 4WDing and mountain biking.
- These experiences play an important role of activating the body, creating adrenalin and providing excitement to a holiday.

### Events

- Events are a motivator for travel.
- Events can highlight the natural assets of a destination, which can be used as the backdrop or focus of the event (such as Minjerrabah (North Stradbroke Island) for the Straddie Salute Triathlon Festival) or Woodford Folk Festival.
- Events, in particular participation events, can introduce travellers to new nature-based experiences in the event destination.
- Events that are delivered sustainably and managed with environmental care are in line with the Queensland brand purpose.

### Food & beverage

- Nature travellers are more likely to 'be foodies'.
- While there has been a global food trend towards 'slow food' when dining at home, there has been a similar trend when travelling.
- Visitors are increasingly seeking local, traditional and authentic dishes and drinks that add to a greater understanding of a local culture.
- Culinary experiences that are locally sourced, seasonal, socially responsible and healthy would support the needs of nature travellers, including incorporating food and drinks that connect with travellers through a personalised story or a more memorable and engaging experience.

For international markets, other key drivers (apart from nature and wildlife) for out-of-region travel include safety and security, value for money, good food and wine, friendly citizens and rich history. Australia performs strongly in key priority markets for association with world class nature and wildlife and it is therefore important to connect this to other travel drivers to increase conversion.

- Do you already deliver a nature-based experience/s in one or more of these areas? If so do these insights highlight how you could improve or broaden the appeal of your experience/s?
- Is there an experience activity in the list that interests you and you feel you could expand into to improve the appeal and market reach of your operation?
- Let us know if you think there are experience activities we have missed that would have strong market appeal and help to realise the potential of Queensland's natural and cultural assets?

## 5. The role of the guide

Tour guides play an important role in nature-based tourism. Reviews from travellers participating in nature-based tourism experiences around the world commonly refer to the crucial role that tour guides have in the delivery of the nature-based experience such as:

- sharing valuable information
- being a source of entertainment
- providing safety and security to the tour group
- language translation and cultural explanations
- representing the community as a welcoming local
- sharing expertise in wildlife and flora identification
- sharing knowledge of landscape and environmental interpretation

Queensland has a proud history of championing the development and training of tour guides which is evidenced by the establishment of programs like Savannah Guides in 1988 and the more recent Wet Tropics Tour Guide and Great Barrier Reef Master Reef Guide programs. So while industry and governments have always acknowledged the importance of tour guide training, consumers world-wide are now highlighting the critical role the guide plays in delivering them engaging and memorable experiences. For that reason, industry and government not only need to renew their focus on supporting the ongoing development of tour guiding programs but also ensure the tour guide is front and centre in all marketing and communication activities including social media.

- If you have guides as part of your experience what training have they had, are you and your Guides part of a program like Savannah Guides or Master Reef Guides?
- If you have guides are they accredited with programs like ECO Guide Accreditation?
- If you have guides, do you maximise their marketing and PR potential and profile them on your website or through your social media channels?

### SUPPORTING GUIDES AND HOSTS:

Storytelling Toolkit

ECO Guide accreditation

Savannah Guides

Master Reef Guides

Wet Tropics Guides

Available from [teq.queensland.com](http://teq.queensland.com)



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