

# Promoting the Natural Capital

**A Nature Based Tourism Strategy for the ACT**

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## **Foreword**

Most visitors to Canberra (and many residents) see the city simply as the National Capital, home to politicians, public servants and monumental buildings. However, with over 60% of the Territory in national park, reserve or commercial forest, Canberra is also Australia's 'Bush Capital'. As more and more Canberrans and visitors are discovering, the Territory has a special combination of natural features and characteristics which make it increasingly attractive as a destination for one of the fastest growing segments of the tourism industry - nature based tourism.

The ACT has a wide range of easily accessible and attractive natural areas, including Tidbinbilla Nature Reserve, Namadgi National Park, and Jerrabomberra Wetlands. Each has its own features and together they present significant opportunities for both tourists and residents. To make the most of these opportunities, a long-term strategy is essential. The ACT Nature Based Tourism Strategy provides a framework for developing the local industry to meet the long term conservation, social and economic interests of the ACT community. The Strategy is the first of a number of sectoral tourism strategies intended to promote the Territory in niche markets to complement the Government's overall tourism effort.

This Strategy builds on a number of previous studies and investigations, including an Ecotourism Issues Paper, the Assembly Economic Development and Tourism Committee's Inquiry into the Expansion of Nature Based Tourism in the Territory, the Government's Response to the Inquiry Report, and the ACT Parks and Conservation Service's Marketing Strategy and Options Plan. The Government is grateful for all those who contributed to those studies.

The ACT Government's vision is for an industry which is sustainable, shaped by the Territory's individual character, and offering a variety of satisfying opportunities for residents and tourists to experience the Territory's natural and cultural attractions. The Nature Based Tourism Strategy provides the strategies and actions to achieve this vision.



Gary Humphries  
Minister for the Environment,  
Land and Planning

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# **Executive Summary**

## **Vision for ACT nature based tourism**

The vision for nature based tourism in the ACT is for an industry which is sustainable, shaped by the ACT's unique character, offers a variety of satisfying opportunities for ACT residents and visitors to understand and appreciate the Territory's natural and cultural values, and which leads the way in the region and more broadly across Australia.

## **Context of the Strategy**

The ACT Nature Based Tourism Strategy outlines the vision and policy for the future development of ACT nature based tourism and provides a framework for its planning, development and marketing. Key elements are shown in Figure 1. The Strategy is the culmination of several previous initiatives, including an Ecotourism Issues Paper, an Assembly Committee Inquiry, the Government Response to that Inquiry, and the ACT Parks and Conservation Service's Marketing Strategy and Options Plan. Built on this work and the public consultation undertaken during those exercises, the Strategy seeks to integrate conservation, economic and social goals for growth.

## **What is nature based tourism ?**

Nature based tourism includes all forms of tourism focusing on visitation to natural or near natural areas, including recreation and adventure tourism in a natural setting, ecotourism, rural tourism, visits to European or Aboriginal cultural sites, and simple sightseeing.

## **The market : Demand and supply**

When most visitors think of Canberra, they think of the national capital, politicians and public servants. Many visitors come to the Territory only for short trips to make the pilgrimage to the Parliamentary Triangle and its trio of national icons - Parliament House, the War Memorial and the National Gallery.

But there is another side to the ACT. The Territory has a wide range of natural attractions, conveniently located, serviced by high quality infrastructure, and easily accessible from its major domestic (and international) markets. In fact, just over 53% of the ACT is national park or reserve, certainly the highest proportion of any Australian jurisdiction, perhaps the highest in the world. There are also significant areas of commercial forest, and specialist natural attractions such as the Botanic Gardens and the National Aquarium. However, many of our visitors (and even many of our residents) are unaware of what the Territory has to offer beyond the city limits. By

marketing and promoting our natural attractions we can increase residents and visitors' appreciation of our natural features and the revenue raised through those natural attractions. In addition, simply using the natural attractions to encourage visitors to 'stay another day' can significantly increase the ACT's economic yield per visitor through accommodation, food, drink and other services. Research suggests that for each 1% of ACT visitors who stay one extra day, say to visit Tidbinbilla, the Territory earns about \$1.85 million pa.

### **Management issues**

Even without significant promotion, visitation to natural areas within the Territory is steadily increasing. Naturally, the ACT community will want to ensure that as visitation increases the environment is safeguarded, and that the benefits to the community are maximised. The Strategy aims to encourage the further development of a sustainable industry for the Territory, and includes consideration of key management issues, including integrating tourism and land management, infrastructure development and the respective roles for industry and the government. The Strategy also establishes ten guiding principles to inform and guide further initiatives.

### **Positioning the Territory**

The Strategy establishes a preferred position for the Territory to pursue in further developing nature based tourism. The ACT can't be all things to all visitors (or potential visitors), but should focus on its unique position and strengths. The Strategy proposes further development of the range and diversity of nature based tourism products available in the Territory. Achieving a dramatic increase in visitor numbers is not a central goal of the Strategy, although some increase is anticipated. Instead, the focus will be very much on yield - increasing the economic and other benefits for the Territory, rather than simply increasing visitation.

### **Outcomes, strategies and actions**

Having set a preferred position, the Strategy then establishes six outcomes to achieve that position. These are :

- The Territory's natural and cultural values protected and appreciated by the community and the industry;
- A sustainable and profitable industry, shaped by the ACT's unique character and returning benefits to the community;

Figure 1: Key elements of the Strategy

### **Our aim - what the strategy is for**

To develop nature based tourism in the ACT so as to enhance the long term conservation, social and economic interests of the ACT community.

### **Key issues - what we need to focus on**

1. Environment
2. Positioning in the Market
3. Attractions and Experiences
4. Infrastructure
5. Promotion and Marketing
6. Quality Visitor Services

### **Outcomes - what we're striving to achieve**

1. The Territory's natural and cultural values protected and appreciated by the community and industry
2. A sustainable and profitable industry, shaped by the ACT's unique character and returning benefits to the community
3. An industry offering a wide range of tourist and recreational experiences to residents and visitors, based on market research on both current and potential clients
4. An informed and rational capital investment process
5. Wider recognition locally, nationally and internationally of the ACT as a unique nature based tourism destination
6. Continually improving service standard to ensure high visitor satisfaction

### **Ten guiding principles - to inform and guide our initiatives**

1. Value our natural and cultural resources
2. Use nature based tourism to broaden residents' and visitors' knowledge and appreciation of the Territory's natural environment
3. Plan strategically, and work incrementally
4. Build on our strengths
5. Encourage specialisation
6. Work cooperatively with other stakeholders
7. Encourage a quality approach to products, promotion and customer service
8. A focus on yield, not simply on numbers
9. Ensure that benefits are returned to the resource
10. Learn from experience

### **Strategies and actions - how we'll achieve our outcomes**

9 strategies and 31 actions have been identified

- An industry offering a wide range of tourist and recreational experiences to both residents and visitors;
- An informed and rational capital investment process;
- Wider recognition locally, nationally and internationally of the ACT as a unique nature based tourism destination; and
- Continually improving service standard to ensure high visitor satisfaction.

A number of strategies and actions are then identified to achieve these outcomes.

### **Initial priorities**

The Strategy sets a mixture of short, medium and long term goals for the development of nature based tourism in the ACT. However the ACT Government will, as a first priority, pursue the following initiatives :

- finalise management plans for all parks and reserves;
- undertake a public education / promotion campaign on the existing planning and land management systems;
- improve tourist signage;
- extend current research and information gathering on park and other natural area users;
- increase marketing and promotion of higher yield nature based tourism products;
- investigate further nature based tourism development opportunities;
- further investigate the scope for user charges; and
- with the industry and other stakeholders, develop and implement an appropriate licensing and accreditation system for nature based tourism operators.

### **Feedback**

The ACT Government welcomes feedback on this Strategy. Comments should be directed to :

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## **Introduction**

Tourism is well on its way to becoming the world's predominant industry. The World Tourism Organisation estimates that over 500 million tourists trips are made worldwide each year, and according to the World Tourism and Travel Council tourism and travel together is already the world's largest industry, with an output of \$3.4 trillion, accounting for 10.9 % of world GDP and 212 million jobs<sup>1</sup>.

Tourism is also one of the most important industries in Australia, employing 130, 000 directly or indirectly and generating export earnings of \$10.6 billion in 1993/94. Significantly, while Australia is the thirty sixth most popular tourist destination, it has the third highest receipts per tourist of any country<sup>2</sup>. In the ACT, the industry in 1994/95 had an estimated turnover of \$320 million and was the largest private sector employer in the Territory, accounting for about 9,400 people, or about 7% of the total workforce.

### **Tourism and Nature Based Tourism**

The tourist market is also becoming more specialised and segmented. One of the new and rapidly expanding niche markets is identified by the umbrella term 'nature based tourism'. *Dream green - South Australia's future in ecotourism*, defined nature based tourism as " ... all forms of tourism that rely on or incorporate visitation to natural environments..."<sup>3</sup>. This includes:

- cultural tourism, eg visits to Aboriginal cultural sites;
- rural tourism;
- recreational and adventure tourism in a natural setting, eg cycling, canoeing, sailing;
- simple sightseeing; and
- ecotourism.

'Ecotourism' is generally recognised as a sub-set of nature based tourism. The *Commonwealth Ecotourism Strategy* defined ecotourism as :

" ... nature-based tourism that involves education and interpretation of the natural environment and is managed to be ecologically sustainable, [which] recognises that 'natural environment' includes cultural components and that 'ecologically sustainable' involves an appropriate return to the local community and long-term conservation of the resource."<sup>4</sup>

<sup>1</sup> World Tourism & Travel Council 1995

<sup>2</sup> World Tourism Organisation 1994

<sup>3</sup> Explore International 1993

<sup>4</sup> Allcock et al 1994 : 17

Nature based tourism is of increasing importance both on a world wide basis and in Australia. Although there are issues with the various definitions used for nature based tourism, one study by the US World Resources Institute estimates that what is defined here as nature based tourism is currently worth \$14 billion a year, and is growing at between 10 and 30% per year - or four times faster than traditional tourism<sup>5</sup>.

## **Nature based tourism and conservation areas**

Why is this form of tourism growing so rapidly, and how is it linked to nature conservation areas? There has been an explosion in the number and coverage of conserved natural areas over the last few decades. Since 1970 the number of protected areas has increased by 150 % to 8,100 worldwide. The area in national parks has increased during that same period by 316 %<sup>6</sup>.

Accompanying and assisting this growth has been an increased public awareness of the environment, and an accelerating interest in visiting such areas. In 1993 there were more than 24 million visits to national parks in NSW, up from 13 million in the mid 1980's<sup>7</sup>. As a Wilderness Society spokesperson recently noted "the more we make people aware of the environment, the more they want to see it".

## **Why have a strategy ?**

There are a number of reasons for developing an ACT Nature Based Tourism Strategy, including to :

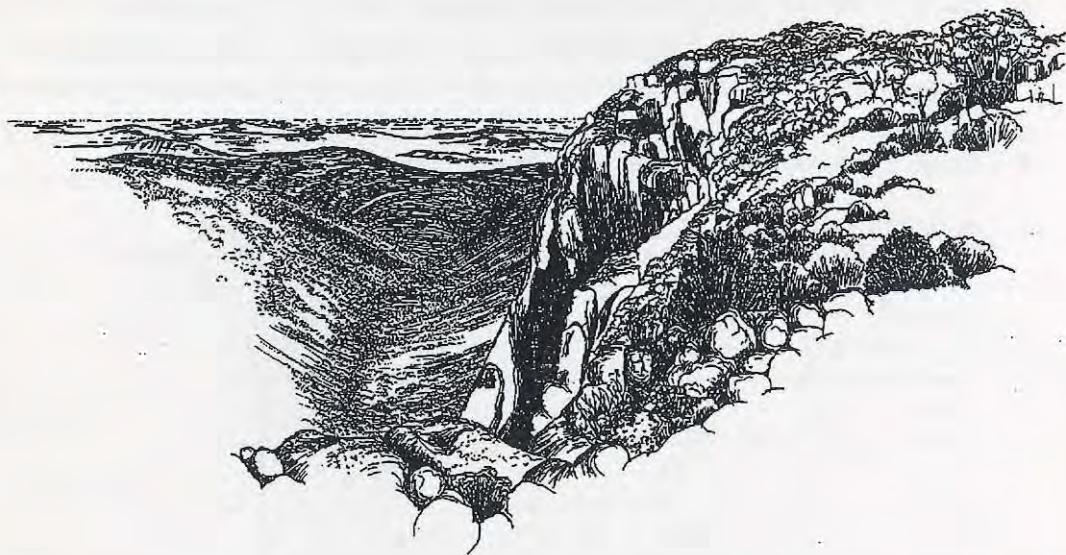
- Recognise the current industry in the context of ACT tourism more broadly, and to link nature based tourism to other tourism sectors;
- Encourage the integration of conservation and nature based tourism development goals for sustainable development of the industry in the ACT;
- Present a proposed position for the Territory as a quality nature based tourism destination, competitive with alternate destinations within Australia; and
- Present a detailed strategic document providing outcomes, guiding principles, specific strategies and actions to achieve that proposed position as a reference point for decision making by ACT Government agencies involved in the development of sustainable nature based tourism in the Territory.

<sup>5</sup> Smith 1994

<sup>6</sup> Eagles 1995

<sup>7</sup> Smith 1994

The Commonwealth released its National Ecotourism Strategy in 1994<sup>8</sup>. Since then many of the other state and territory governments have prepared discussion papers, strategies and other documents to guide the development of this sector of the tourism industry. The more sophisticated of these have treated nature based tourism very much as a niche market in which careful positioning and marketing produces maximum return to stakeholders while conserving the



natural environment. This approach emphasises the importance of having a strategic approach with values guiding industry development and effective partnerships between Government agencies and the private and community sectors.

### **Links to other initiatives**

This Strategy builds on a number of other recent ACT policy initiatives. These include :

- An *ACT Ecotourism Issues Paper*<sup>9</sup>, released by Canberra Tourism in 1994 and subject to extensive consultation with the community;
- the *Marketing Strategy and Options Plan*<sup>10</sup>, prepared by consultants for the ACT Parks and Conservation Service and released in late 1995;
- the Report of the ACT Legislative Assembly Standing Committee on Economic Development and Tourism Inquiry into Nature Based Tourism, entitled *Expansion of*

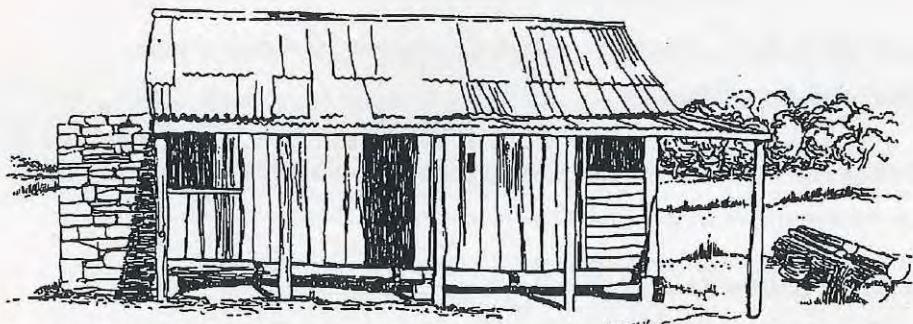
<sup>8</sup> Allcock et al 1994

<sup>9</sup> ACT Tourism Commission 1994

<sup>10</sup> Canberra Public Affairs Consultants, et al 1995

*Nature-Based Tourism in the ACT*<sup>11</sup>, ('the Committee Report') and also released late in 1995. This wide ranging Report made 21 recommendations, on matters ranging from management planning to road signage;

- the *Government Response*<sup>12</sup> to that report, dated May 1996. The Government was able to agree, or agree in principle, all of the Committee's recommendations;
- the *ACT Tourism Development Strategy*<sup>13</sup> released in mid 1996. This document provides Territory level strategies for developing, marketing and promoting tourism in the ACT;
- the ACT and Sub-region Strategy, also released in 1996<sup>14</sup>; and
- the ACT's Strategic Plan 'Canberra: A Capital Future' released in 1996.



<sup>11</sup> ACT Legislative Assembly Standing Committee on Economic Development and Tourism 1995

<sup>12</sup> ACT Government 1996

<sup>13</sup> Canberra Tourism 1996

## **The Demand-side: What do nature based tourists want?**

### **The ACT tourism market**

How important is nature based tourism to the ACT? First, some figures about tourism in the Territory at present. Figure 2 shows that in the year ending March 1995 just over 1.7 million visitors came to the ACT, of which over 84% were domestic, and just under 16% were international travellers. Significantly, the international visitors spent nearly twice as much as domestic visitors per visit, and as a group contributed quite disproportionately to the total visitor expenditure.

Figure 2 : Visitors to the ACT - Origin, Numbers and Expenditure (year ended March 1995)

Origin	Visitor Numbers	Expenditure Total (\$m)	Expenditure AV per head per visit
Domestic	1,440,490	251	165
International	265,462	85	318
Total	1,705,952	330	185

Source: Canberra Tourism

Further research by Canberra Tourism shows exactly where the major markets are for the Territory. About 30% come from Sydney and a further 14% from country NSW, which means that nearly half come from New South Wales alone. With Victoria's further 20%, nearly two thirds of all visitors to the Territory come from our two nearest states. Research on transport modes for visitors shows that mostly visitors come by car.

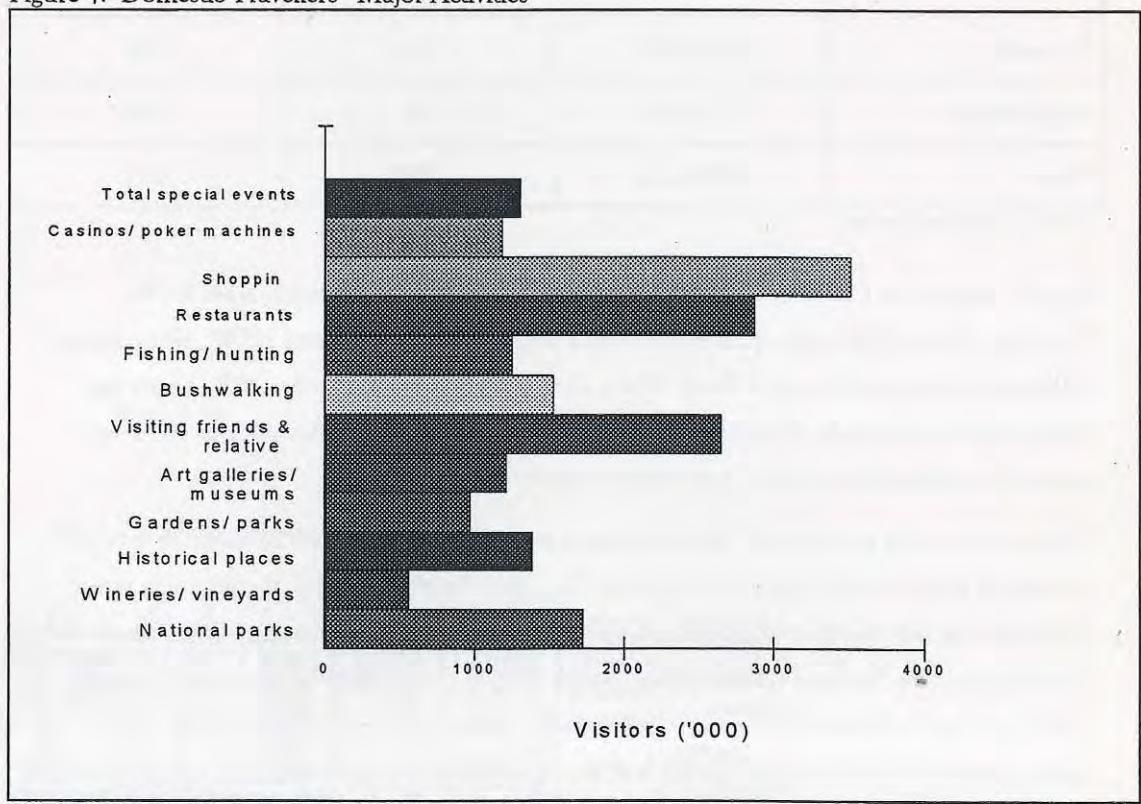
Figure 3 shows the purposes for which visitors come to Canberra. As will be seen, the primary purpose is business; only just over 20% come for a short break or holiday. Significantly, about 14% come to visit friends or relatives, and about 6% come for a specific event, say the latest blockbuster at the National Gallery. These figures show the importance of promotion to make visitors and potential visitors aware of the Territory's nature based tourism attractions - while you're in town for business, a short break or the latest exhibition, come out and see what else there is to experience. They also show the importance of making Canberra residents aware of what the Territory has to offer, in terms of residents promoting our attractions to visitors.

Figure 3 : Domestic visitors to Canberra - Main purpose of visit (year ended March 1995)

Purpose	% of total market
Business	35.9
Visit friends or relatives	14.6
Short break	11.4
Holiday	8.9
Specific event	6.3
Conference /seminar	2.0
Personal	3.2
Other	17.7

Source : Canberra Tourism

Figure 4: Domestic Travellers - Major Activities

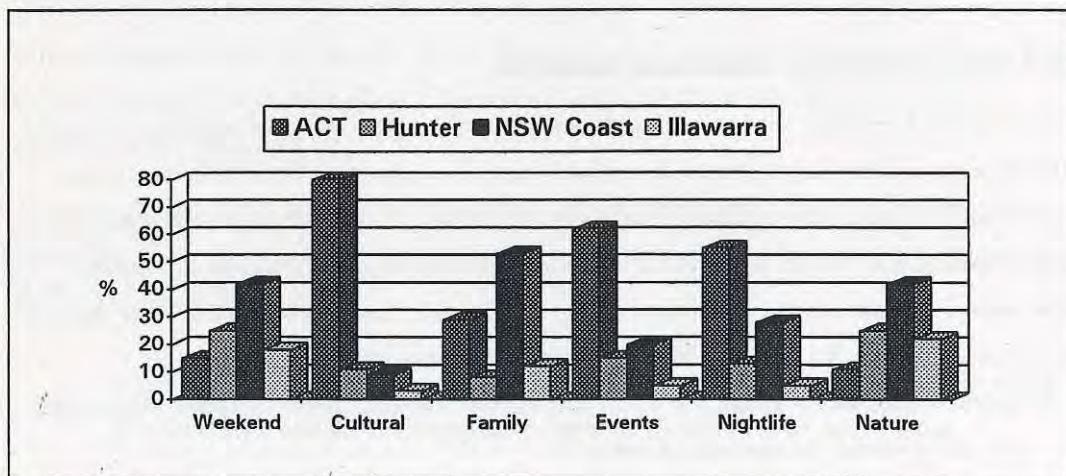


Source: Roy Morgan Research Holiday Tracking Survey - Canberra Tourism

What are tourists looking for ? The results of a recent study by Roy Morgan Research of Australia's domestic holiday market (at least three days away from home) is shown in Figure 4. This work suggests that tourists are looking for a range of activities, from visiting friends, restaurants and shopping, to cultural activities (such as art galleries and historical places) and nature based activities (such as visiting national parks, fishing and bushwalking). Note that the nature based activities are amongst the most sought after experiences.

Which destinations do residents of our major markets think of when they consider a holiday ? Figure 5 shows the results of research done on our major market - Sydney, and indicates Canberra has competitive strengths as a cultural and an event destination. Against its competition in that market, it even has strengths as a 'nightlife' destination. However, the Territory is not strong in the weekend and nature based markets.

Figure 5: Best Places for a Holiday - Sydney Residents



Sourcé : Canberra Market Monitor; December 1995

Which specific attractions in Canberra draw these visitors ? Overwhelmingly the national icons. The first ten in order of decreasing visitation are - Parliament House, the War Memorial, the National Gallery, Telstra Tower, National Library, the Australian National Botanic Gardens, Regatta Point, National Science Centre, High Court and the Mint. Tidbinbilla is the first 'Territorial', attraction at number 12.

As noted above, further qualitative research undertaken in the Territory's major market shows that visitors aren't aware what Canberra can offer for nature based tourism. However, when described, focus group members have shown considerable interest in the nature based tourism attractions the ACT has to offer - especially Tidbinbilla and Namadgi National Park<sup>15</sup>.

<sup>15</sup> Canberra Public Affairs Consultants et al 1995

In summary, the research described here shows :

- most ACT visitors are domestic (especially from Sydney), and are travelling by car;
- domestic travellers look for a range of experiences, and nature based experiences are amongst the most sought after. This suggests opportunities exist for packaging nature based with other tourist experiences;
- Canberra is seen as a significant cultural destination, and visitation is currently highest to the City's cultural attractions. This suggests the benefits of partnerships - in particular linking nature based with cultural attractions; and
- there is a limited knowledge of the ACT as a nature based tourism destination, but when described, there is considerable interest in the types of nature based experiences the ACT has to offer.

### **The nature based tourism market**

Given a range of activities, tourists may move in and out of a particular market segment, say nature based tourism activities, several times during the course of a single trip. Thus there is no single 'nature based' tourism market, rather market segments flowing into one another as tourists seek a range of experiences. While nature based tourism is primarily about the *experience* of nature, some tourists are interested in white water rafting or mountain climbing, while others just want to have fun and get away from it all<sup>16</sup>. Market research shows that while there is a range of demographics, a significant proportion of the nature based tourism market comprises people aged 30+ with above average income and education<sup>17</sup>.

Even considering those nature based tourists who choose more traditional nature based activities, there is a clear preference for experience gained with limited exertion. For example, the 1994 Tasmanian Visitor Survey showed that 55.1 % of Tasmanian visitors went 'bushwalking'. However, 64.2% of those 'bushwalkers' went for walks of less than 2 hours in length and only 5.3% of all bushwalkers went for walks lasting overnight or longer, in a state renowned for its World Heritage Areas and natural attractions<sup>18</sup>. In fact a further study of visitors to these areas asked respondents 'what did you get out of your visit ?' . The first eight responses in order were scenery/beauty; relaxation; tranquillity; recreation; get away from it all; enjoyment; back to nature and exercise. 'Wilderness' came in ninth at 1.5% of respondents<sup>19</sup>. Many such studies emphasise

<sup>16</sup> Blamey 1995

<sup>17</sup> Blamey 1995

<sup>18</sup> Department of Tourism Sport and Recreation 1994

<sup>19</sup> Hocking 1994

that there is a strong demand for nature holidays to attractive scenic locations, which are not too physically intimidating, and suitable for families<sup>20</sup>.

### **Value of the existing industry**

At present, the parks return only minor direct revenue from the Namadgi and Tidbinbilla Visitor Centre shops (in the order of \$20,000 per year), charging for some ranger-guided walks, and revenue from campers at Murrumbidgee River Corridor. However, even without direct financial returns from the parks, they are major contributors both financially and otherwise to the Canberra community. Some of the economic benefits include the value of visitors staying another day in the ACT as a result of visiting the parks and other natural areas of the Territory, and the value of the parks as a source of cheap water for the city.

Recent research shows that 1.95% of tourists to Canberra went to Tidbinbilla as part of their stay (a minimum of 34,942 in 1993 / 94). With average expenditure per person of \$53 per day, if each of these tourists stayed one extra day to visit Tidbinbilla, then this activity alone would be worth up to \$1.85 million per annum to the ACT economy, even more if the multiplier effects of this expenditure were included<sup>21</sup>.

There are also non cash 'amenity services' provided by national parks. These are benefits, often intangible, which are valuable to those enjoying them, but which are difficult to cost or to charge for<sup>22</sup>. These include :

- amenity - the value to individuals of having the parks for private recreation. This would be particularly relevant for those using Canberra Nature Park for say, walking;
- aesthetic - the value to individuals and the community at large of having the parks providing a green and attractive backdrop to the city;
- existence - the value of simply knowing that there is a wilderness in Namadgi National Park, even if one never visits it.

<sup>20</sup> Preece et al 1995 : 32

<sup>21</sup> Canberra Public Affairs Consultants et al 1995

<sup>22</sup> Driml and Common 1992 : 21

## **The Supply Side: the ACT's Natural Advantages for Nature Based Tourism**

### **Canberra - the natural capital**

The ACT has one of the largest park and reserve systems in the world, in terms of percentage of area covered. Over 53% of the Territory's area of about 2,400 sq km is contained in national park or nature reserve, and a further 10% is contained in pine plantations and related land managed by ACT Forests. The parks are managed by the ACT Parks and Conservation Service as a number of separate reserves :

- Tidbinbilla Nature Reserve, containing wildlife enclosures and an extensive walking trail system;
- Namadgi National Park, covering the mountainous part of the ACT and containing a wide range of natural and cultural features and recreation opportunities, as well as providing water catchment and storage for much of Canberra's water supply;
- Murrumbidgee River Corridor, which follows the path of the river through the ACT provides opportunities for walking, picnicking and water based activities such as swimming, kayaking and canoeing;
- Canberra Nature Park, which includes the hills and ridges in and around the city and provides opportunities for walking and sightseeing within or near the city. Also includes Jerrabomberra Wetlands, an outstanding bird watching location; and
- Googong Foreshores, located in NSW and providing catchment protection for the Googong Reservoir as well as many activities including fishing, sailing, walks and canoeing;

The location of the parks is shown in the accompanying map, and some statistics on area and visitation are shown in Figure 6. Further information on the individual reserves is included in Appendix A.

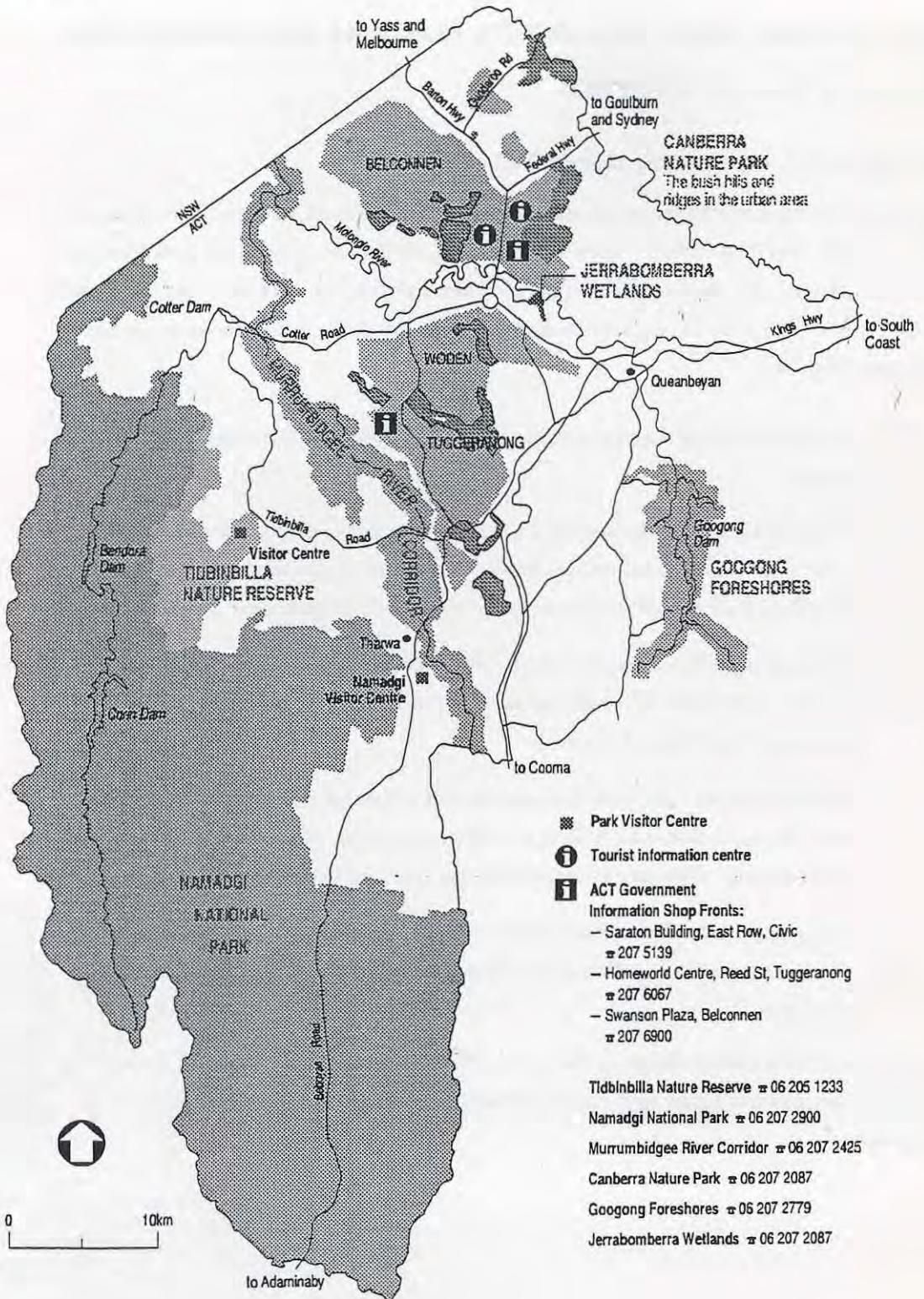


Figure 6 : ACT parks and reserves - visitor numbers and human uses

Name	Area (ha)	Visitors per year	Primary human uses
Namadgi National Park	105,900	130,000	bushwalking, camping, wilderness research
Tidbinbilla Nature Reserve	5,450	160,000	native animals, walking trails, research
Murrumbidgee River Corridor	6,990	970,000	picnic ground, walking trails, water based recreation such as swimming, boating
Googong Foreshores	4,900	63,000	fishing, walking,
Canberra Nature Park	5,000	ca 1.5 m	recreation, walking trails, research
Totals	127,800	ca 2.9 m	

As seen in Figure 6, visitation varies significantly across the parks and reserves. While there are seasonal and other reasons for this variation, the primary factors are believed to be knowledge (or lack of it) of the various reserves, proximity to the city and ease of access. The closest and most easily accessed parks - Canberra Nature Park and Murrumbidgee River Corridor, have the highest visitation, while the more distant parks, Tidbinbilla and Namadgi, have significantly fewer visitors.

The planned nature and development of the city has created opportunities for the development of tourism and recreation uses in particular locations. For example, the Jerrabomberra Wetlands resulted from flooding of low lying land, previously used as a garbage dump for Kingston, as Lake Burley Griffin was filled in the mid 1960s. With the inundation came an opportunity to create a significant conservation area for waterbirds and other animals.

Similarly, much of the lower slopes of Black Mountain was originally cleared for timber and used for grazing. A decision in the first years of the city to fence it off as a reserve has enabled regrowth to create the now thickly wooded Black Mountain Reserve section of Canberra Nature Park.

Again, the Cotter catchment (now part of Namadgi National Park) was originally reserved to ensure pure drinking water for Canberra. Further opportunities are expected with the

conservation of native grasslands at sites within the Territory, including near the proposed Gungahlin Town Centre.

Within reserves, developments have taken place as recreation opportunities have been recognised, such as rock climbing at Booroomba Rocks in Namadgi National Park, and equestrian trails at Mt Ainslie in Canberra Nature Park.

## **Where are we now ? The current industry**

Private sector nature-based tourism is already underway on a small scale in the ACT. About 14 private operators provide bus and 4WD tours through the parks and reserves; many are members of the local Canberra Region Tourist Operators Association. Most of these are sole traders, or small businesses, and operate on a day by day demand basis. This is consistent with interstate experience, which characterises the nature based tourism industry as :

- young, and so not well organised (unlike mass tourism);
- comprising small companies generally created by enthusiasts and experts in conservation and education; and
- labour and knowledge intensive<sup>23</sup>.

In Tasmania, for example, the 'typical' operation was between three and four years old, had nine employees during the peak operating season, had about 500 clients annually, in groups of between 2 and 13, and operated from a city or regional centre<sup>24</sup>. The 'Green Jobs' study also found that 87% of nature based tourism firms employ less than 20 people<sup>25</sup>.

While the private sector is at present quite modest, the public sector is much larger. The largest public sector operator is the ACT Parks and Conservation Service. The Service undertakes a number of activities, including :

- ranger guided walks, attracting about 30,000 people a year for a variety of activities; including topics in ecology, fauna and flora, water catchments, geology, European and Aboriginal history, fire and conservation;
- other ranger assisted interpretive activities, such as talks to special interest groups; and
- supplying rangers and technical staff for commercial tour operators' activities in the parks.

<sup>23</sup> Preece et al 1995

<sup>24</sup> Forestry Tasmania 1994a : 16

<sup>25</sup> Australian Conservation Foundation / Australian Council of Trade Unions 1994 : 173

These activities provide significant benefits through education of visitors on conservation issues, the fostering of appropriate environmental values, and (from August 1996) some revenue for the Parks Service. In a recent ACT Parks and Conservation Service (ACTPCS) survey 92% of Canberra residents would recommend Tidbinbilla Nature Reserve to visitors from interstate. The parks are also appreciated within the industry : Tidbinbilla won the ACT Tourism Award for environmental tourism for three years running (1993 - 95).

The Australian National Botanic Gardens, located on the slopes of Black Mountain, house one of the world's finest collection of Australian native plants. An educational program is available and self-guided tour packages are available for the Aboriginal Trail and White Arrow Trail. The Gardens currently attract a significant proportion of visitors to Canberra.

ACT Forests is the principal plantation forest owner and operator in the Territory, and manages 26,900 ha of ACT rural land. Of this about 16,000 ha is commercial pine plantations, with the remainder consisting of native vegetation. ACT Forests has a number of camping areas and huts as well as barbecue and picnic areas. The forests are important as a nature based tourism focus, attracting major sporting events such as the Asia Pacific car rally championships, national mountain running and national and international mountain bike championships. These forests are of particular importance in that some of these recreation opportunities are not available in conservation areas, such as archery, car rallies and other sporting events. In this way the forests also take some visitation pressure off nature parks. ACT Forests also manage over 1000 cultural sites including historic and Aboriginal sites, as well as several arboreta. Several of the historic sites are included in walks or camping areas.

While tourism within forestry areas is further developed in other jurisdictions where there is more extensive native forest and a wider ambit of responsibility<sup>26</sup>, ACT Forests is engaged in further expanding its trails, camping and recreation uses for tourists and other visitors.

There are a small number of not for profit community organisations which also operate within the 'industry', providing guided walks in and around the ACT region.

Finally, a small but potentially important segment is rural tourism. The Commonwealth's National Rural Tourism Strategy defines rural tourism as a "country experience - [including] rural resorts, rural attractions, farm stays and other styles of country accommodation, country festivals and events and agricultural education"<sup>27</sup>. At present three ACT rural lessees are active in providing farm visits, generally for overseas visitors and arranged through tour operators. Further such opportunities are being explored in a regional context under the ACT and Sub-region Strategy.

<sup>26</sup> eg Tasmania - see Forestry Tasmania 1994 a and b

<sup>27</sup> Department of Tourism 1994 : 1

## **Management Issues**

There are a number of management issues which need to be addressed before turning to the question of developing a marketing position for the Territory.

### **Sustainable Development : Integrating tourism and land management for conservation**

While most nature based tourism is now concentrated in national parks, wildlife reserves and similar types of protected areas, research shows that the management philosophy of parks agencies and visitors' motivations are often very similar. Park agencies aim to manage the parks and reserves for conservation, and visitors come to have a quality experience, close to the natural environment without damaging it<sup>28</sup>.

However, in some cases environmental values have been sacrificed for 'development' where large financial returns have been promised. This has resulted in a polarisation of views in the community and negative impacts for both tourism and 'development'.

Recently, more sophisticated concepts such as Ecologically Sustainable Development (or ESD) have been developed which can indicate ways to integrate conservation and tourism - for tourists to use natural environments while contributing significantly to their conservation. The ESD Working Groups Report on Tourism, for example, suggested that ecotourism is a situation where 'the idea of a symbiotic relationship between environment becomes most apparent', and developed a set of characteristics of ecologically sustainable tourism based on operating within the biophysical limits of natural resource use; maintaining intergenerational equity; and maintaining existing biodiversity and ecological systems and processes<sup>29</sup>.

The ACT's suite of natural areas forms, at a local level, a response to the National Strategy for Ecologically Sustainable Development (ESD) objective for a national conservation system :

*"to establish across the nation a comprehensive system of protected areas which would include representative samples of all major ecosystems, both terrestrial and aquatic; manage overall impacts of human use on protected areas; and restore habitats and ameliorate existing impacts such that nature conservation values are maintained and enhanced"<sup>30</sup>.*

<sup>28</sup> Eagles 1995 :3

<sup>29</sup> ESD Working Groups Report on Tourism 1991

<sup>30</sup> Commonwealth of Australia 1992 : 54

In aiming to conserve the ACT's natural and cultural resources, the Parks and Conservation Service has prepared or is preparing management plans for each of the parks and reserves. It is urgently pursuing finalisation of these plans.

Regional cooperation between the ACT and surrounding NSW national parks and local government areas is important for functions such as fire fuel management, cooperative efforts for conservation of threatened species and management of ecosystems. The ACT Government seeks to work with these and other stakeholders to advance these goals, while also promoting appropriate economic activity through such means as the ACT and Sub-region Strategy.

## **Industry and Government roles**

Integration of conservation and tourism suggests there are distinct but complementary roles for industry and government. One authority has noted that "the long term success of nature based tourism requires cooperation of the public and private sectors."<sup>31</sup>.

What then are the respective roles for each? Industry should operate so as to provide quality products to meet consumer expectations and consistent with the parks management's conservation and education messages. Operators should also market products accurately. In other jurisdictions, operators have jumped on the bandwagon so that there is now a multitude of 'nature based tours', and 'ecotours' of varying quality.

Governments have a number of roles, including providing a wide range of managed settings within a region; information at various levels about the nature resource and management practices; infrastructure provision; and education and training in interpretation of the natural environment.

However, Government also has a number of key leadership and regulatory roles. These include providing protection for the environment; assisting tourism industry development and improving approaches to planning; monitoring impacts and setting the limits of acceptable change; and supporting education, research and training through licensing and accreditation<sup>32</sup>. The Parks and Conservation Service, with the industry and other stakeholders is pursuing this role through a number of measures including the development of licensing and accreditation systems for operators.

In a time of fiscal restraint and with greater emphasis on user pays principles for government services, a further role is to carefully evaluate and introduce where appropriate revenue measures.

<sup>31</sup> Eagles 1995 : 11

<sup>32</sup> Preece et al 1995

Resource rent and user fees were raised by the ACT Parks and Conservation Service in its Marketing Strategy and Options Plan. Charges have been introduced for some ranger guided activities, and further work is being done on a number of other possible revenue measures, including the issue of park entry fees.

## **Infrastructure**

One of the most controversial elements of nature based tourism developments in other jurisdictions and overseas has been the issue of infrastructure - the roads, hotels, and other facilities required to transport, house and service tourists while accessing and visiting natural areas.

It is important to note that except in wilderness areas there is always some form of development in parks and reserves, and that unacceptable impacts may occur within parks even without 'development', eg through pest plant and feral animal infestation.

Development in parks may range from the very simple to the more complex, and for several purposes :

- park management eg toilets, car parks, signage, campgrounds, boat ramps, and barbeques/ picnic areas, cafes;
- access to areas by roads, walking, horse, bike or ski tracks, etc; and
- other government agencies' use, eg utility easements, telecommunications equipment, and access roads to such facilities.

There is at present little commercial development within the ACT parks system. However, proposals have arisen in the past for :

- small scale accommodation such as cabins or a guesthouse / lodge;
- meeting / conference facilities; and
- food / drink facilities.

Any proposal for development within or around the parks (indeed anywhere within the Territory) is subject to the existing ACT planning system, based on a leasehold system of land tenure and a statutory planning system. This provides for a multi layer planning regime - National Capital Plan, Territory Plan, then Management Plans either in place or in development for the specific parks and reserves. Further detail on this system is provided in Appendix B.

In responding to the Legislative Assembly Tourism Committee Report on this issue, the Government reiterated that any proposals for development will need to meet the requirements of the Territory Plan and the National Capital Plan.

In other jurisdictions there has been considerable debate about whether it is better to have development outside the parks to retain the integrity of the park, or inside to ensure closer control and perhaps some financial return. Thus external siting may be seen to retain the integrity of the parks. But on the other hand, critical mass is important; having existing visitor centres in the parks, it may be appropriate to have other facilities such as a coffee shop or retail facility adjoining. Often such arguments are less about location than about appropriate planning and operation of facilities. Many criticisms made about the provision of facilities such as hotels and resorts are that they do not reflect, respect or relate to local characteristics and ecosystems<sup>33</sup>.

In responding to the Assembly Committee Report, the Government agreed that formal accommodation developments would be restricted to the periphery of the parks. The Government also announced that an education / information campaign would be mounted to advise the community and the tourism industry of the existing planning system covering development within the Territory<sup>34</sup>.

The Committee addressed further infrastructure issues, with recommendations (agreed by the Government in its Response) for further exploration of the possibilities for additional food services along Tourist Drive 5 or in Tidbinbilla Nature Reserve. It also recommended the Government consider mid to long term plans for existing buildings on public land in the bush parks such as Gudgenby Homestead<sup>35</sup>, which the Government has agreed to do<sup>36</sup>. There may be other opportunities available for consideration in this regard, eg Birrigai Outdoor Education Centre.

Finally, it should also be noted that the ACT is particularly fortunate in that its size and compact nature means that any spot in the Territory is at most an hour from the city and already established accommodation and other facilities. Moreover, the rural and natural areas are serviced by high quality roads, again making travel easy and quick. These factors should reduce the need for development, particularly accommodation in sensitive and protected areas.

<sup>33</sup> Bull 1992

<sup>34</sup> ACT Government 1996 : 6

<sup>35</sup> ACT Legislative Assembly Economic Development and Tourism Committee 1995; ACT Government 1996 : 4,11

<sup>36</sup> ACT Government 1996 : 4

## **Positioning the Territory**

This section develops a preferred market position for the ACT industry by, firstly, presenting a modified 'strengths / weaknesses / opportunities / threats' (SWOT) analysis of the Territory's current position in the Australian industry, secondly considering some of the important issues raised by that analysis, and finally presenting the proposed position. The means for achieving that preferred position will then be analysed in the next section.

### **A modified SWOT analysis**

Rather than the traditional opposites SWOT model, a modified version using 'strengths / constraints' and 'competition / opportunities' is utilised. This is because every issue considered, eg the Bush Capital image, can be seen in terms of strengths, constraints, competition and opportunity.

#### **Strengths : The ACT's special characteristics for nature based tourism**

Canberra is unique amongst Australian cities, and the distinctive character of the city is related to its natural background setting. The specific strengths of Canberra for nature based tourism include :

- Canberra - 'the Bush Capital'. The city has a strong national, perhaps international, image as the 'Bush Capital'. This image enhances the appeal of the city's built attractions by providing a scenic backdrop to the urban area;
- Wide range of ecosystems in a small geographical area. As noted above, the ACT has a suite of ecosystems, ranging from sub alpine through forest and grasslands to riverine systems and wetlands, all in a small and compact Territory;
- Proximity. Canberra's parks, reserves and forests are close to a major Australian city - within 30 minutes drive all of the Territory's parks and reserves can be accessed. Canberra itself is close to major tourism markets in Sydney and Melbourne;
- Access. Visitors have very easy and convenient access to the parks, especially to Canberra Nature Park. Almost all are via high quality sealed roads, even within some reserves (eg Tidbinbilla);

- A related factor is the grouping of many of the Territory's attractions - Tourist Drive 5 runs through or by most of the prime nature based tourism attractions, including Canberra Nature Park, Murrumbidgee River Corridor and Tidbinbilla, as well as several ACT Forests areas, Mt Stromlo, the Tidbinbilla tracking station and Lanyon. Cuppacumbalong and other art and craft centres adjoin the Drive at Tharwa Village;
- Wildlife encounters. The ACT parks system is managed to provide easy access to wildlife, including the archetypal 'Australian' species such as the kangaroo and emu. Particularly at Tidbinbilla, many animals are easily accessible, yet presented in a natural setting;
- Includes threatened species. Some parks contain a number of plant and animal species and ecological communities which are vulnerable, endangered or under threat of extinction;
- An educated, environmentally aware population. Canberra has a large, well educated population which has shown itself to be both aware and active in a range of environmental issues, and enthusiastic users and contributors to the natural environment; and
- Fine planning control over land uses. Canberra's leasehold land tenure system, integrated management planning and history of service management provides for sophisticated control over land uses in and around the parks and reserves.

### **Constraints**

Each of these strengths is also to some extent a constraint for further tourist development :

- Proximity of Canberra to the major Australian gateways of Sydney and Melbourne (and a lack of knowledge of the ACT's attractions) means that most interstate and international visitors spend only a short time in the national capital<sup>37</sup>;
- Ease and convenience of access means that to some extent the parks are taken for granted. Even within the Territory, the image of the parks seems to be primarily linked with recreation uses. Staff experience is that the overwhelming majority of local visitors use the parks and reserves for recreation functions such as picnics, barbecues, exercise, or sport;

- Again, the visitation figures show a pronounced 'funnelling' of local visitors into parks with the easiest access - Canberra Nature Park, Murrumbidgee River Corridor, and to some extent Tidbinbilla. Perhaps this is based on habit, but it also indicates a limited awareness of the full range of areas and experiences available;
- The primary conservation and water catchment functions of the parks also brings with it severe constraints on activities (particularly building development) within the park boundaries, and perhaps in the adjoining areas. Thus there is competition between some uses. This may mean that nature based tourism (like all other uses) is appropriate for some areas, and not for others;
- The existing commercial and non commercial industry is small, and comparatively underdeveloped at present; and
- The available resources for development of the product, and marketing and promotion are small compared to other jurisdictions.

### **Competition**

- Competition from markets in Sydney and Melbourne and higher profile markets in warmer areas;
- Greater resources for marketing in the other states and the Northern Territory;
- The industry is larger in other jurisdictions; and
- There is strong regional competition for tourism opportunities, eg for rural tourism.

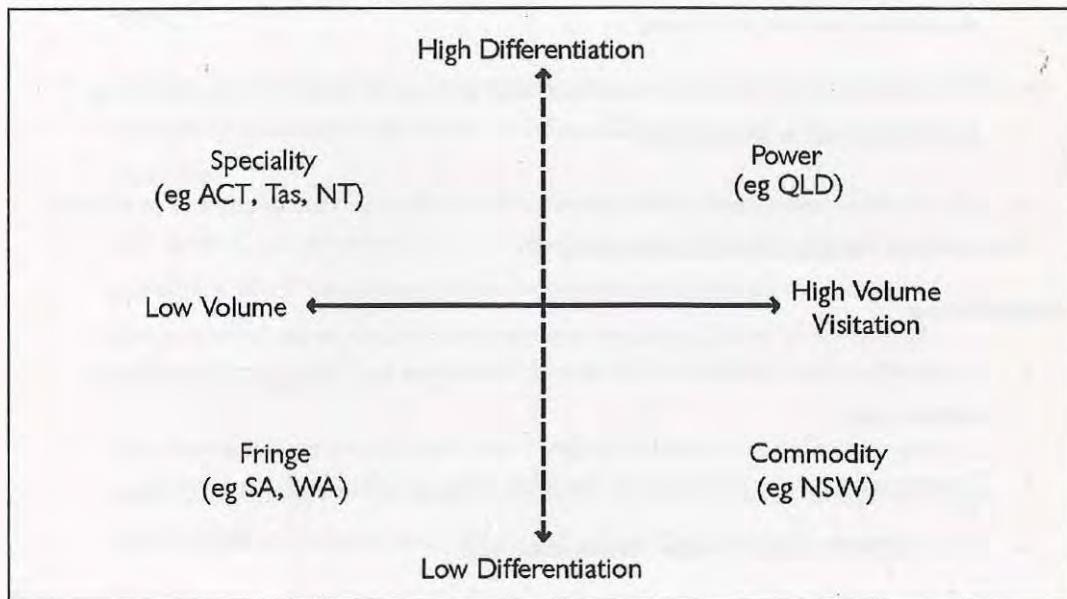
### **Opportunities**

- Research shows that there is a significant potential for development of the ACT industry;
- The industry can provide a further valuable avenue for developing an appreciation of the conservation values of the Territory's natural environment in both local residents and visitors; and
- Opportunities for partnering and added value trips, eg packaging of nature based tourism opportunities with existing marketing based on Canberra's built icons.

## **Developing a market position**

One means of presenting a market position is shown in Figure 7. This chart is schematic only, but attempts to present market position as a position on a graph which has dimensions showing volume of tourists and degree of differentiation, or market segmentation. The ACT is seen as occupying a position in the top left hand quadrant - a speciality destination with some differentiation and modest tourist volume.

Figure 7 : Developing a Marketing Position

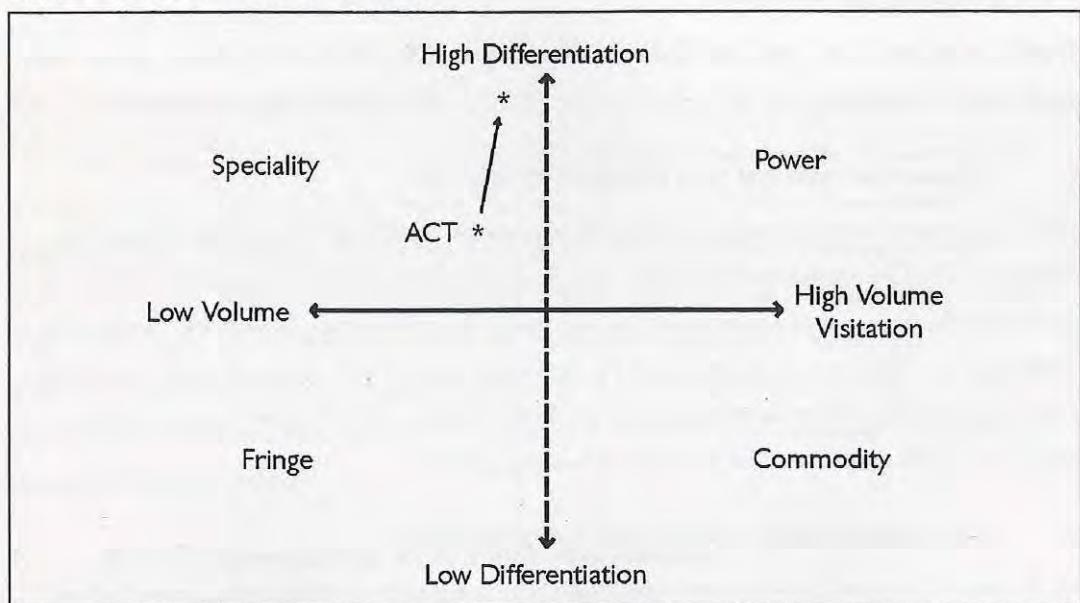


Source : Adapted from Tourism South Australia (1990)

There is considerable movement amongst the various destinations. NSW, for example, is seeking to further differentiate its market segment appeal through devices such as the 'Seven Wonders' media campaign.

Given the earlier discussion on the ACT's current position, characteristics and values, it is proposed that the Territory continue to develop along its current track - further product and industry development to further differentiate our Territory as a destination and as a supplier of unique products or packages of products, with modest increases in tourist numbers and a significant increase in yield from visitors. This is illustrated in Figure 8.

Figure 8 : A Proposed Market Position



Source : Adapted from Tourism South Australia (1990)

How would this work ? The preferred approach is to market the ACT as a nature based tourism destination to those who :

- have an interest in gentle to moderate outdoor sightseeing, tourism and recreation;
- have a shared interest with cultural features and who would be attracted to the idea of a multi themed holiday; and
- desire a high level of comfort and quality accommodation, restaurants and supporting tourist infrastructure.

Within this group there appears to be considerable scope to extend the average length of stay through alerting people to the possibilities of nature based activities in the surrounding region by emphasising the image of Canberra as the 'Natural Capital', or the 'Bush Capital'. This will require subtle changes in the marketing of Canberra as a whole but also more targeted measures such as better marketing of individual sites, product packages and service providers. Specific actions to achieve these changes are discussed in the following sections.

This combination of natural and national features should also make Canberra a more significant attraction for visiting school groups.

## **Ten guiding principles**

The following principles have been identified to provide a guide in further developing nature based tourism in the Territory :

### **1. Value our natural and cultural resources**

The Government has as a primary concern the conservation of the ACT's natural and cultural resources. The Government will therefore work to ensure that conservation is a primary factor in the further development of nature based tourism, using the principles of Ecologically Sustainable Development. This is not only important for the environment, but is also good business; indeed, a clear message from other jurisdictions and academic research is that visitors' expect to visit a natural or nearly natural area for their nature based experience.

### **2. Plan strategically, but work incrementally**

Most successful nature-based tourism operations (whether private or public sector) have defined their strategic goals, while building on success by working in incremental steps. Planning strategically allows for a holistic approach to industry development, while working incrementally allows for small steps to be taken sequentially. This means smaller investments, less risk and the ability to learn from mistakes while there is still time to take corrective action if required.

### **3. Build on our strengths**

A key element in setting strategic goals is the deliberate and considered choice of which markets to pursue, and which not to pursue. The ACT has clear advantages in the market, but we cannot be all things to all people. One commentator has used the following "...[managing] tourism is like having people to dinner. You don't have to fling the doors open and take on all comers. You can decide who you want to come and focus specifically on them. And, if too many guests arrive, you can limit the numbers"<sup>38</sup>.

### **4. Broaden residents' and visitors' knowledge of the ACT's natural environment**

One of the key benefits of nature based tourism is that it can be used to increase visitors knowledge and understanding of the natural and cultural environment. At present visitation is focused on a few favoured sites in a few parks, eg picnic and barbecue areas in Murrumbidgee River Corridor. The Government will work to broaden visitors' knowledge of the range of sites and attractions within the parks system. Further work can be done to broaden the contributions being made or

that are possible from other 'green' areas within the Territory - the non park rural areas, the forest and the urban green spaces.

## **5. Encourage specialisation**

The Government will encourage some elements of specialisation based on the characteristics of particular parks or locations within parks, and their ability to handle either the numbers or types of visitation. Thus Tidbinbilla will continue to be promoted as the primary location for more leisurely nature based tourism such as visiting the animal enclosures and walking trails. On the other hand, Namadgi will be reserved primarily for lower impact activities focusing on the wilderness aspects of the park. Areas managed by ACT Forests while also providing for soft nature based tourism activities, can provide for other recreational uses not suited to conservation areas, including car rallies.

## **6. Work cooperatively with other stakeholders**

Given that the parks and reserves will continue to be the primary focus for nature-based tourism, the Government will continue to be a major stakeholder in the industry. This will include working with other stakeholders such as industry and community groups to ensure a sustainable, profitable and long term industry in the Territory. Government involvement will also help ensure that conservation values remain paramount.

## **7. Encourage a quality approach to customer service, products, and promotion**

A clear message from other jurisdictions is that visitors want high quality, environmentally friendly services and products. They also want to get what they've seen advertised and paid for. A key principle for the industry is product development and marketing which emphasises quality and integrity.

Little comprehensive market research has been done in relation to ACT visitors' wants and expectations in nature based tourism. The Government will increase the priority given to visitor surveys and site monitoring, where possible working in conjunction with other organisations to maximise the use of available resources.

## **8. A focus on yield, not necessarily on numbers**

A clear issue for the community, the Government and the industry is the impact of increasing numbers of visitors on the resource and the enjoyment of both residents and visitors of the Territory's natural and cultural resources. However, we are also aiming for an efficient and

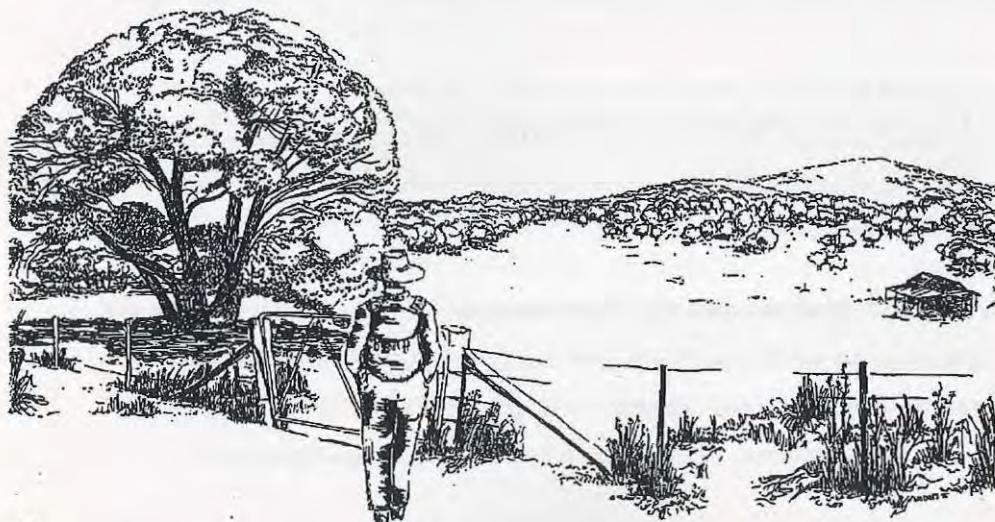
profitable industry which can return increasing benefits to the community. One response is to focus on the yield from each visitor, rather than simply increasing the number of visitors.

#### **9. Ensure that benefits are returned to the resource**

Studies in other jurisdictions, and market research undertaken locally, have shown that most visitors or potential visitors are quite willing to pay for the enjoyment of parks and value added services when they know that such contributions are being returned to the park system. New financial arrangements introduced by the ACT Government means that such a commitment can now be given to park users in the ACT.

#### **10. Learn from experience**

A key element in managing the future growth of the nature based tourism industry is the need to develop and implement monitoring programs in natural areas. Current land planning and management controls provide significant protection in this regard, but we will need to do more in monitoring impacts. The ACT, coming late to formal development of nature based tourism can also learn from the experiences of the other states and territories and from overseas.



# **Mission, outcomes, strategies and actions**

## **Mission**

The Government's vision for nature based tourism in the ACT is for an industry which is sustainable, which is shaped by the ACT's unique character, which offers a variety of satisfying opportunities for ACT residents and visitors to enhance their knowledge and appreciation of the Territory's natural and cultural values, and which acts as a positive example throughout Australia and overseas.

The mission for the ACT Government in achieving this vision is to *encourage nature based tourism in the ACT so as to enhance the long term conservation, social and economic interests of the ACT community.*

## **Key outcomes**

This Strategy has identified a number of key outcomes the Government needs to focus on with the industry, the community and other stakeholders to achieve its mission. These are :

- the Territory's natural and cultural values protected and appreciated by the community and the industry;
- A sustainable and profitable industry, shaped by the ACT's unique character and returning benefits to the community;
- An industry offering a wide range of tourist and recreational experiences to both residents and visitors;
- An informed and rational capital investment process;
- Wider recognition locally, nationally and internationally of the ACT as a unique nature based tourism destination; and
- Continually improving standard of service to ensure high visitor satisfaction.

## **Strategies and actions**

To achieve the above outcomes, the following strategies and actions are identified.

**Outcome 1 : The Territory's natural and cultural values protected and appreciated by the community and the industry**

Strategy 1.1 : Work to integrate conservation and tourism so as to conserve and enhance the existing environmental values of settings for nature based tourism

- Action: ACTPCS to complete management plans for all reserves as soon as possible.
- Action : ACT Government to manage resources in a manner which ensures that existing legislative requirements are met by land management agencies and other service providers.
- Action: ACT Government to manage group users of nature based tourism settings to ensure low impact operation through such actions as the development and implementation of effective systems of licensing and accreditation.
- Action: ACT Government to work towards establishing well developed links between environmental monitoring, policy reviews, day-to-day management activity, and promotional and educational activity.

Strategy 1.2 : Information and education programs for local residents and visitors on the Territory's natural and cultural features.

- Action: Ensure ACT residents and visitors are aware of local nature based opportunities through an ongoing awareness / educational program.

**Outcome 2 : A sustainable and profitable industry, shaped by our natural resources' unique character and returning benefits to the community**

Strategy 2.1 : Encourage sustainable industry development

- Action: ACT Government to work to reduce unnecessary barriers to the establishment and successful operation of commercial nature based service providers. This should include publicising existing controls and working towards closer coordination of relevant government agencies.

- Action: A Nature Based Tourism Working Group be established with representation drawn from local nature based tourism service providers, and other appropriate government and non-government bodies to work to resolving issues relating to the development of nature-based tourism.
- Action: The ACTPCS establish a position of 'Visitor Services Manager' to act as the primary contact point with the tourism industry.
- Action: The ACT Government, with industry, jointly develop an information kit and consider other practical measures to assist existing and new operations. The information kit would include details, for example, of the applicable transport regulations.
- Action : The ACTPCS investigate and where appropriate provide small-scale retail opportunities or concessions within the parks system.

Strategy 2.3 : Maximise the long term benefit of nature based tourism to the ACT community.

- Action: Identify and promote opportunities for local communities, including the Aboriginal communities, to become involved in nature based tourism service provision.
- Action: Achieve a significant increase in yield from visitors enjoying nature based tourism in the ACT, for example through increases in the length of stay in the ACT.
- Action: ACT Forests and the ACTPCS work together to develop and implement a joint approach to marketing nature based tourism opportunities.

**Outcome 3 : An industry offering a wide range of quality tourist and recreational experiences to both residents and visitors**

Strategy 3.1 : Work with the industry and other stakeholders to develop an expanded range of nature based tourism products.

- Action : The ACT Government to work with industry to establish the Territory as a destination which delivers a quality nature-based tourism product through high standards in interpretation, facility design, staff training and minimum impact practices, while continuing to encourage local residents' use.
- Action : Relevant ACT Government agencies and other stakeholders to explore opportunities to integrate nature based tourism with other modes of tourism.

- Action : The ACT Government to encourage a partnership approach between agencies, and between government and industry in product development and exploring marketing opportunities.

#### Outcome 4 : An informed and rational capital investment process

Strategy 4.1 : Work to ensure that tourism infrastructure is the outcome of a rational and careful planning process, following the existing planning requirements and with community input.

- Action: The ACT Government, with industry, jointly develop an information kit for the public and industry to explain current planning, land management and environmental impact assessment arrangements and processes.
- Action : Proponents for developments in natural settings to be required to produce both a professionally prepared feasibility study and a site management plan, to detail measures for environmental monitoring and to ensure that monitoring be included in leasing arrangements with developers and operators.
- Action: ACT Government agencies to work to ensure that environmental monitoring of all likely impacts and necessary remedial actions are included as part of the costing of development proposals.

#### Outcome 5 : Wider recognition locally, nationally and internationally of the ACT as a unique nature based tourism destination

Strategy 5 : Ensure that ACT residents, visitors and potential visitors are aware of the ACT as a unique nature based tourism destination.

- Action: Relevant ACT Government agencies (including the ACTPCS, ACT Forests, and Canberra Tourism) to explore joint promotion with service providers.
- Action : ACTPCS to work towards facilitating broad public access within the context of park management requirements for each site, including provision for access for the disabled where feasible and appropriate.

- Action : That specific members of staff be designated to act as the key contact point for public queries concerning nature based tourism opportunities on lands managed by the ACTPCS and by ACT Forests.
- Action : The ACT Government to include nature based tourism in future initiatives to market Canberra as a tourism or business destination.
- Action : ACTPCS to investigate further opportunities for marketing to interstate and international school groups visiting the ACT.
- Action : Canberra Tourism's promotion to schools include information on ACT nature based tourism resources.

**Outcome 6 : Continually improving service standards to ensure high visitor satisfaction**

**Strategy 6.1 : Extend market research on nature based tourists**

- Action : Canberra Tourism, ACT Forests, and ACTPCS to undertake regular visitor surveys on the number and characteristics of nature based tourists to the ACT. These surveys to also investigate the sources of information used by visitors, expenditure, and the degree of satisfaction with services.
- Action: Other service providers to nature based tourists be encouraged to undertake similar surveys.

**Strategy 6.2 : That the ACT Government introduce measures to ensure quality services are provided to all those entering nature based tourism settings as part of an organised group activity.**

- Action: All nature based tourism service providers, including non-commercial organisations, be strongly encouraged to obtain relevant industry-recognised accreditation.
- Action: ACT Government to work with industry and other stakeholders to develop and implement a licensing system for commercial and organised/group activities within ACT parks and forests, as a matter of priority.
- Action: The ACTPCS continue to enhance business and customer service skills amongst staff, in part to promote better mutual understanding between Service staff and tourism service providers.

## **Where To Next?**

### **Initial priorities**

The Strategy has identified a mixture of short, medium and long term goals for the further development of nature based tourism in the Territory. However, the Government will, as a first priority, pursue the following initiatives :

- finalise management plans for all parks and reserves;
- undertake a public education / promotion campaign on the current planning, land management and environmental impact assessment systems in place to control development in and around the parks;
- improve tourist signage;
- extend current research and information gathering on park and other natural area users;
- increase marketing and promotion of higher yield nature based tourism products;
- investigate further nature based tourism development opportunities;
- further investigate the scope for user charges; and
- with the industry and other stakeholders, develop and implement an appropriate licensing and accreditation system for nature based tourism operators.

### **Feedback**

The ACT Government welcomes feedback on this Strategy. Comments should be directed to :

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Telephone 207 6090, fax 207 2227



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## **A brief description of the ACT parks and reserves**

### **Namadgi National Park**

Namadgi National Park covers 47 per cent of the Australian Capital Territory, and includes an extremely wide variety of habitats, ranging from broad grassy valleys to snow gum woodland and subalpine herb fields. Namadgi is also the northern most part of the combined New South Wales / Victorian / ACT Australian Alps National Parks system. The park has significant cultural values covering Aboriginal prehistory and the settlement by Europeans from the 1830's.

The park has a wide variety of scenic landscapes, with a diverse range of vegetation types. Wildflowers in spring and summer, and snow recreation in winter are primary attractions. Eastern grey kangaroos are the most common animal although it is possible to see other macropods, echidnas and perhaps wombats during a day visit. Night visitors tend to see more mammals. Casual visitors can see a great variety of birdlife but, once again, unskilled observers will not usually see spectacular displays of larger species. Most species are small, in small groups, and quite shy. Appreciation of wildlife in Namadgi is greatly enhanced for most visitors if they are accompanied by a skilled interpreter or if they are shown what to expect and look for.

Visitor facilities include 150 kilometres of marked walking tracks, two campgrounds and many picnic areas. All Namadgi streams other than the upper Cotter River (which forms part of the Canberra water catchment), are classified as trout waters. The Namadgi Visitor Centre provides an interpretive introduction to the park through hands on displays, an audiovisual display and a small retail shop.

### **Canberra Nature Park**

Canberra Nature Park comprises the bushland areas adjacent to the Canberra urban area. Most of these areas are hills and ridges which were once cleared for grazing, but are now returning to a more natural state through regeneration or planting. The hills of Canberra Nature Park range from dry eucalypt forest to grassland.

Canberra Nature Park has a great diversity of wildflowers and many animals are readily observed. In particular, there is a great diversity of orchids, birds and insects in the forested areas such as Black Mountain, and threatened species in valuable remnants of native grasslands such as Mulligans Flat.

Canberra Nature Park is mainly used for walking and picnics by the local community. A few of the inner hills have tourist facilities, such as viewing platforms or restaurants and these receive a large number of visitors each year. Black Mountain Tower, for example, receives over 400,000 visitors per year. Specialist interpretive tours have developed in some parts of Canberra Nature Park, including ranger guided walks.

### **Jerrabomberra Wetlands**

Jerrabomberra Wetlands is an element of Canberra Nature Park. This small reserve, close to the City, provides a series of habitats which support a rich and diverse bird fauna, including most of the wetland species occurring in southern Australia. Many terrestrial bird species also occur there as well as numbers of platypus and water rats, amphibians, reptiles and fish. Jerrabomberra Wetlands is used as a stopover by a number of migratory birds, including species which are the subject of agreements between Australia and both Japan and China.

The central location of Jerrabomberra Wetlands provides enormous potential for wetland education to allow students, locals and visitors an opportunity to enjoy and learn about Wetland habitats. Birds can be viewed from specially constructed observation hides and walking tracks are provided.

### **Murrumbidgee River Corridor**

Murrumbidgee River Corridor contains the whole of the Murrumbidgee River as it passes through the ACT. The Corridor is 66 kilometres long, up to four kilometres wide and is made up of a series of nature reserves, leased grazing land, recreation areas and the Lanyon Conservation Zone. The corridor has valuable areas of riverine vegetation, grasslands and woodlands. Important species include native fish, native grasses, casuarinas and native pines. The corridor supports the migration of honeyeaters and other birds each autumn. Threatened species, including Murray Crays, grasshoppers and legless lizards occur in the corridor.

The corridor is used by a very large number of Canberra residents and visitors; facilities include a campground, walking trails and picnic / barbecue areas.

### **Googong Foreshores**

Googong Foreshores is located 10 kilometres south of Queanbeyan in NSW. The reserve is managed by the ACT Parks and Conservation Service as a water catchment, a recreation area for public use and as a wildlife refuge. There are extensive areas of dry forest habitat, grasslands and woodlands as well as some wetland habitat suitable for waterbirds. Much of the eastern side of the

reserve has been modified by grazing in the past. Eastern grey kangaroo are the most common mammal seen by visitors along with several species of common birds.

Activities include fishing, bushwalking, sightseeing and picnicking. Canoeing and sailing are permitted on the reservoir. There are several walking trails including London Bridge Arch and the historic London Bridge Homestead. Downstream of the dam wall is a gorge with high scenic values, and where swimming is allowed.

### **Tidbinbilla Nature Reserve**

Tidbinbilla Nature Reserve is situated 40 km from Canberra on Tourist Drive Number 5.

Tidbinbilla's main attraction is the abundance of wildlife viewing opportunities, particularly in the wildlife enclosures. The walk-through enclosures range in size from 13 to 26 hectares. Kangaroos, koalas and waterbirds can be observed in relatively natural conditions without fences obstructing the view.

Tidbinbilla Nature Reserve has the greatest nature based tourism potential in the ACT. The existing product has appeal for both the self drive and the group tour market. The wildlife enclosures have appeal to international tourists who are now looking for a more authentic wildlife experience than the "zoo" experience that most of them have been getting. The reserve is appealing to all levels of nature based tourists, from experience naturalists through to recreation seekers.

The Reserve has more visitor facilities than other parks, including a large variety of walking trails passing through a variety of habitats, high quality interpretation, the visitor centre displays and audiovisual and educational retail products. Ranger guided walks are a regular feature and reach a high percentage of visitors. The high level of interpretation provide an opportunity for Tidbinbilla to deliver a nature based tourism product which is a true ecotourism product.

## **Land management in the ACT**

The area of the ACT is 2,400 square kilometres and over half of this is reserved for nature conservation purposes. A number of Acts, plans, policies and guidelines guide the ACT Government's management of natural areas.

### **Categories of land in the ACT**

The ACT is unique in Australia in its planning and land management arrangements because of the leasehold system and the division of responsibilities between Federal and local government. As a result, the processes required to consider a particular development depend on the type and location of the proposed development.

The *ACT (Planning and Land Management) Act 1988 (Cth)* provides for two categories of land in the ACT:

- National Land, used by or on behalf of the Commonwealth and managed by the Commonwealth; and
- Territory Land - all the remaining land (ie. land that is not declared National Land) that is managed by the ACT Government (on behalf of the Commonwealth).

The most significant feature of planning following passage of the Planning and Land Management Act has been the establishment of two planning bodies, the National Capital Planning Authority (now the National Capital Authority, NCA) and the ACT Planning Authority (now the Planning and Land Management Group of DUS, or PALM). In addition to other functions set out in the Act, the NCA was established by the Commonwealth to ensure, through the *National Capital Plan*, that Canberra and the ACT are planned and developed in accordance with their national significance.

The *National Capital Plan*, which came into effect in December 1990 sets out general land use policies for the ACT and provides for Commonwealth involvement in the detailed planning, design and development within areas identified as having the special characteristics of the National Capital. These areas are defined as Designated Areas in the *National Capital Plan*. The NCA has the planning responsibility for those areas, which may be either National Land or Territory Land.

Those areas so affected are:

- the Central National Area including Lake Burley Griffin, its foreshores and the Parliamentary Zone;
- the main avenues and approach routes to Canberra; and
- the inner hills and ridges and buffer zones which provide Canberra's landscape setting.

The Plan may also specify special requirements for the development of any area which is desirable in the interests of the national capital. For example, the Plan specifies requirements for Namadgi National Park and adjacent areas, the Murrumbidgee River Corridor, and some areas under the control of ACT Forests.

Planning for areas which are not Designated Area is the responsibility of PALM under the *Land (Planning & Environment) Act 1991* (the Land Act) and through the *Territory Plan*, which came into effect in October 1993. The object of the Territory Plan is to ensure that planning and development of the ACT provides the people of the ACT with an attractive, safe and efficient environment in which to live, work and have their recreation. For the policies of the *Territory Plan* to have effect, they must not be inconsistent with the *National Capital Plan*. Areas of National Land that are not Designated Areas come under the jurisdiction of the *Territory Plan*, although the *National Capital Plan* prescribes that development proposals for such areas be assessed in relation to the provisions of both plans.

### **The process for assessing environmental impacts**

Any proposal for nature-based developments on Designated Areas or National Land must be referred to the NCA for a process of works approval. In approving these works, which could include the construction, alteration or extension of buildings or structures, tree felling, landscaping, or excavations, the NCA needs to be satisfied that all the necessary procedures have been followed in respect to environmental effects.

If a proposal is likely to have a significant impact on the environment, the NCA has a responsibility to refer the proposal to the Department of Environment, Sport and Territories (DEST) which administers the *Environment Protection (Impact of Proposals) Act 1974*. Referring the proposal to DEST requires that the proponent of development, prepare a Notice of Intent containing details of the proposed development.

Based on this information, the proposal is assessed against criteria in the Impact of Proposals Act and is either cleared or subject to further action, such as a request for a Public Environment Report or an Environmental Impact Statement. Note that it is also possible for the Commonwealth to agree to the use of ACT impact assessment provisions where deemed appropriate.

Proposals can be referred to DEST for assessment under the environmental legislation from other sources (ie it need not come through the NCA). In determining a works approval the NCA will take the findings of an environmental assessment into account.

On both Territory Land and Designated Land any proposal that calls for:

- a variation to the Territory Plan (ie change in land use)
- the granting or variation of a lease over Territory Land
- a controlled activity, such as an encroachment on public land, or
- any design and siting proposal

is subject under the Land Act to consideration by the Planning Minister or the Minister's delegate.

A development proposal is then examined against the requirements of the Land Act and the Territory Plan (Appendix II) to determine whether the proposal is significant enough to warrant the triggering of Part IV (Environmental Assessments and Enquiries) of the Land Act.

A proponent may be identified to prepare a preliminary assessment under Schedule 3 of the Land Act. The role of the preliminary assessment is to provide a basis for a decision on whether there are environmental issues which warrant further and more detailed assessment. Preliminary assessments are then made available for public inspection. In the case of a nature based tourism development the proponent would probably be the company or individual seeking development approval.

Following the public inspection a preliminary assessment the project is evaluated to decide whether further levels of assessment are required. In making this decision the outcome of other processes for eg., round-table discussions, are considered.

If further assessment is required it can take one of the following forms:

- a public environment report;
- an environmental impact statement,
- an inquiry.

If it is decided that no further assessment is required, it may be recommended that issues highlighted in the preliminary assessment be picked up in detailed planning or implementation of the proposal.

The environmental impact assessment process in the ACT is used to determine whether the impacts on the environment of any proposal have been adequately addressed before a decision to proceed is made. Once a decision to proceed is made, controls can be placed on the development. These controls can take the form of lease and development conditions, and design and siting requirements. Environment protection legislation such as in the *Water Pollution Act 1984* can also influence what controls are placed on the development.

### **Heritage protection and legal requirements for conservation**

A Heritage Places Register has been established by the ACT Heritage Council under the Land Act. Specific Acts apply to the protection of the ACT's natural heritage, in particular the *Nature Conservation Act 1980*. The Nature Conservation Act is the primary legislation for the protection of native plants and animals and the management of reserved areas. The Act has recently been amended to provide for the identification and conservation of threatened species and the management of processes that pose an environmental threat to them. An ACT Nature Conservation Strategy is being developed to ensure the long term conservation of the biological diversity of the ACT and to promote community involvement in nature conservation.

The ACT Government is a signatory to the Alps Memorandum of Understanding (MOU). Namadgi National Park (105,900 ha) is a part of the 1.4 million hectares which constitutes Australia's alpine and sub-alpine environments. This area includes Kosciusko National Park and adjacent areas in NSW and Victoria. The MOU was signed in 1986 and updated after ACT Self Government by the respective state/territory land managers and the Commonwealth Government.<sup>39</sup>

The ACT has also endorsed the Intergovernmental Agreement on the Environment, the National Forest Policy Statement, the National Strategy for Ecologically Sustainable Development and the National Greenhouse Response Strategy.