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NATURE BASED TOURISM

IN THE
AUSTRALIAN CAPITAL
TERRITORY

**DRAFT
STRATEGY**



**CANBERRA
TOURISM COMMISSION**



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Executive Summary

Almost 70% of the Australian Capital Territory is composed of national park and nature reserves. This represents an enormous resource for the sustainable development of nature based tourism in the ACT.

The ACT Nature Based Tourism Strategy has been developed in response to the growth of this niche of the tourism industry and aims to develop and promote the ACT as a quality destination for holidays within nature.

Using the Commonwealth Department of Tourism's National Ecotourism Strategy as a basis, this strategy focuses on the identified issues as they impact upon nature based tourism in the Territory, by placing the discussion within a local context.

This strategy, unlike the National Strategy, focuses on nature based tourism because the issues highlighted in the consultation process have been raised by the growth in nature based tourism, rather than ecotourism. Nature based tourism is distinguished from other forms of tourism, by its reliance or incorporation of visits to natural environments. This document views ecotourism as an important sub-set of that industry.

The definition of ecotourism as detailed in the National Ecotourism Strategy, however, has been adopted for the ACT, as its principles of education, interpretation and ecological sustainability, encapsulate an achievable standard for the local nature based tourism industry.

Nature Based Tourism in the ACT has been examined within the context of planning, infrastructure development, regulation, accreditation, the involvement of indigenous Australians, sustainability, impact monitoring and the market place. The Strategy also discusses the relationship of nature based tourism and ecotourism in the context of the larger tourism industry in the ACT and Australia, the issues impacting on the development of nature based tourism in the Territory, analyses the nature based tourism market nationally and internationally; and suggests a number of strategic marketing options and actions.

Ecological Sustainability is the fundamental principle of ecotourism and in the ACT will set a standard for the nature based tourism industry. Ecological sustainability has been recognised at a national and international level as the basis for all human activities. The ACT as a signatory to the Intergovernmental Agreement on the Environment, the National Strategy for Ecologically Sustainable Development, the National Greenhouse Response Strategy and the National Forest Policy Statement, has given its commitment to manage its affairs in accordance with ecologically sustainable principles.

Planning and infrastructure development in the Australian Capital Territory is controlled by the National Capital Planning Authority (NCPA) and the

ACT Planning Authority (ACTPA). The approval of developments is governed by the principles, policies and objectives of the National Capital and Territory Plans.

Both contain stringent measures for the protection of the environment against degradation produced by any developments. Environmental assessments are an important component of the protection process. This Strategy highlights the importance of developing detailed criteria for nature based tourism developments and the need for the involvement of land managers in the decision making process for developments. Intense infrastructure is strongly discouraged. Cooperation and communication between land managers and the private sector is encouraged.

The Territory Plan also extends to the protection of heritage sites, especially cultural heritage sites, which in the ACT's national park, includes Indigenous as well as European sites and artefacts. The history of aboriginal Australia is an integral part of nature based tourism in the ACT.

At a national level the involvement of indigenous Australians in the development of the local nature based tourism industry may be influenced by the Native Title Act 1993, and the impending release of the National Aboriginal and Torres Strait Islander Tourism Strategy. In the ACT, the local aboriginal population will be consulted through the Chief Minister's Advisory Council, the Mulungari Corporation, the Aboriginal Heritage Standing Committee and the South Eastern NSW/ACT Indigenous Regional Council.

The legislative framework extends to the operation of the industry within ACT Parks and relates to the protection of the resource via the control of impacts. Operators are already governed by the regulations which apply to the behaviour of individuals within parks. Licensing would be an extension of the current regulative framework and would serve to ensure that operators adhere to industry best practice.

Accreditation as it relates to the standard of commercial operations in regard to delivery and as a means of impact control is currently being examined by the Department of Tourism. The ACT Nature Based Tourism strategy suggests that the finalised Ecotourism Accreditation Scheme be adopted by the ACT, as part of a coordinated, consistent national system.

The number of visits to Namadgi National Park have increased by 10% per annum over the last three years. To ensure ecological sustainability, economic viability and a quality visitor experience, appropriate monitoring systems need to be put in place. The Strategy discusses the means of measuring and controlling impacts in the ACT, including the need for monitoring and remedial action to be essential elements of the costing of development proposals.

Economic viability in the ACT for tour operators and future infrastructure developments will result from effective marketing of the facility and destination. The Strategy analyses the market and defines the target group as people probably aged between 30 and 49. They are likely to have children and earn above average

income. The Strategy highlights North America as the strongest international market base.

Competition for the nature based tourism market will become intense in the next few years. For the ACT to capture the potential, industry and Government need to position the ACT as a destination which delivers a quality product, through high standards of interpretation, better amenities, presentation of people and facilities, quality promotional material, and comprehensive training and research.

Introduction

Travellers to and within Australia have, in recent years shown a marked preference for the attractions of our natural environment. As a result, the number of tourism operations providing an experience within this environment has increased dramatically. Four wheel drive safaris, bush walking expeditions, horse-riding, white water rafting, mountain bike riding, and many more activities have emerged to cope with the demand. The industry which has developed has become known as the nature based tourism industry. In recent years the term "ecotourism" has been used to describe an element of this industry.

Pursuing a need to manage this growth industry, the Commonwealth Department of Tourism released a draft National Ecotourism Strategy in November 1993. The final strategy was released in March 1994. Many of the issues identified within that strategy fall within the responsibilities of the States and Territories. The ACT Government is among the first to identify the need, and set in place the process, for the development of an Ecotourism Strategy particular to the Australian Capital Territory.

The growth of tourism in the ACT has largely come as a result of the natural attraction of the National Capital for all Australians. Marketing of Canberra as a tourism destination has been a combination of the efforts of the Canberra Tourism Commission, the accommodation industry, private sector attractions and tour operators and the large number of publicly funded national institutions which are central to the appeal of the National Capital.

Tourism growth is a two edged sword. Consideration of the positive impacts of increased income, increased employment, cultural enrichment and improved quality of life must be balanced by consideration of the impact of visitors on scarce resources, facilities, infrastructure and the culture of the region.

With this in mind, the Commission has embarked on a series of strategic examinations of the major issues in tourism today. This strategy is the first in that series. It has been developed following a process which began with formation of a working group, composed of representatives of organisations with a particular interest in environmental and tourism issues.

The group developed an issues paper, based on the issues identified within the National Ecotourism Strategy, which was released for public comment. The submissions which were received in response to that issues paper were then discussed at a number of workshops, the discussion providing the framework for this document.

This strategy is the result of considerable desk and field research on tourism, ecotourism, marketing and environmental issues. The document has been written by officers of the Canberra Tourism Commission and the ACT Parks and Conservation Service and members of the working group.

This strategy will;

- discuss the relationship between tourism, nature based tourism and ecotourism;
- discuss the particular issues which will impact on the development of nature based tourism within the ACT;
- examine the nature of the tourism industry in Australia and in the Australian Capital Territory; and
- go on to analyse the nature based tourism market nationally and internationally including a discussion of the nature and motivation of nature based tourists; and to
- suggest a number of strategic marketing options and actions which flow from the adoption of those strategies.

The aim of this strategy is to develop and promote the ACT as a quality destination for holidays within nature.

This will be achieved through the following objectives:

Objective 1 Awareness

Establish the ACT as a recognised destination for holidays within a natural environment by developing a strong awareness among potential visitors and Canberra residents, of the national parks, reserves and open spaces of the ACT.

Evaluation: Research changing attitudes through Canberra Tourism Commission market research.

Objective 2. Credibility

Establish the ACT as a destination which delivers a quality nature based tourism product through adopting best practice in interpretation, environmental design and minimum impact; and where industry recognise and accept the ideals of ecotourism.

Evaluation: Research visitor satisfaction through the Canberra Visitor Survey and through informal survey feedback from the nature based tourism industry.

Objective 3. Performance

To increase the proportion of visitors to the ACT who have a nature based experience from the current 7% (approximately 100,000) to 17% (approximately 250,000) by the year 2000. To achieve a higher proportion of nature based tourists in the ACT with an ecotourism experience than in any other state in Australia.

Evaluation: Research visitor numbers and average length of stay through the Canberra Visitor Survey; and through separate statistical surveys conducted by the Parks and Conservation Service.

Establish criteria for an ecotourism experience and assess the delivery of operators and land managers against that criteria.

Nature based tourism

The process which led to the development of this strategy raised a number of questions about the nature of tourists and ecotourists. The original intention was to examine the potential for the ACT in the growing "ecotourism" market.

At the very beginning, ecotourism was seen as a broad way of describing tourism within a natural environment. The release of the National Ecotourism Strategy by the Department of Tourism effectively narrowed the view of ecotourism to a precise, ideal component of a larger industry.

Additionally, the definition of a tourist had to be modified to allow for the effect of the large number of Canberra residents on parks and nature reserves.

What is a tourist?

The Canberra Tourism Commission measures the number and activities of visitors to the ACT via the Canberra Visitors Survey, the results of which are issued quarterly. This survey defines a *domestic tourist* as:

"A person who normally resides in Australia and is visiting (Canberra) for a period of less than 12 months for any reason other than to take up temporary employment...[an]...*International visitor* [is] a person arriving in Australia who normally resides outside Australia and is visiting for less than 12 months for any reason other than to take up temporary employment."¹

These definitions are compatible with those used by the Bureau of Tourism Research and the Australian Bureau of Statistics.

As noted in submissions however, these definitions do not account for local visitors. Research conducted by students from the University of Canberra suggests that approximately 83% of all visitors to Tidbinbilla Nature Reserve come from the Canberra-Queanbeyan area.²

Therefore for park management purposes the word "tourist" will be used in a sense which incorporates *all* visitors to the parks and reserves despite their origin. For tourism marketing activities conducted by the Canberra Tourism Commission outside the ACT, "tourists" will be as defined in the Canberra Visitors Survey.

What is ecotourism?

Many definitions of ecotourism exist which cover a multitude of view points, contexts and beliefs, which were discussed in the original issues paper.

¹Canberra Visitors Survey 1992/93; Chief Minister's Department; p32

²Study cited in Submission 14b; p2

Submissions received from the ACT Community included the following suggestions for a clear definition of ecotourism:

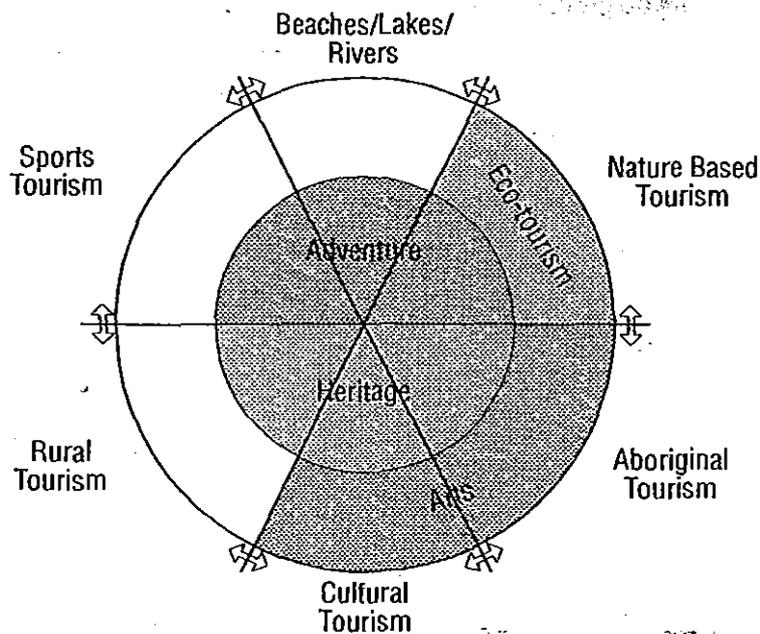
- tourism that is nature based;
- tourism that is ecologically and socially responsible;
- nature based tourism that fosters environmental appreciation and understanding;
- the provision of local and regional benefits;
- the importance of recognising the integration of indigenous cultural features with ecological processes; and
- management of cultural and natural resources in terms of sustainability.

Because it emphasises these elements the Federal Department of Tourism's definition has been adopted by the working group, for the ACT:

"Ecotourism is nature based tourism that involves education and interpretation of the natural environment and is managed to be ecologically sustainable.

This definition 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."³

The Relationship Between Nature Based Tourism, Ecotourism and other tourism



³Opcit; National Ecotourism Strategy; p17

Nature Based Tourism

Nature based tourism includes:

"all forms of tourism that rely on or incorporate visitation to natural environments; ecotourism and adventure tourism are subsets of nature based tourism...Ecotourism is distinguished from other forms of education or nature based tourism by a high degree of environmental and ecological education delivered in the field by qualified interpreters."⁴

The issues which this strategy addresses in the following pages have been raised by the growth of nature based tourism rather than ecotourism. Much of the data used to provide an analysis of the potential market for the ACT is drawn from nature based tourism activity, not ecotourism. The definition of ecotourism, strictly interpreted, excludes the majority of existing and potential nature based tourism activity. This strategy will therefore largely address the issues and potential in nature based tourism for the ACT, treating ecotourism and adventure tourism as components of nature based tourism.

All nature based tourism can become ecotourism provided that the requirements of the definition adopted by this strategy are met. A nature based tour operator who provides education and interpretation of the natural environment, manages to be ecologically sustainable, includes cultural components and provides an appropriate return to the local community and to the long term conservation of the resource is an ecotourism operator.

The definition of ecotourism provides a standard which nature based tourism operators should reach and maintain. The ACT Parks and Conservation Service and the Canberra Tourism Commission will actively seek to develop a nature based tourism industry which will adopt the standards of ecotourism.

Action

This strategy is a discussion of nature based tourism which includes all forms of tourism that rely on or incorporate visitation to natural environments.

The nature based tourism industry within the ACT will adopt the standards and ideals of the ecotourism definition in the National Ecotourism Strategy.

The definition of tourist encompass all visitors for the purposes of park management; and that the Canberra Tourism Commission continue to use a more specific definition for the purposes of calculating visitor numbers to the ACT.

⁴Explore International, Dream Green - South Australia's Future in Ecotourism, October 1993

The ACT Context

The area of the ACT is 2,400 square kilometres and over half of this is reserved for nature conservation zones. The ACT is a biologically diverse area, yet ecosystem boundaries are not linked to the human-made borders; it is an integral part of the region and in this way affects and is affected by the management of the region.

Areas managed by the ACT Parks and Conservation Service include: Tidbinbilla Nature Reserve, Namadgi National Park, Murrumbidgee River Corridor; Canberra Nature Park including Jerrabomberra Wetlands and Googong Foreshores in NSW.

A number of Acts, agreements and guidelines influence the ACT Government's management of natural areas. Some of these relate to the need for regional, inter-state and national cooperation.

Categories of Land in the ACT

The ACT is unique in Australia in terms of the categories of land and Authorities responsible for planning and managing that land. As a result the processes required before a development occurs differ and depend on where that development is proposed.

The development of the ACT is the responsibility of both the Commonwealth and the ACT Governments. *The Australian Capital Territory (Planning and Land Management) Act 1988* 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 of the ACT (ie land that is not declared National Land) which 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 (NCPA) and the ACT Planning Authority (ACTPA). In addition to other functions set out in the Act, the NCPA was established by the Commonwealth to ensure, through the *National Capital Plan*, that Canberra and the Territory 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 Territory as a whole 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 NCPA has the planning responsibility for those areas, which may be either National Land or Territory Land. The major designated areas 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 which provide the landscape setting for the major national buildings.

Planning for areas which are not Designated Area is the responsibility of the ACTPA 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 Territory provides the people of the Territory 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 which are not in Designated Area 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 on designated and national land in the ACT

Any proposal for nature based developments on designated or National Land must be referred to the NCPA 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 NCPA 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 NCPA has a legal responsibility to refer the proposal to the Department of Environment, Sport and Territories (DEST) which administers the *(Commonwealth) Environment Protection (Impact of Proposals) Act 1974*. Referring the proposal to DEST requires that the proponent of development, prepare a "Notice of Intention" containing details of the proposed development.

Based on this information the proposal is assessed against criteria in the *(Commonwealth) Environment Protection (Impact of Proposals) Act 1974* and is either cleared or subject to further action, such as a request for a Public Environment Report or an Environmental Impact Statement.

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

The Process for assessing environmental impacts on designated and Territory land in the ACT

On Territory and Designated Land any proposal that calls for:

- a variation to The Territory Plan (i.e. change in land use);
- the granting or variation of a lease over territory land;
- a controlled activity, such as and encroachment on public land; or any
- design and siting proposal;

is subject under the *Land (Planning and Environment) Act 1991* (Land Act 1991) to consideration by the Environment Minister or the Minister's delegate.

A development proposal is then examined against the requirements of the *Land Act 1991* 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 1991*. 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.

Once it is decided that a preliminary assessment is required the Minister or Minister's delegate identifies a proponent who then prepares the preliminary assessment pursuant to Schedule 3 of the *Land Act 1991*. In the case of a nature based tourism development the proponent would probably be the company or individual seeking development approval.

Once completed the Minister's delegate approves the preliminary assessment to be made available for public inspection.

Following the public inspection of the preliminary assessment the project is evaluated by the Minister or his/her delegate to decide whether further levels of assessment are required. In making this decision the preliminary assessment, the outcome of any round the table meeting and other processes, for example whether there is another full scale assessment in progress, are considered.

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

- . A Public Environment Report;
- . An Environmental Impact Statement,
- . The establishment of a panel of enquiry with extensive powers to summon witnesses, examine documents and require other forms of assessment.

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.

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

Under Section 7(3) (d) of the *Land Act 1991*, a Heritage Places Register has been established by the Heritage Council of the ACT. This is a Register of places which the ACT community considers important to keep, and includes aboriginal sites.

Specific acts apply to the protection of the ACT's natural heritage and in particular the Nature Conservation Act 1980 provides for the protection of native plants and animals.

The Territory Government is also a signatory to the Alps Memorandum of Understanding (MOU). Namadgi National Park (105,900ha) is a part of the 1.4 million hectares which constitutes Australia's alpine and sub-alpine environments. This area also includes Kosciusko National Park in NSW, the Alpine National Park in Victoria, Snowy River National Park, Avon Wilderness Park as well as Scabby Ranges and Bimberi Nature Reserves. The MOU was signed in 1986 and updated after Self-Government by the respective State/Territory land managers and the Commonwealth Government. The objective of the MOU is to:

"...pursue cooperative management and develop complementary policies to protect the scenery, water catchments, plants, animals and cultural heritage of the Australian Alps as a whole ecosystem, whilst providing opportunities for public enjoyment of that resource."⁵

Key result areas for the Alps Liaison Committee are: community awareness, resource conservation, visitor facilities and services and management expertise.

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. All these recognise the vital and fundamental role the environment plays in economic development and the need to consider the ecological processes when making decisions to improve the quality of our lives.

Canberra in the Year 2020, a report presented to the Legislative Assembly in August 1993 which details a preferred medium term future for the ACT, stresses the importance of maintaining biological diversity and managing the ACT's natural resources according to ecologically sustainable principles. The report also outlines a future in which local indigenous peoples actively participate in the management of natural reserves in the Canberra Region.

A Greenhouse Strategy for the ACT was released in 1993 and outlines ways in which the ACT can help reduce greenhouse emissions.

An ACT Environment Strategy is also being drafted and is currently being finalised. The Strategy will encourage all aspects of Government to manage the environment in a coordinated and focussed way.

The *Nature Conservation Act 1980* is the primary legislation for the protection of native plants and animals and the management of national parks and nature reserves. 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.

⁵Australian Alps Liaison Committee Annual Report 1992/93; p5

At a national/international level the Commonwealth Government attended the United Nations Conference on Environment and Development in Rio, 1992. Australia agreed to the Rio Declaration on Environment and Development, Agenda 21 and the United Nations Framework Convention on Climate Change as well as the Convention on Biological Diversity. The Rio Declaration on the Environment and Development sets out principles to guide governments on issues such as population, intergenerational equity, liability for environmental damage and the need for environmental impact assessments.

Agenda 21 is an action plan which aims to move the world towards ecologically sustainable development and covers issues such as social and economic issues, the conservation and management of resources for development, important partnerships required for sustainable development and the means of implementation, including financial arrangements, education, science, legal mechanisms and technology.

The United Nations Framework Conventions on Climate Change and Biological Diversity were both ratified by the Australian Government. The former aims to stabilise the concentrations of greenhouse gases in the atmosphere and the latter recognises the importance of the conservation and sustainable use of biological diversity and aims to achieve equity with regard to the profits or benefits which are gained from the use of non-replaceable genetic resources.

The ACT Nature Based tourism Strategy then is being developed within a context which recognises the importance of ecological sustainability in an environment when increasing pressure is being placed on resources, world-wide, for economic gain.

Involvement Of Indigenous Australians

Although Canberra is not recognised as a tourist destination which has a strong association with its indigenous past, unlike the Northern Territory and Queensland, sites of Aboriginal significance exist within its national parks and reserves, some of which suggest occupation dating back at least 21,000 years.

As Josephine Flood notes in her book, *The Moth Hunters*, there appears to have been two major campsites in the local region which were associated with fishing and the catching of aquatic birds. These were Nardoo on Lake George and Pialligo. Evidence suggests that Pialligo was the centre of the Canberra tribe and European historical evidence notes that there were gatherings of up to 500 people at this camp site. Black Mountain Peninsular was also an important local camp.⁶

The Brindabella and Tidbinbilla ranges in the Canberra region were the focus for summer Bogong moth hunting by the highland groups, including the Ngunnawal people who were based around the Queanbeyan/Canberra-Goulbourn area. The local indigenous people travelled seasonally between three ecological zones of the Canberra region - the rivers, montane valleys and the moth localities in the mountains - in their search for food.⁷

Many sites exist in the ACT which attest to the past lifestyles and activities of Aboriginal people. Examples of such sites are: artefact scatters, rock art sites, such as Yankee Hat rock shelter in Namadgi National Park, chert procurement sites, artefact grinding grooves and scarred trees.

As was noted in the ACT Heritage Council's submission paper:

"Cultural resources form an important component of many landscapes which are conserved also for their biotic and other values. This is clearly the case with the Aboriginal sites which represent 99% of the region's human past. These places include artefact scatters or camping grounds, stone procurement sites, scarred trees, rock shelters, art sites and ceremonial places."⁸

Current park management plans document Aboriginal sites and recognise their heritage and conservation value. Although separate management plans for each park have been, or are being developed, which take into account the specifics of individual areas, the management plan for Namadgi National Park serves as a guide for the focus of the Government's role in the protection of Aboriginal sites.

Cultural sites in the Namadgi National Park plan are defined as places containing physical evidence of, or association with, past human activities or beliefs and includes sites, places, precincts and routes which are connected with Aboriginal and European exploration, occupation and use of the area. Management of the cultural

⁶Flood, Josephine; *The Moth Hunters*; p162

⁷ *Ibid*; p175

⁸ Submission No. 15 ACT Heritage Council

resources of the park is regarded as a of equal importance as the management of its natural resources.

Aboriginal sites are managed according to park management guidelines, the basic aim of which is to preserve all sites from disturbance and permit only such activities which are considered essential for their investigation and protection from interference. Sites selected for public access have been chosen after an assessment of their vulnerability to disturbance and their interest to visitors.⁹

Representation of Indigenous People in the ACT

In the ACT indigenous people are represented by the Mulangarri Corporation and by the Aboriginal and Torres Strait Islander Advisory Council and at a broader regional level by the South Eastern NSW/ACT Indigenous Regional Council. The Advisory Council reports to the Chief Minister on issues affecting the needs of Aboriginal and Torres Strait Islander people in the ACT. Consultation on issues relating to Aboriginal sites in the ACT is undertaken with the Mulangarri Corporation, representing the Ngunnawal people, and the South Eastern NSW/ACT Indigenous Regional Council. Heritage advice on Aboriginal sites in the ACT is coordinated by the Heritage Council of the ACT with the assistance from the Aboriginal Heritage Standing Committee.

At a national level there are two developments which emphasise the importance of the involvement of indigenous Australians in land management in the ACT and Australia wide. These are the development of the National Aboriginal and Torres Strait Islander Tourism Strategy, which is available for comment until mid 1995, and the *Native Title Act*, which may both influence the involvement of indigenous Australian in the tourism industry.

Action

That ACT Government agencies recognise the importance of the High Court decision in Mabo and Others vs the State of Queensland and the Native Title Act 1993, as well as the National Aboriginal and Torres Strait Islander Tourism Strategy as they impact upon nature based tourism in the ACT.

That ACT Government agencies consult with local representatives of the Ngunnawal/Mulangarri Aboriginal Corporation with regard to the development of nature based tourism in the ACT.

⁹Namadgi National Park Management Plan; pp37-40

Infrastructure Development

Tourism infrastructure can take many forms. There is a continuum of developments from those aimed at protecting natural areas to developments that have little relationship to the natural values of an area. Levels of development on this continuum range from minor developments to intense developments.

These differing levels of tourism development can be identified, from hardening of an overused site to protect site values such as soil or vegetation; amenity improvements ranging from board walks and other track improvements and the sealing of carparks, through to facilities which use natural areas as a setting such as hostels, motels, hotels or resort style accommodation, conference centres, shopping centres, theatres, or restaurants.

While any development may have an environmental slant, only those that are aimed at protecting the environment and education / interpretation would classify as ecotourism. Intense developments are outside the scope of this strategy because of the level of impact and because education/interpretation is unlikely to be a core business of the enterprise. Therefore intense style developments are not discussed further.

As a minimum nature based tourism activities which involve infrastructure development should aim to:

- involve the land manager in the planning stages;
- ensure that land managers can effectively manage impacts and control developments;
- give substantial benefits back to the natural resource;
- meet the requirements of park management plans, the Territory Plan and the National Capital Plan;
- increase the capacity of an area without increasing damage to natural values;
- provide a significantly enhanced experience that cannot be provided with less impact (ie. keep within the lowest level of development that meets the tourism and educational objectives of the projects); and
- ensure there is a demonstrated demand for the facility.

Planning considerations

Development inside or outside parks?

The Australian Conservation Foundation argues that in general, developments within parks are undesirable because only about 6% of Australia is protected for nature conservation. An alternative argument is that developments are more easily controlled by park managers if they are within the boundaries of parks. This latter argument is not as applicable in the ACT as in most states, as all ACT land is subject to lease conditions, the Territory Plan and the National Capital Plan. Other state agencies have had difficulty controlling developments whether they be inside

or adjacent to parks. Success in managing a development in or adjacent to natural areas depends on the will and ability of government to enforce lease conditions.

Infrastructure may not always be appropriate for the nature based tourism experience. This is true for all levels of tourism development. Any permanent installation can affect the natural values of an experience. However, where there is an established pattern of use, some developments may enhance the environmental protection of an area eg such as boardwalks over sensitive sites.

Large developments are most likely to be controversial and must not be allowed.

In particular accommodation involves a long term change in land use and a large amount of related infrastructure. Therefore, provision of accommodation facilities that relate to parks should provide an experience that is of high educational value and otherwise unobtainable.

Incremental changes

The National Ecotourism Strategy notes that provision of even basic infrastructure can generate further demand and lead to pressure for further access and facilities. If a wide spectrum of ecotourism experiences is to be provided in the ACT, even minor improvements which may lead to increased accessibility should be avoided where possible in sensitive and less developed areas.

The Territory Plan

The Territory Plan states in its section on land use policies for 'Mountains and Bushlands' with specific regard to tourist facilities that:

- only low rise buildings are appropriate;
- buildings should integrate with the landscape;
- building developments should consider compatibility with related sensitive areas;
- development should be kept to a minimum required to support land management activities; and that
- development should be confined to the perimeter of environmentally sensitive areas.

The Territory Plan also outlines specific development conditions including design and siting, maintenance and strengthening of tree cover, protection of natural site character, public access and trails and bushfire protection.

The National Capital Plan

The National Capital Plan requires the approval of the NCPA for infrastructure developments in 'Designated Area'. The plan also sets out policies in regard to non-designated areas including the Murrumbidgee River Corridor and Namadgi National Park. These policy statements include specifications for appropriate recreational use of these areas.

Park management planning

Plans of management are required for all areas reserved as Public Land under the Territory Plan and for Designated areas under the National Capital Plan. Management objectives for Public Land reserve categories are prescribed by the Land (Planning and Environment) Act 1991.

The purposes of plans of management are to: set the planning context, describe values, identify issues, expectations and constraints, propose directions for management including detailed objectives, aims, actions and priorities, provide a basis for evaluating management success, and provide a basis for the community to understand and comment on management intent. Any proposals, such as a large development, that have the potential to change the values of a reserved area should occur after management planning.

Interpretation Infrastructure Planning

There is a need for regional planning of the educational experiences available to ecotourists. While the definition of ecotourism suggests that educational or interpretation experiences are necessary, not all styles of interpretation are appropriate for all areas. For example, not all walking trails should have interpretation signs.

It has been shown that the most effective interpretation of sites is through face-to-face contact with park rangers and expert guides. These techniques do not require high levels of infrastructure; however, higher level infrastructure developments can widen the opportunities for education/interpretation. For example, pre and post-visit information including visitor centres, souvenir shops and audio-visuals are useful for educational messages.

It is important to mix these techniques and developments in a planned way. Interpretation planning on a regional basis for specific target ecotourism groups is desirable for the visitor, the tour operator and the land manager.

Actions

ACT Government agencies will develop detailed criteria for nature based tourism developments.

The ACT Parks and Conservation Service will develop business skills in park management and encourage partnerships with investors.

The ACT Government confirm the role of land managers in the decision making process for tourism developments.

Encourage the ecotourism industry and park managers to work together to develop regional interpretation plans for specific groups of tourists.

Integration

Establishing a regional theme

While the main purpose of this strategy is to discuss the potential for growth of a nature based tourism industry specifically within the ACT and the impacts and issues raised by the prospect of increased visitor traffic, nature based tourism does not stop at the ACT / NSW border. The NSW National Parks and Wildlife Service, in their submission, make the following observation,

" One of the Canberra region's major assets is the fact that it provides a diverse range of outdoor recreational activities - ranging from high quality walking tracks to wilderness pursuits - within several hours drive of the Canberra CBD. Collectively these areas provide for a range of recreational activities far greater than those available solely within either the ACT or surrounding NSW parks and reserves...

Canberra by and large is a base from which people can readily access the entire spectrum of outdoor recreational opportunities...This situation presents several promotional opportunities including that of tailoring tour packages suited to the needs of people travelling to the ACT from different locations...The NPWS is very keen to work in closely with ACT tourism initiatives in order to tailor our respective marketing activities in such a way as to best meet the needs of tourists to the region and to better promote the outstanding natural resources available here. "¹⁰

The opportunity to market the Canberra region as a nature based tourism destination can be realised if the state and territory resource managers and tourism agencies join with the tourism industry to plan a joint approach. The NSW NPWS approach is indicative of the cooperative spirit that does exist. Tourism NSW have recently established a regional office in Canberra to service the region which has been adopted by the Canberra Region Campaign. There is already a large degree of cooperation between the land management agencies of the two governments to this end.

Submissions from Tumut and Yass Shires have both raised the potential for joint ecotourism promotion. Tumut Shire Councillor, Geoffrey Pritchard, has suggested a regional database be set up, to include all activities and resources available within the region.

" Such a database would (for example) include a list of accredited guides and include the expertise of these guides."¹¹

Bindii Gove, Yass Shire Promotions Officer, has suggested that the Nature Based Tourism Strategy:

"...should include the Canberra Region, areas such as Brindabella National Park, Wee Jasper, Murrumbidgee River, Burrinjuck Dam...the main users of which are residents of the ACT region."¹²

¹⁰G.L. Worboys, Manager Southern Region, NSW National Parks and Wildlife Service: Submission on ACT Ecotourism Strategy

¹¹Geoffrey R Pritchard, Councillor, Tumut Shire: Submission on ACT Ecotourism Issues Paper

The local government areas surrounding the ACT administer the same types of natural environment as the ACT Government. It would seem logical that the area be promoted as a whole, provided that the resources required to promote are sourced from all interested parties on a derived benefit basis.

Administrative and regulative inconsistencies

Nature based tourism crosses state and territory borders. Natural resource managers from both sides of the border already communicate and are working towards consistent delivery for visitors. Regulative agencies having an impact on commercial operations do not seem to have the same level of communication. It is apparently more difficult to operate from the ACT than from NSW. ACT Traction Tours, in their submission points out that:

" the already existing costs of establishing a tour business in the ACT (where) I must register my vehicle as an omnibus even though it is an ordinary passenger vehicle, and pay the same rate of registration and insurance as a real 60 seater bus. - In NSW the type and cost of registration is related to an ordinary passenger vehicle. In the ACT I pay an annual tour operators licence fee \$400 - in NSW it would be once off fee of \$100."¹³

Currently, the Department of Urban Services is investigating the possibility of bringing licensing fees in the ACT, in line with NSW.

Action:

That the appropriate ACT Government agencies develop joint nature based tourism marketing opportunities with the adjacent local government shires.

That the appropriate ACT Government agencies, Tourism NSW, and the NSW National Parks and Wildlife Service meet regularly to discuss joint nature based tourism marketing opportunities.

That the appropriate ACT Government agencies meet with the NSW Road Traffic Authority, the NSW National Parks and Wildlife Service, tourism operators and Tourism NSW to investigate and address administrative and regulative inconsistencies affecting nature based tourism operations and industry.

¹²Bindii Gove, Yass Shire Promotions Officer, Submission on ACT Ecotourism Issues Paper

¹³Ron Kearon ACT Traction Tours, Submission on ACT Ecotourism Issues Paper

Regulation

The need to regulate behaviour derives from the need to manage visitor impacts and resource use and to ensure that appropriate contributions are made by those using the resource. All visitors to the ACT's national parks, reserves, parks and open spaces are subject to regulation.

Any examination of the existing regulative framework to consider the potential impacts of the growth of nature based tourism must also consider the fact that the majority of nature based tourists are independent travellers. Regulating the operations of commercial tour operators will only control a small percentage of the potential negative impacts of nature based tourism.

The regulations which generally apply to the administration of ACT national parks, nature parks and reserves regulate the behaviour of individual tourists and tour operators. Commercial operators are subject to all of that legislation designed to regulate the behaviour of individuals within national parks. The ACT Parks & Conservation Service will identify any need for further regulation.

Public submissions commenting on the ACT Ecotourism Issues Paper included the following:

"principles, policies, regulations and enforcement should be applied equally across the board and include anyone who moves across the landscape"

"Industry should develop a code of conduct for operators, but total self regulation has problems"

"Economic issues can easily take priority over environmental issues"

"Special conservation protection can only be adequately overseen by the public body, that is, the government."

"non-profit organisations must be included under the regulations"

"ecological sustainability must apply to all operators"

"Any obvious and continued breaches of this code should be punished with the withdrawal of accreditation of both the tour leader and employing operator, with a six month moratorium before that operator or tour leader may apply for re-accreditation."

The question of regulation of nature based tourism operators is linked with that of accreditation. The section on accreditation discusses the applicability of accreditation and possible accreditation schemes. Proposed accreditation relies very heavily on market forces propelling industry adoption of a voluntary scheme. Regulation in this environment becomes self regulation.

The National Ecotourism Strategy aims to;

- encourage industry self-regulation of ecotourism through the development and implementation of appropriate industry standards and accreditation
- encourage the removal of differences between State/Territory licensing regulations where these differences have a negative impact on operators
- review and audit the industry's performance in developing and implementing codes of practice for ecotourism in conjunction with natural resource managers and other user groups
- use licensing and permits to encourage sustainable practices by tour operators.

Licensing for all tour operators would have the advantage of allowing the ACT Parks and Conservation Service to control operators and to ensure that they adhere to industry best practice standards and that benefits are returned to the resource.

There are currently only a few commercial nature based tour operators within the ACT. There is however considerable growth potential in a number of tourism markets which are likely to provide significant numbers of tour groups to the nature based tourism resources of the ACT. The Asian inbound market and the domestic schools market are just two of these. The charter operators that will bring these groups are unlikely to be experienced nature based tour operators observing the same standards of environmental behaviour and product delivery as ACT based nature based tourism operators. Any regulative framework for tour operators should cover these part time nature based tourism operators.

Action:

That the existing regulative framework be reviewed by the ACT Parks and Conservation Service, to better control the quality of delivery and practices of all tour operators conducting nature based tours within the ACT.

That the existing regulative framework be reviewed by appropriate ACT Government agencies to better control the behaviour of the growing number of independent nature based tourists.

That the ACT Parks and Conservation Service observe the growth of nature based tourism and make recommendations to the government for regulation as and when the situation calls for action.

Accreditation

Accreditation in ecotourism is about quality of delivery and impact control. Both elements are becoming central to the discussion about the future of nature based tourism.

Quality of delivery is fundamental in any part of the tourism industry. Satisfied customers are the best form of promotion for any destination. In nature based tourism the question is not just about promotion. It is about the effect of the interpretive message and the future behaviour of nature based tourists. The recent growth in demand for nature based tourism is seeing:

"...cowboys enter the industry, make quick money and fade out to something else after milking the industry for all they can get..."¹⁴

Accreditation within the ACT must provide a mechanism to encourage professional, quality delivery of our nature based tourism experience for our visitors.

If the nature based tourism industry within the ACT is to become an ecotourism industry all operators must deliver a product which demonstrably meets the definition.

Much of the discussion about accreditation seems to be based on the assumption that operators are commercial tour operators. The overwhelming majority of nature based tourism, however, is by individual and independent visitors to our national parks, nature parks and reserves. Delivery of the ecotourism experience and the maintenance of appropriate behaviour then becomes the responsibility of:

- the natural resource managers;
- the commercial providers of various tourism services including accommodation, transport, interpretation and tours; and
- various non profit organisations organising nature based tourism experience.

Accreditation standards should apply to all of these groups. The National Recreation Industry Training Advisory Board make the point in their submission that.

" an operator is a provider of a service, irrespective of their funding, structure or ownership " and asks whether non-profit organisations' clients..." tread more lightly on the ground or cause less damage "¹⁵.

The application of those standards may vary with the nature of the operation. That variation may be because of delivery, with varying standards for different aspects of the industry; or because of funding, with varying levels according to the resources available to profit and non profit operations. Some care should be taken when

¹⁴submission, ACT Traction Tours

¹⁵ submission, National Recreation Industry Training Advisory Board

addressing this question. Many non profit organisations are, in fact, very well resourced with substantial cash flows.

Interpretation Australia, in their submission

"...urge the ACT Tourism Commission to consider very carefully the ecotourism training and accreditation practices being developed nationally by governments and industry groups...".¹⁶

The Commonwealth Department of Tourism has recently released a consultancy report on the introduction of a nation-wide accreditation scheme. Currently being circulated for public comment, the draft proposal suggests that accreditation in Australia be administered by a thirteen member board with the power to establish and review standards, grant or withdraw accreditation, establish policy, review and revise standards and participate in the development of competencies for ecotourism guides. It is suggested that this supervisory board should include individuals representing the organisations directly concerned with, affected by or interested in ecotourism. Ecotourism accreditation would be granted to the operating entity for products or locations meeting specified criteria.¹⁷

Training

Training and experience should develop the knowledge and skill of operators, interpreters and information providers. The ACT Parks and Conservation Service have a well developed interpretive training program which could be extended, on a cost recovery basis, to include private operators. This interpretive training service could be extended to the tourism training providers at the University of Canberra, The Canberra Institute of Tecnology and Tourism Training ACT & Region, providing a trained staff resource for the industry.

Training of operators within the ACT, to ensure a high standard in delivery, can be provided by any one of the training and educational bodies currently providing tourism training. The University of Canberra has the resources to offer undergraduate and post graduate courses which combine tourism and environmental components. In the long run, these courses will provide the managers and operators of nature based tourism facilities from natural resource managers to service providers. Similarly the TAFE and college courses available can provide tourism training with an environmental component while short courses offered by business colleges can include nature based tourism modules. The Inbound Tourism Operators Association (ITOA) currently has an accreditation system for tour guides. Park agencies could be involved in the interpretation aspect of accreditation training.

Tourism Training ACT and Region is the body charged with responsibility for providing a training resource to the tourism industry and should be encouraged to

¹⁶submission, Interpretation Australia

¹⁷An Investigation into a National Ecotourism Accreditation Scheme 1994; Manidis, Roberts Consultants for the Department of Tourism

include nature-based tourism training in their program. The tourism industry is adopting a career structure based on competencies which include experience and training. This scheme should be extended to include the skills required to contribute to ecotourism accreditation. Experienced industry people should be encouraged to train newcomers to the nature based tourism industry.

Action

That the ACT nature based tourism industry adopt the finalised national ecotourism accreditation scheme.

That all organisations, commercial, public and voluntary, be encouraged to apply for accreditation.

That any training standards established by either the national scheme or by any regional accreditation body be developed by Government agencies and industry, in such a way as to be adopted by the various education and training providers.

Ecological Sustainability

The idea of ecological sustainability is linked closely with the need for impact monitoring. Monitoring provides a substantive basis for decision making process from which to take management action to avoid degradation.

All submissions emphasised the need to base an ecotourism industry on ecological sustainability rather than economic viability. Although both are linked, "an ecologically unsustainable ecotourism activity will not survive economically".¹⁸ The most important consideration in the long term, for the whole community, is ecological sustainability. The Report from the Ecologically Sustainable Development Working Group discusses at length ecological sustainable principles and how these relate to tourism¹⁹:

- The improvement of individual and community well-being by following the path of economic progress that does not impair the well-being of future generations. More specifically this principle relates to the improvement in material and non-material well being; that is, ecologically sustainable tourism in this regard carefully considers the quality of experiences offered. Success is not measured by numbers but by the maintenance of a visitor's experience and an index of how well activities meet the principles of ecologically sustainable development.
- The provision of equity within and between generations meaning that a deliberate concern exists that current actions are undertaken within the context of their effects upon future generations; that actions do not diminish the species diversity and integrity of an ecosystem (that is, "natural capital"); that risk is dealt with cautiously; that it is acknowledged that a physical limit to the growth of natural resource use exists; and that community participation is used to avoid a local community's alienation from the development/conservation process.
- Protection of biological diversity and the maintenance of ecological processes and systems; tourism developments which regard this principle maintain bio-diversity and support the maintenance of ecological processes.
- Recognition of the global dimension meaning that tourism processes and practices in Australia should not encourage negative practices in other countries.

It should be acknowledged that sustainability is threatened by the tendency for tourism operators and developers to want to develop the best, most spectacular, most secluded and the most pristine sites first. It should be acknowledged that economics can be a strong force but that for nature based tourism to be sustainable, there needs to be stronger protection of natural areas.

Actions

That the ACT adopt the definition of ecological sustainability as defined by the Ecologically Sustainable Development Working Group (Final Report - Tourism).

That ecological sustainability be recognised by the nature based tourism industry in the ACT as the basis of nature based tourism.

¹⁸Submission 6; Section 2.1

¹⁹Opcit Final Report Ecologically Sustainable Working Group; pp35-40

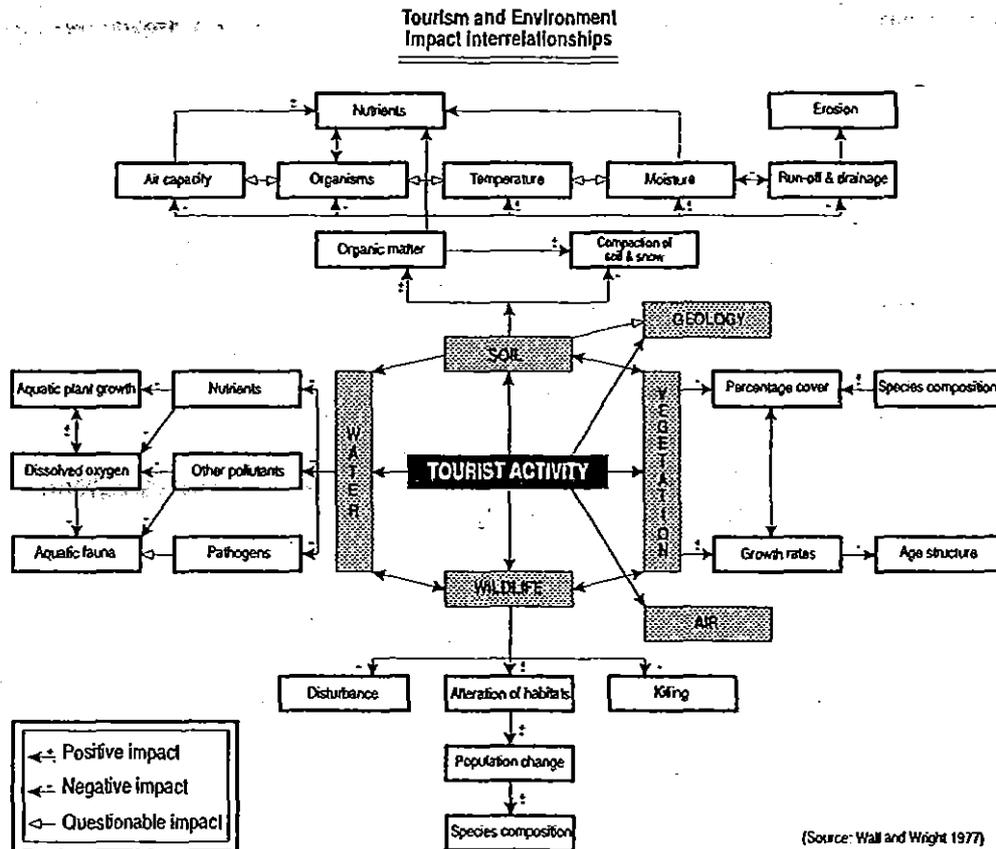
Impact Monitoring

Why do impacts need to be monitored?

Nature based tourism causes a range of minor environmental impacts in the ACT. There is potential for more significant impacts in the future as the number of tourists to natural areas are increasing. For example, visits to Namadgi National Park have increased by about 10% pa for the last 3 years.

To ensure ecological and economic sustainability, appropriate monitoring systems need to be put in place. If not monitored and managed carefully, further increases in tourism could reduce ecological sustainability, the long term economic viability of tourism ventures and the quality of the visitor's experience.

Types of impacts



Extreme examples of visitor impact such as off-road driving through sensitive sites or development in sensitive sites occasionally occur in the parks of the ACT. These are controlled through park management action and the legal and planning framework. Monitoring of these extreme cases is relatively simple as the impact is clearly visible and easily measured.

Incremental effects such as erosion or widening of walking trails, loss of vegetation at regular campsites, effects on wildlife and increased nutrients are far more common effects of tourism. Although land managers can react to incremental impacts by hardening sites and providing visitor facilities in heavily used areas, this is not always appropriate. Early warning of negative impacts is important so that appropriate action can be taken.

Impacts on vegetation communities, wildlife or even soil can be complex. For example, the impacts on a walking trail can include increased width, loss of ground cover, compaction, soil loss, changes in drainage, loss of organic matter, mud, exposed roots and increased hazards to users. The relative and absolute importance of these factors can change along a trail according to geology, soil type, slope, aspect and vegetation.

Other types of impacts include the effects of buildings and associated water supply, sewerage treatment, access and visual impacts. Social, cultural and economic impacts also need to be considered as these can be wide ranging and significant.

Measuring impacts

Several submissions stressed the need for quantitative measurement of the impacts of tourism on natural areas. Effective quantitative monitoring of incremental effects usually requires the establishment of baseline information or control sites and regular measurements.

Qualitative monitoring can also be designed on a formal basis with guidelines and/or training for the operator to assist with making judgements about physical impacts or more aesthetic values.

Formal monitoring, whether quantitative or qualitative is not objective as it is based on what the researcher believes are the most important factors to measure and a subjective estimate of the limits of acceptable change. The Precautionary Principle as applied to ecological management implies that we should not impose changes to natural areas where we are unsure of the effects. It is important that we err on the side of caution in determining levels of acceptable change.

Very little formal environmental monitoring takes place in the ACT largely because baseline studies are very costly and usually involve long term study. The high costs often result from difficulties in simplifying real situations for easy and meaningful measurement. Quantitative monitoring studies are best suited to simple situations where only a few indicators need to be measured. For example, impacts on water quality can be relatively easy to measure in some cases.

Park managers tend to be long term employees allowing local knowledge and expertise to build up. They are regularly looking for the impacts of visitors and have to make judgements about their severity and the effectiveness of remedial action. The skills of such managers should be incorporated into the design and implementation of formal monitoring programs.

Controlling impacts

The results of monitoring can mean that tourism activities may have to be reduced or altered in affected sites. Therefore, it is important that managers have the ability to reduce or modify visitation and use where levels of acceptable change are exceeded.

The ACT Parks and Conservation Service controls visitor impacts through park management plans, visitor education programs, the implementation of the Nature Conservation Act 1980 and through the subsequent actions of park managers. This works well where the impacts are predictable or easily observed and caused by independent visitors.

Where impacts are more subtle, specific monitoring programs are required. Some monitoring is taking place at Tidbinbilla Nature Reserve to assess the impact of the wildlife enclosures and other developments on the river water quality. Further study is needed to determine whether the results are caused by the original clearing of the valley, by the developments or by natural factors.

Privately managed developments (such as accommodation or recreation facilities) within or adjacent to natural areas can cause significant impacts through building of facilities, concentrated waste, runoff, introduction of species and changes in access. The activities of such developments are not well controlled through the above approach. Park management plans can be inadequate to deal with intensive impacts especially where the plan was drawn up before the operation was in place. Park managers may not have control of the educational messages delivered to visitors and often have no funds or authority to repair damage done. While leases and other agreements can include strict conditions, experience in other states is that these are not usually enforced because of claims by the operator of affects on their economic viability.

Actions

That ACT Parks and Conservation investigate further the need for formal monitoring at heavily used tourism sites and baseline studies where major developments are proposed.

That ACT Parks and Conservation ensure that monitoring programs consider social, cultural and economic impacts as well as impacts on natural systems.

That the ACT Parks and Conservation Service ensure that environmental monitoring of all likely impacts and necessary remedial actions are included as part of the costing of development proposals. The developer should pay for all costs associated with monitoring including administrative costs. The ACT Government should approve and administer monitoring programs.

That appropriate Government agencies ensure that developments are required to produce site management plans which include environmental monitoring and that monitoring is included in leasing arrangements with developers and operators. Investigate alternative or more comprehensive arrangements to the

leasing/licensing system for management of developments within or near to parks to ensure impacts can be controlled.

Economic Viability

Long term economic viability is dependent on the protection of the resource. The nature based tourism industry can only exist if it adopts ecologically sustainable practices and if the impacts of increased visitor numbers are monitored and controlled.

Economically, the industry will only grow following effective promotion of the ACT as a nature based tourism destination. Given the current low market awareness, the task of shifting perception could take some time. Much of the following discussion is based on a five year time frame, allowing for a significant level of promotion to domestic and international markets.

The ACT economy

The market analysis provides some estimation of the size of the nature based tourism market in Australia. From that a number of estimates were made of the potential for growth if the ACT were promoted as a nature based tourism destination. This growth could be as a result of either increased visitor numbers, or an increase in the visitor's average length of stay.

Based on figures discussed in the market analysis, the potential increase is conservatively around ten per cent, which translates to an increase in direct expenditure of \$30 million annually.

The viability of existing and potential commercial tour operators

Tour operations generally can be broadly divided into longer duration tours which usually start at a point outside the ACT, and day tour operations originating in Canberra. The percentage of visitors to the ACT who use local touring options is relatively small. This is reflected in the limited range of day tour product available.

Nature tourists are similarly divided into those arriving in the ACT on organised tours, those arriving independently and taking an organised tour, and those touring independently.

Precise figures are not available, but it would appear that the market for locally based ecotourism operators would be relatively small. The present tour operators source their clients largely from international visitors and from special interest markets.

If the ACT was able to achieve a growth in visitor numbers of around 100,000 per year at the end of five years, the number of visitors using local tour operators would vary between 10,000 and 15,000. A single four wheel drive operator needs around 1,000 clients per year to make a reasonable living. This means that the viability of the industry is limited to no more than ten to twelve operators.

The viability of potential accommodation and infrastructure projects.

Generally in Australia, the industry does not directly return significant benefits from tourism to parks. Instead, governments continue funding park management. This may be justified where there is a net benefit to the community from tourism. Infrastructure and impact management costs are rarely covered by visitor fees.

Infrastructure developments should demonstrate a net benefit to the parks. Experience in other states has shown that where an on-site business is proposed, a percentage of gross turnover, not a percentage of profit, should be returned to the park.

Involvement of private enterprise should be encouraged where there are more advantages over government-run business. Leases and contracts should have conditions linked to financial incentives and non-compliance conditions should be clear and enforceable by the land managers.

Leaving aside any discussion about the desirability of accommodation within our national parks their viability depends largely on promotion of the facilities. The existing visitor numbers are sufficient, if they can be persuaded to stay overnight in the area. The existence of accommodation may, in fact, provide the incentive needed to attract more visitors to the area.

Economic viability will be enhanced by effective marketing of the facility and the destination. That marketing must begin with research, before the facility is developed, to discover the product preferences of the potential nature base tourist. Promotion of the facility must focus on the link between the needs and preferences of the market and the attributes of the destination and the facility.

Actions:

That the Canberra Tourism Commission provide an advisory service to potential nature based tourism operators to ensure the commercial viability of existing and new operations.

That appropriate Government agencies the ongoing viability of nature based tourism be assessed having regard to overall benefit to the ACT economy.

That the viability of ACT Parks and Conservation Service nature based tourism operations remain a question for the marketing plan being developed for that organisation.

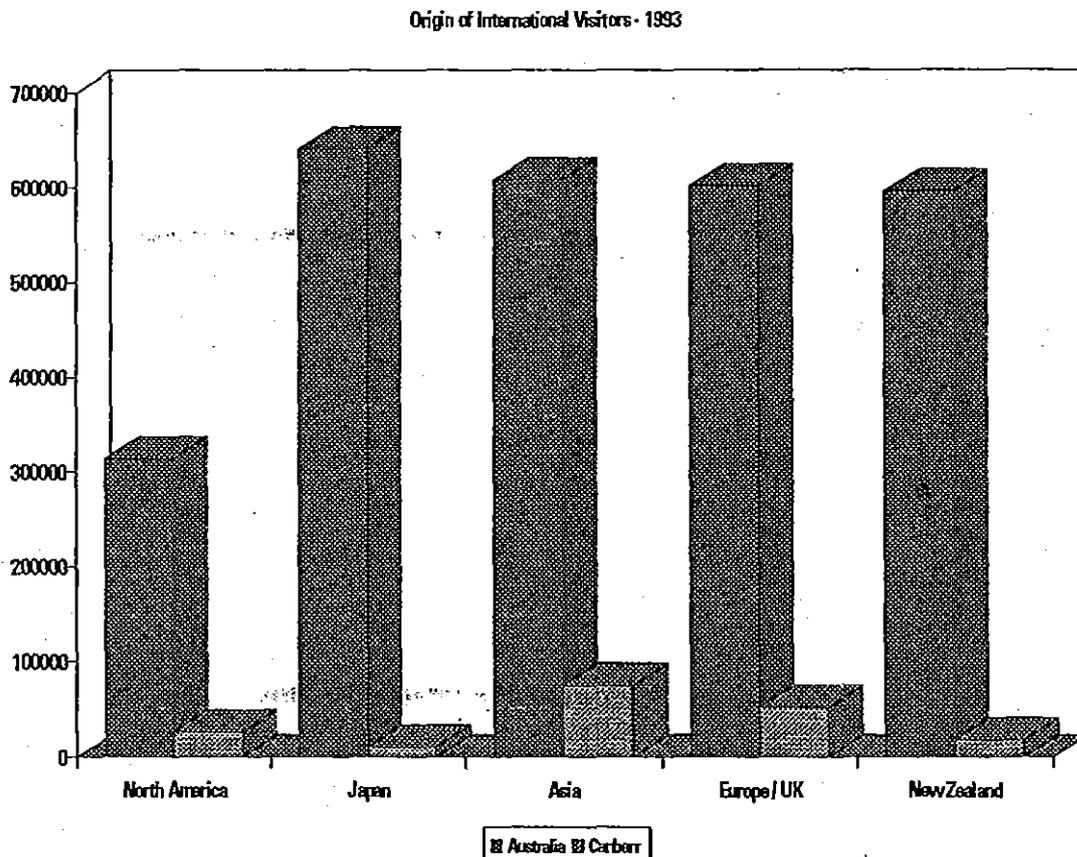
That any proposal for infrastructure development include a comprehensive business and marketing plan, provided by the developer.

The Market

The Tourism Market

Asia now provides the largest number of visitors to Australia with Japan, Europe/UK and Oceania closely following.

During 1993 there were 256,129 international visitors to the ACT. The graph below shows a breakdown of the origins of these visitors.



20

While the international tourism market is making a growing contribution to the Australian tourism industry, Australians travelling within Australia represent the majority of travellers. Australians made 12,181,000 trips during 1993.²¹

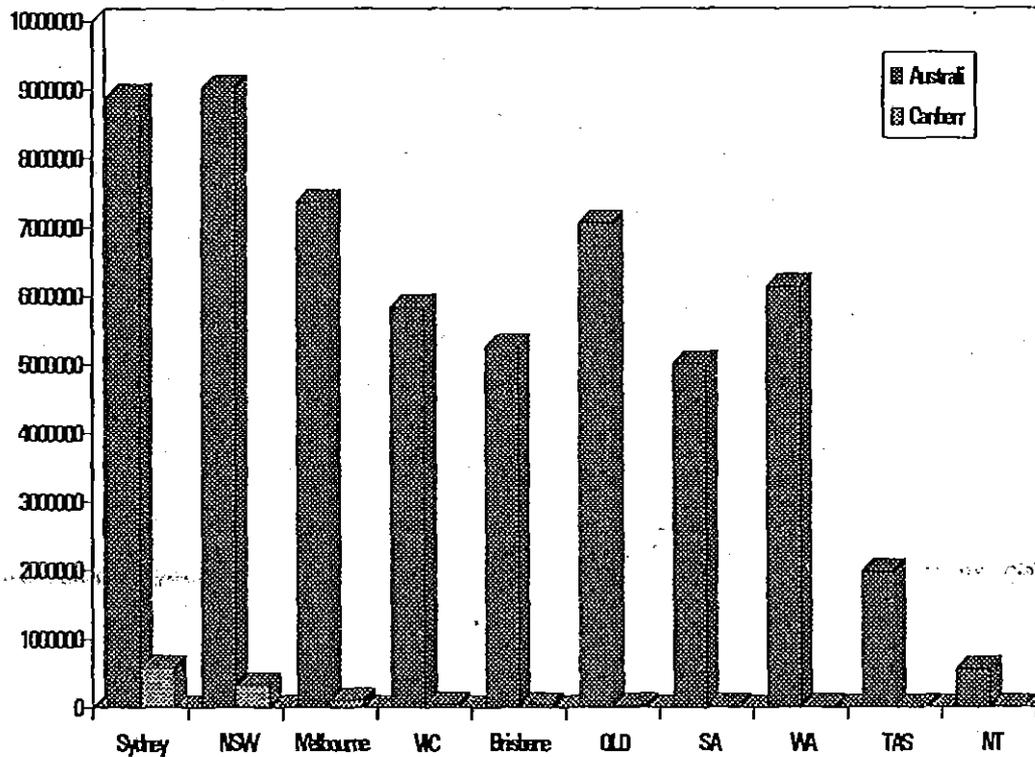
During the year ended March 1994 there were 1,405,900 Australian²² visitors to the ACT, most of whom came from the NSW

²⁰Bureau of Tourism Research, International Visitor Survey Quarter 4 1993

²¹Bureau of Tourism Research, Domestic Tourism Monitor, December Quarter 1993

²²Domestic Tourism Monitor ; March quarter 1994

Origin of Domestic Visitors



The Nature Based Tourism Market

The US Travel Data Centre report entitled *Tourism and the Environment* found that 8 million US adults have taken at least one ecotourism trip with a further 35 million adults projected as being likely to take such a trip in the next three years. These statistics should be seen as a guide to the potential within the US market only.

Very little research on the size of the nature based tourism market in Australia exists. In 1991 the Australia Council commissioned a survey to be conducted by the Bureau of Tourism Research as part of their Domestic Tourism Monitor. The results indicated that a significant proportion of Australians engage in some form of nature based activity when on holiday.

- Over 2,000,000 interstate trips included a visit to a national park;
- Almost 2,500,000 interstate trips included some bush activity;
- Botanic gardens received 850,000 interstate visitors;

The majority of these tourists travelled independently. Fifty four per cent travelled in their own cars. Only a part of the remaining train / coach / plane travellers travelled in groups.²³

The International Visitor Survey provides information about the activities of international visitors. Between fifteen and twenty five per cent of international visitors have a nature based tourism experience. This provides an inbound nature based tourism market of between 390,000 and 520,000 people.

There is then an estimated nature based tourism market of 2,500,000 domestic and 500,000 international visitors. The ACT has a domestic market share of nine per cent of interstate trips and eight per cent of international visitors. Based on that ACT nature based tourism can attract 265,000 visitors annually.

In the ACT, the Canberra Visitor Survey found that only two per cent of visitors found their way to Tidbinbilla Nature Reserve. They were not asked their intentions regarding Namadgi National Park, Googong Foreshores or Canberra Nature Park. The International Visitor Survey found that eight per cent of international visitors to the ACT went to Tidbinbilla Nature Reserve while twenty four per cent visited the Australian National Botanic Gardens.

The Nature Based Tourism Industry

Ecotourism operations begin with the managers of our natural resources. The ACT Parks and Conservation Service is a tourism operator in the same way as the managers of National Gallery of Australia, Dreamworld, or the Port Arthur Historic Site.

The provision of an ecotourism experience for individual travellers is largely the responsibility of the park managers. Education and interpretation is provided through visitor information centres, interpretive signs and ranger interpretation.

Nature based tourism activities currently include:

- Individual and group adventure pursuits such as diving, canoeing, sailing, climbing, cycling, horseriding, skiing and caving;
- Less active individual pursuits such as car touring in national parks, picnicking, short walks and sightseeing; and
- Group tourism such as four wheel drive operations, cruise operators and a growing number of larger tour operations.

The private sector industry is characterised by small operations consisting of a limited number of specialised accommodation operations, coach and four wheel drive tours, adventure tour operators and some specialised wilderness transport operators.

²³Bureau of Tourism Research, *Domestic Tourism Monitor*, December Quarter 1993

The size of the industry is difficult to estimate. The Green Jobs in Industry Research Report prepared by the Australian Conservation Foundation and the ACTU found that:

"The lack of an industry agreed definition of what constitutes bona fide ecotourism leads to difficulties when attempting to establish the size of the Australian ecotourism industry. For example in the strictest terms the industry may be limited to a very few highly specialised operators. Whereas if the broadest marketing perspective of the term were applied, the sector could encompass 1500 - 2400 nature based operations."²⁴

The GJU compiled a list of some 440 self nominated ecotourism operators from available databases such as tourism agency lists.

The report went on to make the following observations about the ecotourism industry:

- The industry consists predominantly (87%) of small scale businesses employing less than twenty employees;
- The industry is growing rapidly with 42% of operations commencing since 1988;
- Domestic tourism accounted for 63 per cent of operators business.²⁵

Competition for the attention of nature based tourists will intensify in the coming years. All Australian States and Territories are examining the growth potential within this market. Some have produced ecotourism product. Cradle Mountain, Kakadu, Cape Tribulation, Wilpena Pound, The Grampians, Monkey Mia and the national parks of NSW are all established within the major nature based tourism markets the ACT would seek to target. Many of the less well known destinations are examining the market potential and developing their own ecotourism marketing approaches.

The ACT must find a competitive advantage within particular market segments. It may be that our proximity to certain markets will provide that advantage, or it may be that our position as Australia's premier cultural destination will provide the means to develop the ecotourist within the cultural tourist. The means to achieve this will be discussed later in this strategy.

Nature Based Tourists

Nature based tourists are not a discrete group, travelling only to find a nature based experience. Travellers are looking for a range of experience. A traveller between Sydney and Brisbane will enjoy a rural tourism experience staying on a farm, a cultural tourism experience visiting a heritage site or museum and a nature based tourism experience visiting a national park.

²⁴Australian Conservation Foundation and Australian Council of Trade Unions: Green Jobs in Industry Research Report. May 1994 pp 173

²⁵Ibid;pp173

North American researchers have found the nature based tourists don't necessarily comprise an alternative speciality market at all, but are often found squarely within the ranks of mainstream travellers.

"They are not necessarily younger or in any better physical condition than those who book a week at Disney World or a Caribbean cruise. And for all their vaunted independence, they often seek the the framework of organised tours as frequently as other tourists. Yet other studies suggest that they do consider themselves independent travellers, distinguishing themselves from other travellers. They tend not to use traditional travel agents for more than basic travel arrangements, preferring to find their holiday product through word of mouth, publications or organisations they belong to."²⁶

Nature based tourism is the way people use the tourism product, what they do when on holiday. The key to understanding the nature based tourist is in understanding what they expect from a nature based tourism holiday.

Not all tourists value a nature based tourism experience, the ones that do place particular value on certain things. Some research on the motivations of Canadian nature based tourists found that the ecotourist population holds it's travel motivations more strongly than the general population,

"Canadian ecotourists [nature based] are most interested in wilderness, water, mountains, parks and rural areas, being physically active, new lifestyles, meeting people of similar interests, adventure and seeing the most in the time available. They are least interested gambling, amusement parks, nightlife, big cities, watching sport, doing nothing, indoor sports, shopping and resort areas."²⁷

Australian nature based tourists have been identified, by a number of researchers.

In 1987, research conducted by Quantum Market Research for the National Capital Development Commission provided an analysis of potential tourism markets for the ACT. The research identified a number of discrete groups within the population. One of these groups "The Get Away From It All Tourist" has the following attitude profile.

"This holidayer rejects the attractions of the city...the outdoors constitutes a strong attraction...Camping or caravanning is their preference - offering them the chance to escape from people and the crowds...

Children are integral to their holiday experience...(They are) drawn from all age groups, but the 30 - 49 year olds are particularly strong in this group. They are more likely to be from Melbourne than Sydney."²⁸

The Tourism Banks research, conducted in 1989, identified a group they called the *Anti - Tourist*.

²⁶Lester Reingold " Identifying the Elusive Ecotourist" in Going Green October 1993

²⁷Paul F.J. Eagles The motivations of Canadian ecotourists Ecotourism, Incorporating the Gobar Classroom, 1991 Conference Papers, University of Queensland pp 12

²⁸Quantum Market Research, The A.C.T. - A Segmentation of Potential Markets Research Report July 1987

"The main trend setting group. Inner directed, individual, active, avoids commercial ventures, a committed conservationist and environmentalist. Pioneer and adventurer. Well educated, free spender."²⁹

The characteristics of the Anti -Tourist are, in many minds, those of the archetypal nature based tourist, with one exception. The nature based tourist has been seen as budget oriented, not free spending.

Recent research has found that nature based tourists are free spending.

"Summarising the results of a number of studies during the past five years one might identify the average (nature based tourist) as between the ages of 35 and 70, with more than average education and higher than average income, and with previous travel experience."³⁰

The Bureau of Tourism Research will be undertaking a study of ecotourism . The study is examining the ecotourism and nature based tourism sector in Australia and will be building a national profile on the industry, by examining relevant tourism; analysis of the DTM and the IVS to determine demand-side characteristics of the market; and the collection of additional qualitative/quantitative data through surveys.

The nature based tourism market is substantial and growing. There is sufficient information available about the characteristics of the nature based tourist for the Canberra Tourism Commission and the ACT Parks and Conservation Service to clearly identify the methods, the means and the message required to develop the market's potential.

The market analysis above provides us with a number of strategic reference points.

²⁹The Joseph Banks Group Pty Ltd. Tourism Banks: July / August 1989 pp16

³⁰Lester Reingold " Identifying the Elusive Ecotourist" in Going Green October 1993

Actions;

(For the Canberra Tourism Commission)

The target market is people aged between 30 and 49, with children, with above average income but as likely to be blue collar as white collar.

Target Sydney because of its proximity and Melbourne because of the market's stronger inclination towards nature based tourism.

Target North America because it is the strongest international nature based tourism market and Asia because of it's growth potential in tourism and in nature based tourism.

Communicate with and distribute information to domestic nature based tourists through means other than the traditional.

The Resource Base

Nature based tourism already exists in the ACT. A number of low-impact 4 wheel drive tours operate, taking visitors into Namadgi National Park and providing them with an educational experience of the ACT's environment. In addition Namadgi, Tidbinbilla Nature Reserve Visitor Information Centre and the Australian National Botanic Gardens perform an important function in educating the visitor and interpreting the biological diversity of the ACT/Australia. Bushwalking, sightseeing, birdwatching, camping, white water rafting and mountain bike riding are also popular activities in the ACT National Parks and Reserves, which can be included under the adopted definition of ecotourism. It is however essential that these activities involve educational/interpretational elements and that they are managed to be ecologically sustainable.

Canberra's nature based tourism potential is based upon the appeal of the national parks, reserves and open spaces of the ACT, notably Namadgi National Park, Tidbinbilla Nature Reserve, Canberra Nature Park and the Murrumbidgee River Corridor.

Namadgi National Park:

Namadgi is the Aboriginal name for the mountains southwest of Canberra. The national park covers 40 per cent of the Australian Capital Territory and is the northernmost of the Australian Alps National Parks.

Namadgi has a wide variety of plants and animals in habitats ranging from the broad grassy valleys to the snow gum woodland. The park has an interesting history covering aboriginal prehistory and the settlement in the 1830's by Europeans.

Driving through the park provides views of majestic mountain country and the park provides 150 kilometres of marked walking tracks. There are two campgrounds within the park and many picnic areas. All Namadgi streams other than the upper Cotter River, which supplies water to Canberra, are classified as trout waters.

The Namadgi Visitors Centre provides an interpretive introduction to the park through hands on displays, an audiovisual and publications.

Canberra Nature Park:

Canberra Nature Park consists of hills and ridges within the Canberra area. Most of these areas were once cleared for grazing, but are now returning to a more natural state through regeneration or planting. The hills of Canberra Nature Park differ in their characteristics ranging from dry eucalypt forest to grassland. The park is managed by the ACT Parks and Conservation Service and has been provided with excellent interpretive facilities.

Canberra Nature Park is an underused nature based tourism resource which has potential for those visitors who have limited time in Canberra, particularly organised tour groups.

Jerrabomberra Wetlands:

Jerrabomberra Wetlands provide a series of wetland habitats which support a rich and diverse bird fauna, including most of the 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. Part of Jerrabomberra Wetlands are used as a stopover by migratory waders, including species which are the subject of agreements between Australia and both Japan and China. Jerrabomberra Wetlands offers enormous potential for the development of a centre for Wetland education to allow students, locals and visitors an opportunity to enjoy and learn about Wetland habitats. Currently birds can be viewed from specially constructed observation hides.

Murrumbidgee River Corridor:

The Murrumbidgee River Corridor protects the natural, cultural and recreation and landscape values along the river in 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 Murrumbidgee River Corridor is a resource largely used by Canberra residents. Its promotion should be restricted given the extensive use already being made of parts of the corridor.

Googong Foreshores

Googong Foreshores is located 10 kilometres south of Queanbeyan. The area is managed by the ACT Parks and Conservation Service as a water catchment area, a recreation area for public use and as a wildlife refuge.

A variety of activities can be enjoyed at Googong including sightseeing, fishing, bushwalking, picnicking, canoeing and sailing. The southern end of the park offers visitors a heritage site at London Bridge Homestead.

Tidbinbilla Nature Reserve:

Tidbinbilla Nature Reserve is situated 40km from Canberra. The reserve can be reached by following Tourist Drive Number 5. The trip takes about 45 minutes from the city centre via the Cotter Road.

The reserve's particular strength is the wildlife enclosures which are designed to allow visitors to see a selection of Australian animals in an essentially natural environment. The walk-through enclosures range in size from 13 to 26 hectares. Animals and waterbirds can be observed without fences obstructing the view.

Tidbinbilla Nature Reserve also provides nature trails and mountain walks through a variety of habitats. The ACT Parks and Conservation Service conduct ranger guided walks, evening walks, spotlight walks and nature appreciation classes.

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 "lookers" to "doers".

The high level of interpretation and the practices of the ACT Parks and Conservation Service provide an opportunity for Tidbinbilla to deliver a nature based tourism product which is a true ecotourism product.

The reserve has more visitor facilities than other parks. With further investment and careful planning, the valley floor and wildlife enclosures could possibly cater for an increase in visitors without causing significant environmental damage.

Tidbinbilla has the potential to become a central feature in the promotion of the ACT as a nature based tourism destination.

Canberra's Lakes

Canberra's urban lakes - Lake Burley Griffin, Ginninderra and Tuggeranong and their foreshores offer recreational opportunities. These include sailing, swimming, canoeing, fishing from the shore or from a boat (electric outboards only), picnicking, or walking. Well developed picnic areas with facilities are located in various foreshore areas. Water quality is monitored in all the lakes.

Aboriginal sites in the ACT

Aboriginal sites in the ACT represent occupation dating back approximately 21,000 years and include axe grinding grooves, scatter sites, rock procurement sites, camping, art and ceremonial sites. Some of these are open to the public.

[Service Providers are listed at Appendix A.]

Marketing Strategy

Competition for the nature based tourism market will become intense in the coming years. All of the states and territories have developed, or will develop, nature based tourism strategies. The resources which they can allocate to the promotion of their destination are considerably more than those of the ACT. The Canberra nature based tourism industry must develop a position within this market which is different to that of other destinations by working toward developing a reputation as a destination which delivers a quality nature based tourism product.

Providing Quality Delivery

The interpretive facilities at Namadgi and Tidbinbilla are of a high standard. As are many of the interpretive facilities within ACT national parks, reserves, parks and open spaces. If however, the ACT is to compete with the delivery of other destinations, an interpretive plan must be developed, reviewing existing services and relating them to national and international standards. This plan should also consider the interpretive facilities of private sector operators.

Amenities such as toilet facilities, camping grounds and roads for nature based tourists should be of a consistently high standard and should reflect environmentally sustainable practice. The quality of amenities within Tidbinbilla Nature Reserve or Canberra Nature Park should exhibit best practice in nature based tourism in the same way as the facilities in our major institutions and hotels exhibit best practice. The quality of the visitor facilities at many sites such as Tidbinbilla Nature reserve, parts of the Murrumbidgee River Corridor and our visitor centres are as good or better than many Tasmanian Parks.

The ACT Parks and Conservation Service presentation of communication material such as brochures is currently of a high standard. The Service should be resourced to provide both the volume and the high standard. Private operators should be encouraged to produce high quality presentation material. This does not necessarily mean expensive full colour glossy brochures. Nature based tourism operators should seek professional assistance through the Canberra Tourism Commission's tourism development service. The Commission itself should address the lack of a general nature based tourism publication by producing a quality motivational publication to entice nature based tourists to the ACT.

The presentation of equipment and personnel is often the point where nature based tourism and tourism operators generally often fall down. The client who purchased a tour in Seattle based on the presentation of a quality brochure and the recommendation of a travel agent is entitled to expect a tour guide dressed professionally, driving a vehicle which is clean, comfortable, reliable and appropriate for the task. The client will decide what is professional presentation. Any nature based tourism operators would be well advised to research the expectations of the clients from whom they expect to profit.

The ACT Parks and Conservation service should review the current presentation of public contact personnel and equipment by examining practice in other nature based tourism destinations and the expectations of visitors and applying those standards to ACT operations.

The industry should seek to develop a reputation for reliability and consistency. Operators promoting a particular tour or product should not be in a position where they cannot deliver as promised. Managers should attempt to give adequate warning to tour operators when access arrangements are to be changed, to allow operators to adjust their promotion actions and tour schedules. Tour operators should maintain a consistent standard of delivery among their drivers and the quality of the tour content should not vary. Visitors to the Canberra Nature Park should receive the same level of interpretation and the same standard of facilities as visitors to Tidbinbilla Nature Reserve.

All people involved in public contact should show a willingness to help visitors and to provide service. All ACT Parks and Conservation Service public contact staff should receive customer contact training. Private operators should be invited to participate in that training.

The tourism industry generally would benefit from nature based tourism product training. Front office staff from the Canberra Tourism Commission, accommodation house front offices and tourist attractions should be taken on familiarisation tours of the key nature based tourism areas.

The ACT nature based tourism industry needs to develop a culture of being visitor oriented. People throughout the industry from rangers to tour operators to park managers must work to understand the visitor, to know how the visitor perceives the ACT nature based experience, and to deliver the quality experience the visitor wants.

Tour operators, park rangers and information centre staff have regular contact with visitors. This contact should be developing an appreciation of the visitors needs. This feedback mechanism can be formalised through occasional simple questionnaires or kept conversational. There should be some form of regular reporting to develop action from this information.

The Canberra Tourism Commission, the nature based tourism industry and the ACT Parks and Conservation Service should conduct a program of regular qualitative market research to know what service attributes are important to visitors and to understand what drives the visitor's choice of destination, and quantitative research identifying how the market perceives the ACT, the different groups within the visitor market. This will lead to a message with a strong set of associations for the potential visitor, leading to a strong positioning of the ACT in the mind of the nature based tourist. They should also meet regularly to considering how to provide solutions to visitor problems and to look for unsatisfied visitor needs. The consistent objective is to deliver quality to nature based tourists.

Providing Peripheral Service

The provision of peripheral service is often used as a means to differentiate one service from another. An accommodation house whose core business is to provide beds will add peripheral services like swimming pools and fitness centres in order to obtain a competitive advantage.

In nature based tourism the core service is providing the visitor with a nature based experience which is educative, interpretive and sustainable. The ACT can provide an ecotourism service which goes beyond that, by looking to combine the nature based tourism experience with other forms of experience. The ACT nature based tourism industry could provide peripheral services to the conference and business markets, providing visitors with a unique experience.

Canberra is Australia's national capital, the home of many of the nations cultural treasures. This provides the city and the region with a unique position within domestic and international markets. Our nature based tourism industry will benefit from the links which may be developed between cultural and ecological experience.

Distribution

Within the tourism industry, the traditional distribution channels are wholesalers, tour operators, travel agents and information centres. Most nature based tourism destinations distribute information about their product through those channels.

The opportunity to make the Canberra product different exists through identification of less traditional and more effective distribution channels such as organistaions whose members are likely to be nature based tourists, or commercial organisations whose target markets have the same profile. Some examples include the Body Shop chain and Katmandu clothing. Research identified in the market analysis provides support for this approach. Nature based tourists are not traditional information channel users and are more likely to gather information from friends or through day to day contact with information.

The largely untapped visitor traffic which flows to the Kosiousko National Park should be seen as an opportunity to address an audience which would be inclined to nature based tourism.

Market Growth

Visitors to ACT national parks, nature park and reserves come from two sources. Residents of the ACT and visitors to the ACT. The following discussion will relate largely to the latter group although some of the recommended activity will impact on the former.

Increasing Market Share:

Only a relatively small percentage of visitors to the ACT visit our nature based tourism facilities. That share will be increased by some of the strategic actions discussed above. There are however a range of tactical actions which should be taken on a continuing basis to attract more of the existing visitors:

- Advertising in the local media and through tourism information media. There are a number of publications and maps which guide visitors in Canberra. ACT Parks and Conservation should take advertising space and negotiate editorial;
- Distribution of brochure information to all tourist information points. These include visitor information centres, accommodation houses and attractions in Canberra. Outside Canberra the information should go to normal distribution points such as the NRMA and to more market specific points such as retail enterprises sympathetic to ecologically sustainable ideals;
- Training and familiarisation of visitor information - centre staff, accommodation house staff and other key information providers. The Canberra Tourism Commission have an ongoing familiarisation program for the local tourism industry and visiting travel agents, tour operators, motoring organisation staff and journalists. This program should be developed to include nature based tourism resources and nature based tourism target markets;
- Short term promotions to attract the attention of visitors and the media. This could include an event such as the opening of a new facility or development of a promotion such as a Canberra Nature Park Awareness Week; and
- Permanent interpretive displays in key information points such as the Visitor Information Centre on Northbourne Avenue, which attracts 250,000 visitors each year and the National Capital Exhibition at Regatta Point, which attracts 300,000 visitors each year. The Service should also negotiate with the major attractions for a small display space at the exit point from each attraction.

Market Development:

Looking beyond the existing visitor market, there may be opportunities in geographic or demographic market segments which have not yet been realised.

The available research indicates that the most environmentally aware international markets are North America and Europe. The Asian market is beginning to demonstrate a preference for nature based tourism product and is staying long enough to include the ACT and nature based tourism in the itinerary. Japan is beginning to show potential for niche marketing to particular interest groups. In Australia the attraction of the national capital for school groups and the growing emphasis on environmental content in school curricula provides the opportunity to

market ACT nature based tourism to schools. There is considerable potential within the convention market to provide a nature based experience close to the major population centres and to the resources of the national capital.

Action:

That the ACT Parks and Conservation Service review the quality of amenities within ACT national parks, parks, reserves and open spaces with particular reference to the standards of other destinations.

That the ACT Parks and Conservation Service develop the ACT as the leading interpretive destination.

That the ACT Parks and Conservation Service, private nature based tour operators and the Canberra Tourism Commission meet to develop a consistently high quality approach to production and presentation of brochures.

That the Canberra Tourism Commission produce a quality brochure on nature based tourism in the ACT.

That Canberra nature based tour operators establish, within a code of practice, standards for presentation of personnel.

That the ACT Parks and Conservation Service review the presentation of public contact personnel and equipment.

Tour operators and the ACT Parks and Conservation Service work together to guarantee reliable product delivery.

That the Canberra Tourism Commission coordinate a program of tourism and customer relations training for the nature based tourism industry.

That the ACT Parks and Conservation Service extend their interpretive training program to operators and to tourism training providers.

That the Canberra Tourism Commission coordinate a series of tourism industry familiarisations to ACT nature based tourism areas.

That the Canberra Tourism Commission and the ACT Parks and Conservation Service develop a research program to measure the volume of nature based tourism to the ACT and from that, identify the demographic and geographic characteristics of visitors.

That the Canberra Tourism Commission and the ACT Parks and Conservation Service conduct focus group research among nature based tourists to identify perceptions, motivations and expectations; and to identify opinions toward nature based resources.

That government and private sector participants establish client feedback mechanisms and meet regularly to discuss client feedback and to identify solutions to problems.

That the ACT Parks and Conservation Service form a strategic liaison with the Canberra Visitor and Convention Bureau to develop a nature based tourism product for the convention market.

That the ACT Parks and Conservation Service liaise with major accommodation providers to develop a coordinated approach to the business market.

That the ACT Parks and Conservation Service and the Canberra Tourism Commission discuss joint marketing possibilities with the National Gallery of Australia, the Australian War Memorial and other national institutions.

That the Canberra Tourism Commission identify and develop distribution channels appropriate to nature based tourism.

That the ACT Parks and Conservation Service develop a marketing plan which targets nature based tourists within the existing visitor market.

That the Canberra Tourism Commission include North America in their international priority markets, promoting ACT nature based tourism.

That the ACT Parks and Conservation Service expand their schools program to include a program for interstate schools visiting the ACT.

That the Canberra Tourism Commission's promotion to schools include information on ACT nature based tourism resources.

That the Canberra Visitor and Convention Bureau be encouraged to present the ACT as a nature based tourism destination.

Service Providers

ACT Parks and Conservation Service

The ACT Parks and Conservation Service is the ACT's largest ecotourist operator. Their ranger guided nature walks attract approximately 16000 people every year; activities focused around the walks include demonstrations, hands-on experiences, spotlighting and bike tours. Various themes and topics are covered during the walks such as: ecology, fauna and flora, water catchment, geology, European and Aboriginal history, fire conservation and promoting healthier lifestyles. Walks are also constructed around special events such as Wattle Time, Arbour Week, International Women's Day, Frog Week and World Water Day. Draft objectives for the ranger guided walks program are centre upon five central areas which aim to increase the ACT community's :

- Orientation and recreation of parks and recreation experiences available;
- Awareness of wildlife and environmental issues, as well as an appreciation of the ACT's natural and cultural resources;
- Understanding and acceptance of park management policies; to promote the
- Image and Identity of the parks and resource managers; and to encourage people to

Act positively for the environment.

A survey conducted by the ACT Parks and Conservation Service found that approximately 50% of people attending the walks had not been on one in the last 12 months. This is viewed as an appropriate balance for the other half of people who do return indicate that the walks are popular and are achieving the identified objectives.³¹

Australian National Botanic Gardens

The Australian National Botanic Gardens are located on the slopes of Black Mountain and house the world's finest collection of Australian native plants. A full educational program is available and self-guided tour packages are available for the Aboriginal Trail and White Arrow Trail.

³¹"Ranger Guided Walks: The Far Side of Ecotourism"; Arman, Collins and Tatnell; Embracing Interpretation in the Year of Indigenous Peoples - Proceedings of the 1993 National Conference of the Interpretation Australia Association; pp127-136)

The Gardens currently attract a significant proportion of visitors to Canberra. The ACT Parks and Conservation Service should join with the Australian Nature Conservation Agency to promote a link between Canberra Nature Park and the Australian National Botanic Gardens.

Delivery of this product to tourists is largely the responsibility of the ACT and Commonwealth Government agencies responsible for managing the resources. There are, however, a number of private sector operators providing a nature based tourism experience.

ACT-Traction Tours

Specialises in tours through the mountains and surrounds of the ACT including Morton National Park, the Brindabella Mountains, Namadgi National Park, Mount Kosciusko and the South Coast.

Bunyip Bush Safaris

Regular day and extended trips from Canberra to the Snowy Mountains and beyond, highlighting Australian wildlife and scenery. Small groups preferred and interpreters can be organised for additional cost.

Bush Travellers

Day trips, overnight wilderness walks (or longer expeditions) or four wheel drive tours. Also specialise in heritage tours. Photographic workshops conducted.

Environment Tours

Sponsored by the Canberra and South East region Environment Centre and the Conservation Council, Environment Tours provide mini-bus excursions into the districts surrounding Canberra. Tours help visitors to learn about native flora and fauna, the aboriginal and early european history of the region and its geology. The emphasis of environment tours is on advocacy and action on environmental issues as well as being committed to environmental education.

Gondwana Dreaming

Natural science discovery tours to Australian and overseas destinations for people who share an interest in the natural environment. The focus of the tours is the environment from the geological origins of a region to each area's unique native flora and fauna.

MudMaps

Daily four wheel drive tours into the Brindabellas, to explore the beautiful scenery and experience authentic Australian tea and damper. Interpreters available at extra cost.

White Water Rafting - River Runners

River Runners provides a series of white water rafting experiences ranging from kayaking to one day trips on the Murrumbidgee River to four days on the Shoalhaven River, to five day intensive hands on training/theory excursions.

Brindabella Valley Horse Trails

Spend from one day to a week exploring the beautiful Brindabella Ranges.

Brindabella Valley Horse Treks

Horse treks in very picturesque country. Duration 1-4 days or longer if required.

Highland Air Tours

Tours to Snowy Mountains, flying over Brindabella Mountains, landing at Khancoban.