



**TTFAustralia**  
Tourism & Transport Forum

A circular collage representing Australia. In the center is a white silhouette of the Australian continent on a red circular background. Surrounding this are several smaller images: a person in a wheelchair on a wooden boardwalk, a sandy beach with a wooden walkway, a person on a zipline, a person standing on a rocky outcrop with Uluru in the background, a person in traditional Indigenous Australian body paint, a modern building with a curved roof, and a body of water with reeds. The collage is divided into segments by white lines, with some segments being solid colors (red, blue, green, yellow).



# Project Partners

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Front cover photo: Kingfisher Bay Resort, Fraser Island. *Courtesy of Tourism Queensland*

# From the Minister



Australia's national parks and world heritage areas are home to many of our great natural icons. Images of Uluru, the Great Barrier Reef, the Blue Mountains and our many other natural treasures have come to symbolise Australia. They are powerful symbols too – attracting visitors from all over the world.

These visitors make a significant contribution to our \$81 billion tourism industry. In 2006 domestic and international nature-based tourists spent approximately \$23 billion during their travels in Australia.

But the health and protection of our national parks cannot be taken for granted. With the size of the national parks estate continuing to grow, and threats such as climate change posing new challenges for park managers, the task of maintaining our parks is becoming more complex and more expensive. We need to find new, innovative ways of making our parks financially sustainable so that they are better able to manage for conservation outcomes, as well as delivering a high quality visitor experience.

A stronger partnership between tourism and conservation will be essential to meeting this challenge.

An integrated approach to marketing our natural tourism assets will inspire more visitors. Better infrastructure will allow these visitors to enjoy our parks, while minimising their impact on the park environment. New visitor experiences and tourism products will help visitors to learn about, and appreciate, Australia's unique ecology.

Most importantly, partnerships between parks and tourism will provide a sustainable source of revenue for conservation, park management, Indigenous communities and regional economies.

This report has been developed through the cooperation of people in all Australian states and territories, and across the government, business and environment sectors. I congratulate everyone who has participated in the process in the spirit of partnership, and I look forward to taking this agenda forward.

**HON FRAN BAILEY MP**  
**Minister for Small Business and Tourism**

# From the Managing Director



The Natural Tourism Partnerships Action Plan is a bold initiative to promote investment in sustainable natural tourism which directly contributes to conservation of our National Parks and Protected Areas.

Over the last 12 months TTF has made a major policy commitment to sustainable natural tourism. This Action Plan is the culmination of our Natural Tourism Partnerships Initiative, launched by the Federal Minister for Small Business and Tourism, the Hon Fran Bailey MP, in April 2006. The Initiative continued the work of our landmark 2004 study *A Natural Partnership: Making National Parks a Tourism Priority*.

The Natural Tourism Partnerships Initiative has been well received, with solid support from key stakeholders across industry, tourism and park agencies. TTF has also consulted closely with both the Australian Conservation Foundation and World Commission on Protected Areas on this project.

Natural tourism does not mean high-rise hotels in national parks or turning the natural estate into amusement parks. Genuine partnerships will build innovative park visitor experiences that will attract and educate visitors, while providing sustainable revenue for tourism operators and park conservation.

It is paramount that we create a new paradigm of trust between the conservation and the tourism sectors. Tourism

and conservation have a remarkable capacity to enjoy a symbiotic relationship; and this potential must be unlocked through intelligent policy decisions – especially as we face up to the environmental, regulatory and economic impacts of climate change.

Our report illustrates significant financial and regulatory barriers facing park agencies and industry in progressing partnerships that share conservation and financial objectives. Addressing these barriers is the key to creating successful partnerships and the focus of the Action Plan.

I would like to thank the sponsors and stakeholders who provided valuable time and input to this Action Plan. I particularly wish to thank our principle partner, the Department of Industry Tourism and Resources, for supporting the Natural Tourism Partnerships Initiative.

TTF sees this report as an important tool assisting informed policy decisions for National Parks and Protected Areas and I pay tribute to the TTF team who produced this policy framework: Evan Hall, Kris Madden, Sonja van Oosten, Joyce DiMascio and Stewart Prins.

TTF will go forward with this Action Plan, proudly advocating a partnership approach with industry, tourism agencies, park agencies, the conservation sector and government.

**Christopher Brown | Managing Director  
TTF Australia**



# From the Conservation Sector



The Australian Conservation Foundation and TTF Australia have a long term partnership to build stronger relationships between the conservation and tourism sectors. Together we recognise that Australia's great natural areas are important for conservation, public enjoyment and tourism. While there is strong common ground between these interests, there are some differences, and working together to promote common interests and understand and minimise difference is part of our effort.

Key elements of our partnership include extending, funding and maintaining our National Reserve System and ensuring we both play an informed and active role in helping to avoid dangerous climate change, in particular to our vulnerable natural icons such as the Great Barrier Reef.

Our National Parks and Protected Areas must be preserved to protect biodiversity and Australia's natural tourism attractions. We are pleased to have had an input into the development of this Action Plan and commend TTF Australia on the partnership approach to natural tourism and looking after our wonderful natural world.

**Don Henry | Executive Director  
Australian Conservation Foundation**



It is good to see the tourism industry recognising that National Parks and Protected Area of Australia are key assets of our nation. We all have a shared interest in their health and good management. Protecting these assets is an ongoing challenge which is deepening with the additional strains of climate change. Genuine partnerships between tourism and parks which aim at real benefits to conservation and enhanced visitor experiences could make a vital contribution.

**Penelope Figgis AO | Vice-Chair, Australia & NZ  
IUCN World Commission on Protected Areas**

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# Terminology

**Categories** mean the types of parks and protected areas under enabling legislation such as wilderness areas and national parks. Each category has distinct management objectives for which the area is reserved, such as conservation and tourism objectives.

**Conservation objective** means the broad range of management objectives to conserve the natural, cultural and heritage values of parks including: scientific research, preservation of bio-diversity and the protection of natural, cultural and heritage features.

**Director of Parks & Wildlife (Director)** means a State/Territory or Commonwealth statutory office holder under parks legislation with powers and responsibilities to manage parks.

**Environment Minister** means the State/Territory or Commonwealth Minister responsible for parks.

**Forests** mean areas reserved for managed forestry. Most forests do not meet the definition of protected areas but can have natural attractions suitable for natural tourism partnerships.

**IUCN (World Conservation Union)**, formerly the International Union for the Conservation of Nature, is a network of 82 States, 111 government agencies and over 800 non-governmental organisations. The IUCN has defined internationally accepted standards of protected area categories.

**Natural Tourism Partnerships (NTPs)** means partnerships between the private sector and government which enable tourism to contribute to park conservation and for park conservation to contribute to tourism.

**Parks** means protected areas and, more broadly, other crown land reserves managed for conservation and tourism objectives. Parks are geographically defined marine or terrestrial areas (such as a national park) which are managed under parks legislation by a director or park agency and where conservation and tourism can be managed. For the purposes of this report, parks do not include protected areas which are IUCN Category 1 or equivalent (e.g. wilderness areas) where a tourism objective is not applicable.

**Park agencies** means a corporation, trust, statutory authority, government agency or government department (typically at a branch or division level), such as Parks Victoria and the Great Barrier Reef Marine Park Authority, which manages a park or parks under enabling parks legislation.

**Park destination** means one or more parks and the nearby freehold land, forests and gateway towns in their surrounding region, which provide the natural tourism assets, attractions and infrastructure for the overall visitor experience.

**Parks legislation** means legislation which acquires and establishes parks and their categories and objectives. Parks legislation provides for the authority of the Director, Secretary, Environment Minister and park agency.

**Plans of Management (PoMs)** are legislative instruments implementing the conservation, tourism and other management objectives for an individual park. PoMs identify how natural and cultural features are to be conserved and specify what activities may or may not occur in the park.

**Protected Areas** are *“an area of land and/or sea especially dedicated to the protection and maintenance of biological diversity, and of natural and associated cultural resources, and managed through legal or other effective means”*, as defined by the (IUCN) World Conservation Union. Protected areas include most wilderness areas, national parks, state parks, etc as defined in park legislation.

**Secretary** means the head of the State/Territory or Commonwealth department responsible for parks.

**Tourism agencies** mean regional, territory, state, or national government tourism organisations such as the South Australian Tourism Commission and Tourism Australia.

**Tourism objective** means the park management objective of visitor tourism, recreation, appreciation, education and the economic and environmental contribution of visitors to the parks.

# 1: Introduction

Australia's national parks and protected areas are a principal attraction for domestic and international tourists. From Kakadu, the Great Barrier Reef, Sydney Harbour and South West Tasmania, to the Great Ocean Road, Kangaroo Island and Rottnest Island, Australia's parks and protected areas are defining tourism images, making them an invaluable asset for the nation.

Our parks' natural, cultural and heritage assets lack adequate funding and resources. Carefully managed and sustainable natural tourism in or near parks and protected areas is one solution to this funding problem.

Tourism is dependent on the quality of these natural areas. However, this quality is under threat from a lack of resources and capacity to effectively manage threats such as inappropriate fire, feral animals and weeds and the increasing additional stresses on natural systems posed by climate change.

Rather than undermining the quality of these natural areas through inappropriate development, industry must work to conserve the environment which is the primary attraction for visitors. Natural tourism can make a major contribution to environmental management.

Without the tourism industry, the cost of protecting and conserving parks falls wholly on taxpayers. Reliance on Government budget funding has proved inadequate to meeting the conservation needs of parks. A way must be found to harness the capacity of tourism to directly contribute to the conservation of these areas.

Conflicts between tourism and conservation in parks and protected areas have been the subject of contentious debate over many decades. However it is time to move on from this debate. The task of securing Australia's globally important biodiversity has never been more urgent. Our unique and ancient plants and animals face increasing threats. Australia's protected areas are the 'frontline' core lands of this national strategic priority. The task is large and needs many partners. Tourism is an obvious ally. Tourism has a vested interest in healthy ecosystems, thriving wildlife and well run parks with good information, friendly rangers and appropriate visitor infrastructure.

The tourism industry is now acknowledging the debt of gratitude owed to the conservation sector for protecting our natural, cultural and heritage assets; and is adopting sustainable natural tourism. Equally, park agencies and the conservation sector are beginning to embrace profitable and sustainable tourism to both fund and assist in the management of parks.

Natural tourism partnerships can deliver greater funding for conservation, innovative natural tourism products, and economic returns for regional communities and enrich the experiences and understanding of visitors to our parks.

## The Natural Tourism Partnerships Initiative

The Natural Tourism Partnerships Initiative (NTPI) is a major project managed by TTF Australia, with the objective of building stronger partnerships between private sector tourism operators and investors, park agencies, tourism agencies and the conservation sector.

The initiative was launched by the Minister for Small Business and Tourism, the Hon Fran Bailey MP in April 2006. It continues the work initiated by TTF Australia in 2004 in its landmark report: *A Natural Partnership: Making National Parks a Tourism Priority*.

The overall goal of the initiative is to develop public-private Natural Tourism Partnerships in our park destinations to:

- Improve funding, management and conservation outcomes for our natural areas.
- Develop new sustainable visitor experiences, services and natural tourism products.
- More effectively market and promote our parks and protected areas.
- Provide an economic contribution to regional areas and local communities.

## The Natural Tourism Partnerships Action Plan

This action plan, developed as part of the NTPI project, identifies the key issues and a way forward for natural tourism partnerships with parks.

This report aims to highlight the critical role the tourism industry and private partners can play in helping to ensure the future of our parks and the barriers to making these partnerships work effectively.

International examples show that those partnerships that are most successful are characterised by thorough planning, good communication, strong commitment from all parties and effective monitoring, regulation and enforcement by government.

Removing the barriers to partnerships and maximising their effectiveness requires action from industry, park agencies and a number of agencies, both in the tourism and environment sectors, and from Government at Federal, State and Regional levels.

This action plan advocates concrete proposals to progress Natural Tourism Partnerships by addressing the following key areas:



- Co-ordination between Federal, State and Local Governments.
- Regional park destination planning and management.
- Regulatory reform to enable investment in natural tourism.
- Policy reform for the development of parks visitor experiences and tourism product.
- Mechanisms to fund parks and conservation through tourism.
- Regional park destination branding and marketing.
- Comprehensive research on the contribution of tourism and parks to the economy.
- Impact of global warming on parks and natural tourism and adaptive strategies to meet these challenges.

Natural Tourism Partnerships offer a powerful policy tool for improving the economic sustainability of parks, enhancing the quality of services, efficiently leveraging investment in conservation and contributing to the core function of protecting biodiversity.

Importantly, improving the park visitor experiences and facilities through Natural Tourism Partnerships will also lead to greater dispersal of tourists to regional areas.



Thunderbolts Lookout,  
Barrington Tops  
National Park

*Photo:  
Hamilton Lund  
Courtesy Tourism  
New South Wales*

NTPs are complex, demanding and time-consuming but can offer significant benefits to government, the private sector and the public. With the correct regulatory framework and strong political commitment, both the future of Australia's tourism industry and our national parks can be greatly enhanced.

Demountable tent accommodation, Cape Conran Wilderness Retreat

Photo:  
Christian Pearson (Misheye)  
Courtesy of Parks Victoria



## 2: What are Natural Tourism Partnerships?

Natural Tourism Partnerships (NTPs) are partnerships between the public and private sectors which enable tourism to contribute to park conservation and for conservation of our natural assets to contribute to park tourism.

Essentially the private sector brings capital, expertise in visitor experiences and new revenue streams to park agencies. This enables park agencies to improve the delivery of their tourism objective and concentrate their expertise and funding on delivering conservation objectives.

Traditionally the public-private engagement in parks tourism has been a landlord-tenant relationship or licensor-licensee relationship. Limited in scope, these traditional relationships have often focused on managing tourism and conservation as competing objectives and assume the private sector and park agencies have competing interests.

Drawing on best practice in public-private partnerships, NTPs are an alternative model where partnership agreements provide risks and reward for both the park agency and the private sector to achieve the shared multiple objectives of both parties.

An NTP would provide incentives (and shared risks) for the private sector to achieve conservation outcomes, while providing incentives (and shared risks) for the park agency to achieve tourism and commercial objectives.

### 2.1 Scope of Natural Tourism Partnerships

Natural Tourism Partnerships between public and private sectors can deliver a wide range of tourism and conservation outcomes, including:

- **Conservation services** such as weed & pest control, bush regeneration and other land management.
- **Visitor experiences** such as guided walks, diving expeditions, glow worm night trails, wildlife safaris, caving, bird watching, boat trips, conservation volunteering, study tours and other innovative hospitality and natural tourism visitor experiences.
- **Accommodation experiences** such as tented safari camps, demountable cabins, huts, tree houses and eco-lodges; and adaptive re-use of existing buildings such as historic farm and mining structures, government stations and lighthouses.
- **Visitor management and services** such as marketing, visitor information, signage, interpretation, merchandising, cleaning, waste services, maintenance, parking and entrance gates.
- **Parks visitor infrastructure** such as power, water, sewerage, roads, trails, bridges, pontoons, car parks, visitor centres, visitor rides, canopy walks and zip lines, ski lifts, cable cars, scenic rail, walking tracks and lookouts.

Innovative NTPs could see private sector involvement in a wide range of conservation and tourism objectives for parks. A NTP agreement could involve the private sector delivering not only accommodation and visitor experiences, but services such as local track maintenance, signage and pest control for the park agency. This would bring a direct private sector contribution to the park and tap into the private sector's incentive, expertise and efficiency in delivering services at the destination.

#### Recommended Action



**Create Natural Tourism Partnerships between Federal and State/Territory Governments and the private sector to fund, develop and operate sustainable natural tourism visitor experiences and infrastructure which provide direct funding for park conservation and climate change adaptation.**

## 2.2 Natural Tourism Partnership Criteria and Assessment

Rather than a focus on the “highest bidder” and financial outcomes, Natural Tourism Partnerships should be designed and assessed using the “partnership criteria”.

NTPs should be assessed on a case by case basis as each proposal will operate in a unique conservation and visitor experience environment. The “partnership criteria” should be applied throughout the process of planning, expression of interests, commercial tenders, determining tenure, negotiations on commercial terms, final approval and ongoing management. The “partnership criteria” includes:

### 1. Shared triple bottom line objectives

NTPs must be designed to meet financial, environmental and social objectives. The objectives should be clearly defined, measured and attract shared risks and returns for all partners in the partnership agreement. For parks tourism these triple-bottom line objectives are:

#### Conservation

Environmentally sound tourism operations, that are compatible with park conservation objectives and plans of management, which contribute to conservation via revenue, visitor management or provision of direct conservation services to park agencies.

#### Visitor experiences

Innovative and internationally competitive visitor experiences (see Section 8) which attract a commercially viable tourism market; and educate and enthuse visitors as champions of conservation and parks.

#### Commercial viability

Provide revenue streams for park agencies, competitive ROI for investors and profitability for operators.

#### Regional social and economic contribution

Provide an economic contribution and employment opportunities to gateway towns, regional economies and indigenous communities at regional park destinations (see Case Study 1: Tourism and community partnerships)

### 2. Shared risks and returns

NTPs should provide shared incentives and penalties, risks and returns, for both partners against the shared triple bottom line objectives. Risks and returns can be in financial terms, in-kind provision of services or other incentives such as extended tenure.

Park agencies and the private sector can share risks and returns through an agreed share of net profit. The share of net profit can be varied depending on performance against environmental objectives. Similarly, incentives such as extended tenure can be granted on the basis of achieving conservation objectives.

### 3. Long term partnerships

NTPs require long term partnerships between park agencies and the private sector to achieve triplebottom line objectives. Conservation objectives in particular require a long term planning horizon and a long term interest in the land to build incentive to manage the environment for the future.

Equally, longer tenure periods for private operators on crown land are needed for commercial viability and returns to park agencies.

### 4. Build and Operate

NTPs should encompass the building, maintenance, refurbishment and operation of parks infrastructure, services and experiences; rather than separate contracts for works and service delivery. This will ensure that the design, building and maintenance will be undertaken with a long term interest in achieving the conservation and visitor experience objectives.

### 5. Reputable and capable partners

NTPs require private sector partners with eco-tourism accreditation, a positive track record on environmental issues, expertise in environment management and/or a significant brand investment in their environmental credentials. Equally, park agency partners need commercial expertise and capability.

### 6. Institution Frameworks and Knowledge Transfer

NTPs require a supportive legal, regulatory and institutional framework to succeed. Much of this action plan is designed to build a framework that support NTPs. In assessing and designing individual NTPs it is valid to consider whether the project has sufficient institutional support to succeed and whether undertaking the project will assist in the transfer of knowledge and experience to develop future partnerships.

## 2.3 Natural Tourism Partnership Agreements

Given the scope and criteria of NTPs, these partnerships need partnership agreements beyond the traditional legal approach of standard leases and licences. A partnership agreement should provide a legal mechanism for:

- A single legal approval for all permissions and grants required under legislation for all aspects of the building and/or operation of parks infrastructure and services.
- Flexibility to amend permissions and grants to respond to changes in the market and environment.
- Capacity to deliver incentives and penalties, risks and returns, against shared objectives - beyond the standard rents and fees.
- Terms which apply to the management of the entire park, not just the leased site or licenced activity.

Partnership agreements may be delivered through existing parks legislation by an innovative approach to current provisions on leases, licences, permits and commercial agreements. Alternatively, legislative amendments may be required to enable such agreements.

### Recommended Action



*Revise park regulation to enable Natural Tourism 'Partnership Agreements', with broader scope than current lease and licence arrangements and allow for partnerships which have shared tourism and conservation objectives and shared risks and returns on revenue and tenure.*

Sailing the Great Barrier Reef

Photo:  
Courtesy of  
Tourism Queensland



## 2.4 Natural Tourism Partnership Locations

The NTP approach is suited to forests, crown land reserves and freehold land in regional park destinations as well as marine and terrestrial parks and protected areas. Partnerships may be with park agencies, forest agencies or other government agencies responsible for land management. For example, the register of potential Natural Tourism Partnership opportunities identified in this action plan (see Appendix A3) contains opportunities on freehold land, reserved crown land, forests and adaptive re-use of previously modified park areas.

Suitable locations for new "hard" visitor infrastructure (such as visitor facilities) can be in parks or in land adjacent to parks. Freehold land, forests and crown land may have a less restrictive regulatory environment for tourism than parks, and may also be more palatable to the local community.

The location of proposed development of visitor infrastructure and experiences should be determined on a case by case basis using the partnership criteria. There should be no blanket "one-size-fits-all" support or prohibition on developing visitor infrastructure in parks (with the exception of IUCN Category 1 wilderness areas or scientific reserves). Proposed projects should be assessed for their capacity to:

- Be environmentally sustainable.
- Offer a commercially viable visitor experience.
- Deliver revenue, conservation and visitor management outcomes for the park.
- Deliver economic and social outcomes for the community.

Without limiting the case-by-case assessment and flexibility for innovation, applying the partnership criteria will most likely result in natural tourism development which is in previously modified areas, involves adaptive re-use of existing structures, uses tented or demountable structures or utilises low impact structures such as huts and eco-lodges.

### Recommended Action



*Refocus policy away from 'one size fits all' restrictions on allowable activities in parks and assess natural tourism projects on a case by case basis using the 'Partnership Criteria'.*



## Case Study 1:

### Tourism and community partnerships

#### **Brambuk-The National Park and Cultural Centre, Grampians National Park (Gariwerd), Victoria**

Gariwerd Enterprises (representing five Aboriginal communities\* of the Gariwerd area) and Parks Victoria are working together to manage and develop Brambuk – The National Park and Cultural Centre. The Brambuk precinct, located in Halls Gap, within the Grampians National Park (Gariwerd), is a living cultural centre showcasing aboriginal heritage, the national park and environmental values.

The Grampians National Park (Gariwerd) attracts over 1.5 million visits each year, and generates visitor expenditure of more than \$211 million per year in the region. The park is renowned for its breathtaking rocky views, rich Aboriginal culture, European heritage and stunning spring wildflower displays. The Park offers visitors a diverse range of adventure and recreational activities including short and long distance hiking, four wheel driving, rock climbing, canoeing, fishing and bird watching.

This symbolic project has developed a new cultural and environmental precinct and partnership which aims to 'establish Brambuk - The National Park and Cultural Centre as a pre-eminent site for the appreciation of Aboriginal culture and heritage and environmental values in Victoria.

Through extensive consultation between Parks Victoria and Gariwerd Enterprises the project received \$4.2M

in State and Commonwealth government support to enhance the visitor experience by developing a new entry building, Bush Food Café, forecourt area, gift shop, innovative information and interpretive displays. Better visitor facilities such as pathways, new car park and landscaping also add to the overall visitor experience and create an exciting cultural tourism destination in regional Victoria.

The long term partnership between Gariwerd Enterprises and Parks Victoria

- Helps to promote reconciliation between indigenous and non indigenous Victorians and improve the relationship between Aboriginal peoples, the Government and the wider community.
- Increases employment, training, educational and flow on business opportunities in the region including opening up Koori business and training opportunities.
- Creates a workable model for sustainable knowledge sharing with Australia's indigenous communities.
- Illustrates a good partnership approach, generator of investment and employment of local and indigenous people. There is potential to further develop the partnership and resultant benefits.

\*Gariwerd Enterprises represent the Kirrae Whurrong, Goolum Goolum, Gunditjmara, Winda Mara and the Framlingham people of the Western district and Wimmera region.

Source: Parks Victoria



## 3: Key Findings

TTF Australia consulted widely with the tourism industry, parks management agencies and private sector in the compilation of this report. Through forum discussions, one-on-one interviews and a review of current literature, policy and regulation, TTF Australia found a number of areas that require action.

### The key findings of the research are:

1. There is a lack of co-ordination between State and Federal Governments and tourism and conservation agencies in relation to tourism planning and marketing for parks. A 'whole-of-Government' approach is needed.
2. Natural tourism experiences and infrastructure in parks needs to be improved to meet future visitation needs.
3. Natural tourism consumers are seeking unique experiences rather than tourism products. The park visitor experience depends on the overall experience of both the park and surrounding destination.
4. Further research is required in the areas of the value and revenue potential of tourism in national parks; visitor needs; and supply and demand for tourism facilities.
5. There are 7,700 parks and protected areas in Australia, most with their own plan of management. This poses significant problems for natural tourism branding, planning and marketing. Targeted regional park destinations (which could include several parks in a destination) need to be prioritised.
6. There are over 50 different categories of parks across Australia. Tourism and recreation is narrowly and inconsistently defined as a management objective for parks. The internationally accepted IUCN category system treats tourism as a primary management objective in appropriate categories.
7. Park agencies lack sufficient funding for increasing conservation, climate change adaptation and visitor management costs; and lack resources for tourism branding, planning, development and marketing.
8. Private sector investors are interested in investing in and operating park infrastructure, visitor experiences and conservation services through (NTPs).
9. Assessment and approval processes for NTPs can involve every level of government and multiple agencies and branches within each level of government. The processes can be a major barrier to NTPs through time delays and changing approval requirements.
10. Some park systems prohibit private sector involvement in parks and some systems have restrictions on leases and licences that create a barrier to effective private sector investment in parks.
11. Current lease and licensing regimes in parks encourages landlord-tenant relationships, rather than risk and revenue sharing partnerships between park agencies and the private sector.
12. Visitor entrance and usage fees provide a valid source of revenue for conservation in most park systems and can provide a visitor management tool.
13. Tourism and recreational use of parks through NTPs can make a direct contribution to conservation and climate change adaptation in those park systems that provide for full hypothecation of revenue.
14. More effective marketing strategies are needed to market park tourism visitor experiences, build tourism revenue for parks and manage visitation.

## 4. Methodology

Underpinning this action plan is qualitative research into the opportunities and barriers for Natural Tourism Partnerships. As part of this research, TTF Australia undertook extensive consultation with State and Federal Governments; tourism and parks agencies; the investment community; and representatives of conservation organisations.

The consultation process and research methodology involved:

- Two high level Natural Tourism Partnerships Forums with senior representatives from Federal, State and Local Government, government agencies in the tourism and environment sectors and tourism investors and operators.
- A Literature Review of current Australian and international publications and government policies on tourism in national parks and protected areas.
- An Investor Survey and in-depth one-on-one interviews with members of the investment community and further consultation with parks and tourism agencies.
- A Regulatory Review of Commonwealth, State and Territory systems and regulation.

### Natural Tourism Partnerships Forums

TTF Australia conducted two forums which brought together a range of stakeholders from the tourism industry, the investment community, Australian, State and Territory tourism and environment government representatives and conservation groups with an interest in tourism in protected areas.

The forums allowed for open discussion and interaction between key decision makers leading to a greater understanding of the opportunities, barriers and innovative proposals for NTPs. The forums were held in April 2006 in

Melbourne and November 2006 in Brisbane. Full reports on the content and outcomes of these forums were prepared and distributed to participants. A list of the organisations represented at these forums can be found in Appendix A2.

### Literature Review

A review of recent academic papers, journal articles, government submissions, State and Territory tourism plans, case studies and other literature relevant to tourism investment in protected areas was conducted to inform the research and action plan.

This review found that while there is a lot of information published about tourism in national parks and protected areas per se, the amount of published work related to the views of the investment community about their propensity to invest in parks was minimal. Relevant references have been cited throughout the text of this report and a full list of references can be found in Appendix A1.

### Investor Survey

A qualitative survey and in-depth interviews were conducted with thirteen major tourism investors and their advisors who have experience and interest in developing natural tourism experiences at park destinations. The list of investors surveyed can be found in Appendix A2.

### Regulatory Review

A comparative review and analysis of Commonwealth, State and Territory park legislation, regulations, policies and management was undertaken to identify barriers to NTPs. The initial review was further developed by consultation with park agencies. Specific case studies of the Commonwealth, New South Wales, Victorian and Queensland park systems can be found in Appendix A3.



Cradle Mountain  
Lodge

*Photo:  
Courtesy of Voyages  
Hotels & Resorts*

## 5. International and Australian Context

### 5.1. The International Context

Around the world, support and funding for protected areas is declining. While global spending on protected areas amounts to around US\$6.5 billion a year,<sup>1</sup> the World Bank estimates that the amount required to fully support these areas and their conservation outcomes is between US\$12 billion and US\$45 billion per year.<sup>2</sup>

Over the past decade many governments have cut their budgets for protected areas by more than half. Protected areas in developing countries receive on average less than 30 percent of the funding estimated to be needed for basic conservation management.

Many national parks in developing countries lack the necessary funds to pay for staff salaries, patrol vehicles, or wildlife conservation programs. Insufficiently protected, these parks are vulnerable to poaching, deforestation, and agricultural use by local communities.

According to the World Bank, the creation of new protected areas has outpaced governments' ability to provide adequate financial resources. Some park agencies have developed autonomous models that allow a more businesslike management approach and greater financial independence and some governments have entered into public-private partnerships.

According to the United Nations World Tourism Organisation (UNWTO), worldwide, public-private partnerships in tourism are on the rise.<sup>3</sup> Increasingly, countries are looking to the private sector to help fund these areas and ensure they are maintained to support important conservation and environmental outcomes.

*A report by the World Wildlife Fund states: "Protected area agencies can supplement their budgets by operating concessions such as lodges, restaurants, and gift shops within protected area boundaries. Royalties and fees generated from these concessions provide a predictable revenue stream to support the agencies' long-term activities. Concessions can be run directly by the protected area agency or leased to a private company. However, in many cases employees of protected areas lack the skills necessary to operate a commercial business. In such cases, it may be preferable to transfer business operations to private enterprise(s)".<sup>4</sup>*

Commercially oriented park agencies have diversified their funding sources and lessened their reliance on tax revenue from government. These agencies have developed alternative revenue sources as visitor use fees, endowment

funds, for-profit investments, tradable development rights, commercial operations in protected areas, carbon banking and voluntary contributions.

Internationally, public-private partnerships in parks have extended beyond commercial tourism to include private sector delivery of conservation services.

"Some park agencies realized that they lacked the institutional and financial resources to undertake biodiversity management themselves. For this reason some have chosen to enter into long-term concession contracts with private partners, delegating conservation and biodiversity management activities as well as the rights for commercial use of parkland."<sup>5</sup>

#### Recommended Action



***Release park agency resources for conservation by utilising the private sector to deliver park visitor management and conservation services through Natural Tourism Partnerships.***

Carefully managed tourism activity can contribute greatly to supporting the financial needs of parks through a variety of mechanisms such as park entry fees and visitor levies. Funding from tourism enables parks management agencies to maintain critical park infrastructure such as walking tracks, roadways, signage and amenities as well as establishing effective programs to protect or enhance conservation efforts.

UNWTO's Tourism 2020 Vision forecasts that international arrivals are expected to reach 1.6 billion by the year 2020, growing at a rate of 4.1 per cent annually<sup>6</sup>. The International Ecotourism Society has indicated that nature tourism may account for as much as 40-60 percent of all international tourism.<sup>7</sup>

These numbers show the potential of natural-based tourism as a revenue source for environmental conservation. However, in order to tap into this market a certain level of tourism infrastructure and services must be in place.

#### Recommended Action



***Provide separate dedicated Park Agency budget funding for visitor management and visitor infrastructure which matches increases in park visitation.***

### Emerging issues and trends

Both the IUCN<sup>8</sup> and the World Commission on Protected Areas<sup>9</sup> have outlined a number of emerging trends and issues related to planning and management of tourism in protected areas.

In summary these relate to the growth of international travel and proliferation of options; growing demand for nature-based tourism; decreases in leisure time among white-collar workers, counterbalanced by increases in leisure time due to earlier retirement and longer life spans of an ageing population; advances in global communications and information technology; and increasing social and environmental concerns by consumers.

*“Long-haul air travel has revolutionised global park visitation, with people seeking out World Heritage Sites, national parks and other protected areas. Indeed, the very existence of a protected area, particularly of a national park, is often a lure for tourists. This trend will continue and in general protected area managers should prepare for more visitors from around the globe. While they will present a challenge in terms of language, culture or knowledge and preconceptions of the protected area, they also represent a good source of income, employment, and a means to convey cultural and ecological values to a wider world.” - World Commission on Protected Areas.*

### Consumer trends in nature-based tourism

A report by the World Council on Protected Areas states that individuals are staying healthier longer, and maintaining, or even extending their interest in outdoor activities, such as walking, nature study, and wildlife observation. A reduced demand for camping has been offset by a greater demand for more comfortable lodge accommodation.

The report states that tourists are increasingly demanding high quality recreational opportunities and the services that support them. Those who receive quality service during their normal working week expect to be offered this by their leisure providers as well. They expect guides to be knowledgeable and good communicators. They want their hosts to make them feel welcome, comfortable and part of the communities they visit.

### Tourism and conservation

World-wide there is a growing demand for tourism activities that contribute to conservation outcomes. This has led to a rise in different types of tourism such as conservation volunteer programs, responsible holiday options and authentic natural or indigenous experiences that are unique to a destination.

## Case Study 2:

### Commercial operations in protected areas in New Zealand

The New Zealand Department of Conservation (DOC) leases more than 3,500 concessions on public conservation land to private companies.

Concession contracts are issued for commercial activities such as tourist guides, restaurants, shops, lodges, agriculture, horticulture, telecommunications ventures and filming.

To determine the fees, the DOC uses a formula that represents a revenue-sharing scheme based on the proportion of investment contributed by the leasing business (investing capital) and the DOC (investing land).

The formula is directly connected to the income of the concessionaire and can be set as: a percentage of gross income, an amount per hectare, head, or trip, a fixed payment, or a combination of the three. For example, guided tour concession fees are set at 7.5 percent of gross income, helicopter landing rights command five percent gross income, and hotels or ski areas collect 3-5 percent of gross income.

The DOC also operates more than 1,000 back-country huts and 250 campsites. To use a hut, visitors are required to pay for a permit at a local DOC office; campsite fees are generally collected on-site. Usage fees for huts and campsites are divided into categories based on the level and quality of the facilities offered. Top-end, highly trafficked huts can cost NZ\$35 (\$22) per person per night (ppn), while campsites and other huts range between NZ\$3-\$15 (\$2.70-\$13.40) ppn.

Fees set for huts within New Zealand's famous “Great Walk” network recover operating costs entirely from users. Other huts and campsites require additional taxpayer subsidy.

Source: Koteen S, 2004 'Financing Species Conservation: A Menu of Options', World Wildlife Fund Centre for Conservation Finance.

## Case Study 3:

### Tourism partnerships benefit conservation in South Africa

South African National Parks (SANParks) was created in 1998 from the transformation of the National Parks Board. SANParks became a successful autonomous entity and a leader in the development of the ecotourism industry with high research standards. Yet despite managing some of the world's most spectacular natural assets, SANParks was failing to deliver tourism products efficiently. Service standards were often mediocre, products were poorly differentiated, and prices were not determined by the market.

In 1999, following a benchmarking exercise against similar, private operations, SANParks realised that it lacked the skills, incentives, and access to capital that it needed to make the most of tourism opportunities. Deciding that it would not run commercial ventures, but instead focus on its core function of biodiversity management, SANParks developed the concept of "commercialisation as a conservation strategy."

Part of this strategy was the concession of exclusive rights to commercial use of lodge sites together with the surrounding parkland. Since starting to implement the strategy, SANParks has concessioned 12 lodges, 19 shops, 17 restaurants, and 4 picnic sites to private partners.

The 20-year concession contracts for lodges (with no right of renewal or first refusal on expiration) include

environmental and social obligations and penalties for non-compliance.

The concessionaires pay SANParks an annual fee calculated as a percentage of the turnover bid during the tender process.

SANParks is now independent from government funding for more than 75 percent of its operating revenue. This is a significant financial achievement, even compared with conservation agencies in more developed industrial countries.

The commercialisation strategy has vastly improved SANParks' standing in the eyes of stakeholders, reduced unemployment in neighbouring communities, and created economic opportunities for previously disadvantaged ethnic groups.

As a result of this success, the national government increasingly views national parks as a tool for economic development and has stepped up its annual financial commitment to SANParks. Thanks to the increase in public funds and the additional revenue from its partnerships, SANParks has been able to expand the land under its protection by 5 percent in the past 10 years.

Source: Private Sector Development Vice Presidency, 'Public Policy for the Private Sector: Managing National Parks: How Public-Private Partnerships Can Aid Conservation', The World Bank Group, June 2006, Note No. 309.



*"Tourism based on protected areas can be a key factor in supporting the conservation of the natural and cultural heritage. It can generate the funds through entrance and service fees, local taxes and in many other ways that can be used directly to help meet or offset the costs of conservation, maintaining cultural traditions and providing education. Indirectly, by demonstrating the economic value that protected area tourism can bring to a country or a region, it can build public and political support for conservation of natural heritage." - World Council on Protected Areas.*

## 5.2 The Australian context

### Australian Parks and Protected Areas

Australia has nine separate park and protected area systems – one from each State and Territory and a Commonwealth system. Some of the park systems predate Federation and the Australian Constitution has no provision for a national approach to conservation and land management. Parks are predominantly a State Government concern and the park regulatory systems can differ from State to State.

*"The park system thus, like railway gauges, is a system that reflects the distinctive historical, social and political make up of the jurisdiction in question. These differences work their way into the different approaches to issues of interest to tourism."* – Senior Park Agency Manager

Across the nine park systems, Australia has over 50 different categories of protected area crown reserves. These categories cover at least 7,720 different protected areas (including over 550 National parks) which make up 10.5% of Australia's land mass. This does not include the extensive number of marine parks. The park systems are treated together as a National Reserve System whose directions are broadly agreed between the Federal, State and Territory jurisdictions<sup>10</sup>.

Park management occurs in complex legislative, regulatory, planning and approval systems which are a by-product of the crucial conservation objectives of parks. It should not be forgotten that conservation regulation preserves the parks natural and cultural values for visitors.

The complexity of the regulatory systems, and number of park categories, poses a barrier to private sector understanding and involvement in parks. The large number of parks (and the fact that park boundaries were naturally not determined for tourism purposes) poses a particular problem in marketing parks to visitors.

### Recommended Action



***Target priority regional park destinations, as agreed by Park Agencies and Tourism Agencies, which meet the 'National Landscapes' criteria of providing a unique attraction and visitor experience.***

Additionally, much of the overall park visitor experience occurs outside the park on adjacent land and in gateway towns. Consequently most tourism investors and park managers are interested in branding, planning, developing and marketing the park visitor experience for targeted regional park destinations rather than a multitude of individual parks.

### Funding Australia's Parks

Additional estate is being steadily acquired for our park systems, creating an increased need for funding to manage park conservation objectives. Park agencies also report funding difficulties in developing and maintaining essential park visitor infrastructure and services – to both meet the park tourism objective and manage the visitor impact.

*"Submissions noted that problems of inadequate budgets and staffing numbers have been exacerbated by the rapid growth in protected areas in a context of static, or even declining, staffing and budget levels."*<sup>11</sup>

*"Most Australian park agencies have insufficient funds to adequately carry out both natural resource management and visitor infrastructure management simultaneously. The cost of managing and maintaining Australian Protected Areas and providing for visitors have increased significantly over recent years with increased land area... and increases in visitation."*<sup>12</sup>

### Recommended Actions



***Increase budget funding to Park Agencies for land acquisition, climate change adaptation and ongoing conservation of the increasing park estate.***

***Provide separate dedicated Park Agency budget funding for visitor management and visitor infrastructure which matches increases in park visitation.***

Direct government budget funding is the primary source of revenue for parks. The main secondary source of funding from parks comes from tourism visitor use fees.

Most park visitors are independent visitors and the most common visitor use fees are vehicle entrance fees to parks, typically around \$10-15 per day. This is a small proportion of expenditure by visitor. Most visitors primarily spend on hospitality, retail and accommodation outside the park.

Commercial tourism operators are generally charged an application fee (approximately \$300), annual fee (approximately \$150-\$250) and per capita fees (usually the same as independent visitors i.e. \$10-15 per day) for a simple licence to operate a commercial activity in a park such as a tour bus.

Park visitor fees are kept low by governments for equity considerations and in some park systems, such as Queensland and the Northern Territory, entrance fees are not charged at all.

## Recommended Action

***Apply park visitor entrance, parking, camping and usage fees in all park systems.***

It would take significant increases in visitation to reap a major increase in funding from entrance fees alone. Alternatively, the private sector can provide the capital and expertise to deliver infrastructure and the value-added visitor experiences which consumers are demanding and are prepared to pay for. These private sector value-added services can also capture a greater share of current visitor expenditure which is largely spent off-park. Provided these private sector experiences are delivered through Natural Tourism Partnerships, they should provide a shared return to park agencies and parks.

Visitor experiences,  
Sounds of Firelight,  
Kings Canyon Resort

Photo:  
Courtesy of Voyages  
Hotels & Resorts



## Recommended Action

***Create Natural Tourism Partnerships between Federal and State/Territory Governments and the private sector to fund, develop and operate sustainable natural tourism visitor experiences and infrastructure which provide direct funding for park conservation and climate change adaptation.***

## Consumer demand for parks tourism

In 2006 there were 5.15 million international visitors to Australia. Of these international visitors 66% participated in a nature based tourism activity during their stay. During 2006 approximately 2.4 million international tourists visited a national/state park during their stay, an increase of 3.2% on 2005. These international park visitors spent approximately \$7.7 billion during their travels in Australia<sup>13</sup>. In the domestic market there were 10.5 million visitors to a national/state park, these domestic park visitors spent approximately \$6 billion in their travels within Australia<sup>14</sup>.

Currently the top five source markets for international park visitors are the United Kingdom, Japan, Europe, New Zealand and the United States of America. The Asian market places a high importance on the natural experience and visitors from Japan, Korea and China have a high propensity to visit parks. With rapid growth in visitor numbers from Asia, a rapid growth in park visitation from this market can be anticipated. The research shows that international park visitors to Australia:

- Have a high propensity to eat at cafes and restaurants.
- Tend to also shop for pleasure as part of their visitor experience.
- Tend to stay in longer in Australia.
- Are often aged over 35 years and tend to travel as a couple.
- Spend more on an average trip to Australia compared to non-park visitors.

International park visitors are clearly a higher yield tourism market, however the greatest source of tourism to parks and protected areas comes from the domestic market. Including all parks and other protected areas, domestic visitors represent nearly 90% of the 80 million total visits to protected areas annually (including day trips)<sup>15</sup>. Given these statistics, the value of international and domestic tourism as a potential ongoing funding source for parks is clearly evident.

## Senate Inquiry into Parks

The Australian Government launched the findings of a Senate Inquiry into the funding and resourcing of Australia's national parks, conservation reserves and marine protected areas in April 2007<sup>16</sup>. A number of the findings and recommendations made in this report support the principles outlined in this action plan.

These relate to the need for a landscape based approach to nature conservation, good interagency and inter-jurisdictional co-ordination and adequate planning, management and resources for the management of parks. The report also acknowledged the economic contribution of tourism to the conservation estate. The specific recommendations that refer to tourism and have relevance for Natural Tourism Partnerships include:

**Recommendation 6:** The Commonwealth, States and Territories boost the resilience of reserves against the effects of climate change by focusing on increasing their connectivity, so they contain a continuum of different climatic zones, altitudes and ecosystem types.

**Recommendation 8:** The committee recommends that best-practice preparation and revision of reserve management plans should ensure that stakeholders are consulted at the commencement of planning processes, rather than beginning with seeking comment on draft plans.

**Recommendation 10:** The Commonwealth Government examine ways to encourage State and Territory Governments and their relevant agencies to engage more fully in programs that provide opportunities for recreational groups and users to contribute in a positive way to the conservation and maintenance of park resources.

**Recommendation 14:** All states and territories publish comprehensive information in a nationally consistent form on funding levels for ongoing management of national parks and reserves, including staffing resources, and that this information be published annually in the relevant annual reports.

**Recommendation 15:** All states and territories, at a minimum, maintain their budgets for national parks and reserves in real terms to meet expansions in the reserve estate and operational requirements.

These recommendations are further informed and supported by TTF Australia's research and this action plan.

## National Tourism Investment Strategy

In 2005, the Australian Government appointed a National Tourism Investment Strategy Consultative Group to report on issues and make recommendations to address



Jetty  
The Great Barrier Reef

Photo:  
Courtesy of Tourism  
Queensland

impediments to private sector investment in key areas of tourism.<sup>17</sup>

The report made a number of recommendations in relation to tourism development in national parks. These recommendations included:

**Recommendation 28:** The Australian and State Governments, via the Tourism Minister's Council meetings and state national parks and wildlife agencies, to continue focusing on streamlining the approval process of niche market development in national parks.

**Recommendation 29:** The Australian Government to implement longer land tenure terms with a minimum tenure length of 50 years and an optimal length of 99 years to address concerns regarding short tenure terms and the impact they have on investment decisions.

**Recommendation 30 (a):** The Australian Government to address deficiencies in park management structures by undertaking a valuation of major national parks to identify their ecological value and tourism potential to inform funding decisions. Areas with higher value will require greater management. An understanding of the value of parks will provide an indication of the revenue potential of the park and its ability to self-fund management.

**Recommendation 30 (b):** The Australian Government to develop park management structures, which reflect the dual role of parks as conservation areas and tourist attractions. A management structure with dedicated resourcing to tourism industry development and liaison will provide a system to evaluate and facilitate private sector investment in facilities such as parking and amenities.

**Recommendation 31 (a):** The Australian Government to develop pro forma lease or operating agreements which can be used by native title holders for private sector development on, or access to, native title land, recognising both the cultural and environmental heritage of the site and to improve the approvals process. This would streamline

the process and provide native title holders and operators with a basis for negotiation.

**Recommendation 31 (b):** The Australian Government to encourage Land Councils to accelerate the process to action the backlog of native title claims.

An interdepartmental committee, chaired by the Department of Industry Tourism and Resources and involving all relevant agencies provided advice and a response to the recommendations<sup>18</sup>. These recommendations are further informed and supported by TTF Australia's research and this action plan.

### **Australian Government National Landscapes Initiative**

The Australian Government launched the National Landscapes Initiative in 2006. The aim of the project is to develop a co-ordinated approach between Parks Australia and Tourism Australia, to identify opportunities for branding, master planning and marketing of significant national tourism regional destinations (or landscapes). National Landscapes include natural tourism and park destinations, but focus on the total experience to be offered by a region rather than simply a collection of specific destinations (see Case Study 8: National Landscapes).

The National Landscape project is at an early stage and only a few landscapes have been identified, such as Kakadu and The Red Centre, which are primarily in Commonwealth park areas (see Case Study 7: Brand Kakadu). To evolve as a 'national' approach to destination branding and marketing, a series of landscapes will need to be identified (across States and Territories) which can be marketed internationally.

Currently State and Territory tourism agencies and park agencies are not represented on the National Landscapes Reference Committee which identifies prospective landscapes, and some state agencies have raised concerns regarding multiple branding of the same regions through National Landscapes and existing brands such as World Heritage listing and State level branding.

National Landscapes promises a co-ordinated approach to destination branding, developing and marketing of unique park destination visitor experiences. With formal input and involvement of State agencies, National Landscapes should provide an effective mechanism for the promotion of tourism and conservation objectives in national parks.

## **Recommended Actions**



*Target priority regional park destinations, as agreed by Park Agencies and Tourism Agencies, which meet the 'National Landscapes' criteria of providing a unique attraction and visitor experience.*

*Fund and develop branding strategies for park destinations using the 'National Landscapes' initiative.*

*Using the 'National Landscapes' initiative, fund and develop regional park destination master plans for sustainable natural tourism visitor infrastructure and experiences, based on the brand strategy.*

### **State and Territory Natural Tourism Initiatives**

In addition to these Federal reviews and initiatives, State and Territory park and tourism agencies are currently developing or implementing a range of nature-based tourism strategies, plans and policy initiatives involving parks tourism. These strategies include:

- New South Wales' *Living Parks - A sustainable visitation strategy for NSW national parks and Nature in Tourism: A Plan for New South Wales 2004-2007* under the *Towards 2020: New South Wales Tourism Masterplan*.
- Victoria's recently released *Nature Based Tourism Strategy 2007-2011*.
- Queensland *Tourism in Protected Areas Initiative* under the 10-year *Queensland Tourism Strategy* (see Case Study 4: Tourism in Protected Areas Initiative).
- Western Australian Government's Landbank Initiative (see Case Study 6: Landbank).
- South Australia's *Visitor Management Strategy*, currently under development.

These strategies have been developed by both tourism and environment ministries and agencies in each State. Many park agencies are also currently undertaking, or have recently completed, a review of their licensing systems for commercial tourism operators.





## Case Study 4:

### Tourism in Protected Areas Initiative (TIPA)

#### A Queensland partnership between tourism and conservation

The Queensland Parks and Wildlife Service (QPWS) manages more than 11 million hectares of public lands across the state. Many QPWS managed areas have significant natural, cultural and recreational values that are a key resource for the State's nature-based tourism industry. QPWS estimates that tourism and recreation in Queensland's protected areas attracts over 16 million visits a year.

The Tourism in Protected Areas (TIPA) initiative is a framework aimed at providing a more efficient, effective and equitable system of tourism management in protected areas. In particular, the initiative was designed to forge a participatory relationship between QPWS and tourism operators.

TIPA was developed in response to concerns raised by tourism operators regarding access to Queensland's protected area network. A forum between all stakeholders identified 18 key issues that were standing in the way of developing partnerships between tourism and conservation.

The issues covered a wide range of topics such as accreditation, intellectual property rights, pioneering operators, permit periods, visitor capacity, communication between industry, traditional owners and communities, unused and illegal trading of operator permits, private sector investment in parks and compliance and enforcement of regulations.

A working group of industry and government representatives was formed to make recommendations to the Queensland government on how these topics could be addressed.

The result of the working group's deliberations was the report, *Tourism Management in Queensland's Protected Areas: A new way forward in managing tourism*. It proposed seven key recommendations that dealt with 16 of the 18 issues. The report did not deal with the issues of user pays and private investment in parks because at the time these were outside government policy and are still to be addressed.

TIPA is now being implemented progressively across Queensland's protected area network for certain activities at high-use and high-value premium visitor sites. Initially six key tourism districts have been selected at which TIPA will apply. In the near future, the Sustainable Visitor Capacity (SVC) of these sites will be determined with advice from working groups.

Once the SVC is decided, operators will be invited to enter into agreements with QPWS. Legislative provisions for TIPA are contained in the Marine Parks Regulation 2006, the Nature Conservation (Administration) Regulations 2006 and the Recreation Areas Management Act 2006.

#### Benefits of TIPA

Implementation of the TIPA framework provides benefits to the environment, parks agency management and the tourism industry. These include:

- Better protection of key visitor sites through determining visitor capacity.
- Greater business certainty associated with longer permit tenure for commercial operators under commercial activity agreements.



## Case Study 4 continued:

- The introduction of capacity based pricing, capacity trading and subcontracting amongst tour operators.
- The introduction of performance standards, accreditation systems and codes of practice.
- Allocations for new capacity through expressions of interest.

### Partnership Arrangements

QPWS, with support from Tourism Queensland, and the Queensland Tourism Industry Council is implementing the TIPA framework. During implementation, there will be opportunities for all stakeholders with an interest in Queensland's parks to be involved in TIPA initiatives.

This collaborative process ensures that the interests of the local community, recreation and scientific interests and the tourism industry are represented. The lessons of involvement and process where the industry's problems were clearly identified and a process put in place to address those problems, shows that planning, time and a willingness to form a partnership approach can yield a successful outcome.

As a result of the TIPA initiative there will be: more acceptable impacts, better management and input into the type of facilities that are needed, planned change to fix any undesirable aspects, more realistic expectations in terms of approvals, enhanced visitor experiences and greater certainty for operators.

Fraser Island in Great Sandy National Park is one of the first sites where TIPA will be applied. The model is also being applied to Queensland's whale-watching industry in Hervey Bay on a new sustainable management framework that will give operators greater freedom to innovate and develop and operate new vessels which enhance the visitor experience while adhering to sound environmental guidelines.

By moving away from a traditional regulator versus operator approach, to a collaborative one, the Queensland Government has been able to break down barriers between tourism and conservation management agencies, and create a true long-term business partnership.

The TIPA initiative demonstrates the importance of developing relationships between the key players and the need for cultural changes on both sides to make parks more open to tourism and the tourism industry more sensitive to parks management issues and sustainability of their industry.

### Environment Protection and Heritage Council

The Australian Government Environment Protection and Heritage Council (EPHC) is comprised of Environment Ministers from all States and Territories, as well as the Australian, New Zealand and Papua New Guinea governments with representation from the Australian Local Government Association. It aims to ensure that governments work together with communities to achieve and enhance a healthy natural and cultural environment in harmony with social and economic goals.

The National Tourism and Heritage Taskforce of the EPHC developed a strategy and action plan for developing natural and cultural heritage tourism in Australia<sup>19</sup>. The taskforce is continuing to refine a set of key opportunities arising from this plan.

The EPHC Strategic Plan for 2006-2008 includes a proposal to develop an integrated national heritage policy to ensure that Australia's historic natural and indigenous heritage is recognised and sustained seamlessly across national, state and territory, and local systems. The policy will be developed cooperatively by both Commonwealth and State/Territory governments.

The EPHC is also working to increase cooperation between governments on heritage matters, including reviewing world heritage governance arrangements and working with the Natural Resource Management Ministerial Council on national approaches to protected area management.

In November 2006, the EPHC agreed to review World Heritage governance arrangements to ensure that Australia maintained best-practice in conserving its World Heritage areas. This review covers advisory committee arrangements and management planning and funding principles for World Heritage places on the basis of no reduction in funding for each State and Territory. On 13 May 2007 the Council of Australian Government (COAG) agreed to the review of World Heritage governance arrangements. This will reduce the number of World Heritage area specific Ministerial Councils, whose functions will be absorbed by the EPHC.

### Other Ministerial Councils

There is currently a Tourism Ministers Council (TMC), Environmental Protection and Heritage Council (EPHC) and Natural Resource Management Ministerial Council, however none of these councils appear to specifically address the issues of tourism across all national parks and protected areas.

A range of Ministerial forums have been convened that relate to tourism issues in national parks and protected

areas in specific jurisdictions. These include the Great Barrier Reef Ministerial Council and the Wet Tropics Ministerial Council which co-ordinate policy and funding between the Australian and Queensland Governments. The Northern Territory World Heritage Ministerial Council co-ordinates policy between the Northern Territory and Australian Governments on matters relating to Northern Territory World Heritage properties.

### A Whole-Of-Government Approach

TTF Australia's research highlighted that managing tourism across Australia's national parks and protected areas needs a more co-ordinated approach at the policy and decision making level. A whole-of-government approach is needed across the Federal, State and Local levels.

At this time there is no national forum of Tourism and Environment Ministers from the Commonwealth, States and Territories to drive a co-ordinated approach to tourism and parks. A Ministerial forum is needed to progress the following initiatives as they relate to parks tourism:

- This Natural Tourism Partnerships Action Plan.
- The National Tourism Investment Strategy.
- The National Landscapes initiative.
- The EPHC National Tourism and Heritage Taskforce Strategy.
- The recommendations of the Senate Inquiry.

### Recommended Action

***Convene a special meeting of Tourism & Environment Ministers to consider and progress this Natural Tourism Partnerships Action Plan and co-ordinate natural tourism policy initiatives.***

### A Tourism and Environment Advisory Group

Below the Ministerial level a national tourism and environment advisory group is needed to progress natural tourism. An advisory group should comprise senior representatives of the Australian, State and Territory governments from both the tourism and environment sectors, parks and tourism agencies and national conservation and industry groups to advise the Ministerial forum.

This group could be convened through the current Australian Standing Committee on Tourism (ASCOT) or the Heads of Parks and Tourism Agencies (HOPTA) committee. Advisors from both the conservation sector and the private sector should be invited to join the group.

### Recommended Action

***Implement a Natural Tourism Advisory Group of senior representatives from park agencies, tourism agencies, conservation groups and tourism industry groups to advise Tourism & Environment Ministers on the strategic direction of this Natural Tourism Partnerships Action Plan.***

A Tourism and Environment Advisory Group could be asked to determine an agreed priority list of park based tourism region destinations using the National Landscapes initiative.

### Recommended Action

***Target priority regional park destinations, as agreed by park agencies and tourism agencies, which meet the 'National Landscapes' criteria of providing a unique attraction and visitor experience.***

### Ongoing Natural Tourism Partnerships Forums

In order to progress the agenda of parks tourism, it is recommended that ongoing national forums are convened with key government, industry and conservation leaders by TTF Australia. These forums should aim to:

- Explore a greater range of partnership models and develop sample partnership agreements.
- Formulate an agreed set of principles to guide the promotion and marketing of targeted National Landscape regional park destinations.
- Develop best practice in State and Territory nature-based tourism plans and strategies and approaches to developing NTPs.
- Promote innovative visitor experiences in parks.
- Make recommendations on the most appropriate methods for marketing these destinations and experiences, including media strategies, marketing collateral, and online strategies and develop a nationally co-ordinated marketing plan.
- Identify NTP opportunities for cooperative industry, government and community tourism initiatives that result in conservation outcomes e.g. tourism volunteer monitoring or park maintenance programs.

## 6. The Investment Environment

In-depth interviews with representatives of the investment community, the Natural Tourism Partnership Forums and the literature review provided valuable insights on the environment for potential investors in park tourism.

This research was undertaken to assess the viability of natural tourism investment in parks, investor commitment to sustainable tourism, barriers to investment and proposals to improve the investment environment.

### 6.1 Propensity to Invest in Parks

Overall, the investment community believes that the international and domestic market demand exists for viable natural tourism in parks. The investment community consistently raised the same criteria and issues in making these investment decisions. These were:

- Market demand for the visitor experience.
- Distance from major gateways.
- Environmental and social sustainability.
- Transport access and park visitor infrastructure.
- Cost of planning and approval, native title and ongoing environmental compliance.
- Security, certainty and tenure for the return on investment.

Industry remains interested in operating and investing in new tourism product in parks. However most of the investors mentioned a previous poor experience in park investment and this had sharpened their criteria for future investment.

Visitor infrastructure,  
Remarkable Rocks,  
Flinders Chase National  
Park, Kangaroo Island

Photo:  
Adam Bruzzone  
Courtesy of South Australian  
Tourism Commission



### Market Demand

Investors believe there is sufficient market demand for natural tourism products and experiences to invest in Natural Tourism Partnerships that would provide a commercially viable return on investment and an economic contribution to parks.

However the consumer market is changing and natural tourism products need to be more experiential and have unique offerings. Consumers also expect sustainable natural tourism products. In assessing investment in parks, investors will consider:

- Uniqueness and quality of the visitor experiences offered.
- Sustainability of the visitor experience.
- Appeal of the park's natural tourism attractions and the regional park destinations.
- Capacity to effectively market the natural tourism product innovation in visitor experiences and the development of new tourism product and infrastructure is required to meet and manage this market demand from park visitors.

### Distance from Major Gateways

Investors believe there is definitely a market to make these natural tourism ventures viable if sites are within two and a half hours travel time from capital cities or other major gateways.

*"You can get people anywhere, but if it's going to cost too much and take too long, you're just limiting your market." Paul Davis, Bovis Lend Lease*

Certainty that there would be reliable and affordable transport infrastructure and access to a particular site within a reasonable travel time is critical to the investment decision.

Where a high yield niche market was identified, investors would consider more remote parks and sites.

However it was mentioned that few remotely located accommodation properties have returned their original capital.

### Environmental Sustainability

Investors were keen to develop and operate park natural tourism products that were environmentally sustainable and seen as such by consumers and the conservation sector.

*"Most large investment companies have adopted sustainability principles as part of their overall corporate responsibility and governance. They support programs which support the environment and often make decisions*

*on the basis of ethics. The days of building without regard for the environmental and social aspects of a development are over and those responsible for granting approvals should recognise this." Warwick McInnes, Bovis Lend Lease*

None of the investors interviewed raised concerns regarding compliance with environmental standards in parks. Environmental standards were viewed as a legitimate requirement and seen as contributing to the branding of their natural tourism product and meeting consumer preferences.

The concerns raised mostly referred to the uncertainty and time taken in the planning and approval process in determining these environmental standards with Government; and that developments need to be viewed on a case-by-case basis rather than a blanket 'one size fits all' approach.

*"There is a lack of clarity at the beginning of the process in order to work out exactly what environmental compliance is needed and the associated costs. If it's going to take me 12 months to do it, then fine, tell me upfront, give me a list of everything, I'll go away and do it and come back. But I don't want to be told that its going to take me three months and go back three times and it ends up taking 12 months – it all comes down to managing risk." Nick Whitby, Grollo Group*

Most of the investors surveyed did not have major concerns with the Federal environmental assessments under the EPBC Act required by the Department of Environment and Heritage. They perceived this as necessary to any planned developments. However, they were concerned that the current bilateral agreements between the States and the Commonwealth did not cover their proposals, resulting in another environmental assessment and approval process at the Federal level, making the process more complicated and costly for investors.

*"We don't know how we can get the departments to sit around the table; we don't know how we can speed things up. The sheer fact that there are no environmental bilateral agreements between the States and the Commonwealth is outrageous. That has cost me \$200,000 just because I had to use different consultants because there is no bilateral agreement between the Commonwealth and NSW." Joost Heymeijer, Emirates Hotels and Resorts*

## Recommended Action



***Constitute a 'one-stop-shop' of park, tourism and other government agencies for each potential Natural Tourism Partnership. The 'one-stop-shop' should be empowered to negotiate and approve all terms of a 'Partnership Agreement' with the private sector. Ensure the 'one-stop-shop' has commercial, conservation and marketing skills, and is authorised under all relevant State and Federal legislation.***

Investors also saw considerable business risks arising from threats to the environment. In the short term the impact of drought, bushfire and water shortages were perceived as a major risk to wildlife and the landscape (and hence the appeal of the regional park destination) as well as a direct risk to property. These risks are primarily being felt and managed through insurance.

As investors look to long term leases and investment in parks, the longer term threat of climate change becomes a more apparent business risk. This was particularly cited for long term investments in alpine areas. Generally investors cited a need for research on the impact of climate change on specific environments and an understanding of the cost and implications of climate change adaptation (see Section 9: Global Warming, Parks and Tourism).

In terms of broader sustainability, investors believe they made a contribution to both economic and environmental outcomes through:

- Fees and rents to park agencies.
- Environmentally sustainable facilities, structures and other developments.
- Increased local employment.
- Support for indigenous communities.

Investors wanted their economic contribution made through rent and fees to go directly to the park where they operated rather than to the park agency or state revenue. This would more readily demonstrate the contribution of the private sector operation to park conservation, as well as directly improving the park destination that is the primary tourism attraction.

Most investors were highly interested in delivering conservation and visitor services in the park where they operated as part of a broader partnership. Rather than contributing by paying rent to state revenue, operators would prefer



contributing by providing direct in-kind services to the park of equivalent financial value.

### Recommended Action

***Release park agency resources for conservation by utilising the private sector to deliver park visitor management and conservation services through Natural Tourism Partnerships.***



## 6.2 Barriers to Investment

Investors cited common barriers to investing in natural tourism in parks which were significantly affecting their ability to invest. The main barriers are:

- Identifying park tourism investment opportunities.
- Cost of building and operations in regional and remote areas.
- Lack of park visitor infrastructure.
- Uncertain government objectives.
- Ineffective planning and approval processes.
- Multiple levels of approval.
- Lease and licence tenure.

### Identifying park tourism investment opportunities

There is a lack of communication between Government agencies and investors regarding potential park tourism investments. Investors simply do not know where to look or who to ask regarding opportunities. Given the general lack of tourism planning for parks, park agencies are often not in a position to advise investors of planned or potential investments either.

To commence developing a national register, TTF Australia asked park agencies, tourism agencies and investors to identify potential Natural Tourism Partnership opportunities. A register of these opportunities can be found in Appendix A4. This process needs to be developed and maintained.

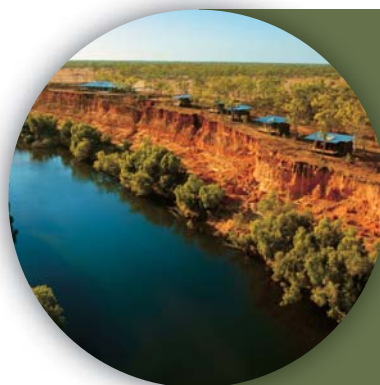
### Recommended Action

***Publicise a national register of potential natural tourism visitor experience and infrastructure developments which private sector investors can access and consider.***



### Cost of building and operations in regional and remote areas

Many park tourism investment opportunities are naturally located in regional and more remote areas. Irrespective of government policy and regulation, many investors cited the basic costs of building and operating in these areas as a major barrier to investment. Transport costs, labour and skill shortages and restricted suppliers were identified as causing time delays and additional costs compared to other tourism investments.



Wrotham Park Lodge,  
Queensland

Photo:  
Courtesy of Voyages  
Hotels & Resorts

These costs both cause, and are exacerbated by, a lack of basic park infrastructure such as power, water, sewerage and road access in these areas. Coupled with the need for easy access by tourists from major gateways, the geographic remoteness of tourism opportunities may make them commercially unviable for the operator; despite the economic contribution to park conservation and regional communities they could generate. This major barrier could be alleviated by greater government investment in park visitor infrastructure.

### Park Visitor Infrastructure

There is often a lack of access and basic infrastructure such as roads, power, water and sewerage in park destinations and sites that could sustainably support natural tourism experiences. Existing infrastructure for roads, car parks, visitor centres and facilities are already run down due to poor resourcing of park agencies and this infrastructure is unable to cope with current visitation.

Furthermore visitors are seeking innovative experiences which require new (but low impact) structures such as canopy walks and zip lines, rather than more 'passive' visitor centres.

Investors cite the lack of park visitor infrastructure as a major barrier to investment in parks. This barrier is exacerbated by the often higher cost of building parks infrastructure due to remoteness and environmental



standards; as well as the eventual loss of any investment in infrastructure under a leasehold arrangement.

Investors also cite that the Government is often not prepared to fund part of the infrastructure necessary despite the fact that the improvements are often on crown land and the infrastructure becomes a permanent asset eventually owned by the Crown.

*"The investor had a piece of infrastructure in a NSW National Park that was destroyed by a fire. In order to rebuild that infrastructure, parks actually asked them to pay a licence fee when they hadn't historically done that. These were circumstances where the park itself would have stopped functioning without this infrastructure."*  
Andrew Beatty, Baker and McKenzie

*"An integrated infrastructure approach is needed. The environmental standards are fine, I'm happy to comply with that, but it needs to be integrated. Large scale projects also need to be managed from the Government side."* – Investor

Basic infrastructure, rejuvenating and re-adapting existing facilities and new visitor experience structures need to be planned, integrated, developed and maintained with the support and partnership of both the private and public sectors.

## Recommended Actions



***Provide separate dedicated park agency budget funding for visitor management and visitor infrastructure which matches increases in park visitation.***

***Create Natural Tourism Partnerships between Federal and State/Territory Governments and the private sector to fund, develop and operate sustainable natural tourism visitor experiences and infrastructure which provide direct funding for park conservation and climate change adaptation.***

## Government Objectives

Opportunities for private sector involvement are often brought to the investor market without clear objectives for what the government wants to achieve.

Tourism investment opportunities proposed by government typically do not arise from considered park destination

branding and tourism planning. Nor are they usually proposed to meet the conservation or visitor appreciation, education and management objectives of park agencies.

Potential tourism investment projects in parks are often triggered by a desire by government to meet a rising liability or maintenance cost on an unproductive asset in a particular site, rather than to develop the visitor experience in a park.

Government is often uncertain what it wants from the project beyond private sector finance, and brings the project to the market to test private sector interest. The private sector tenders proposals which then go through lengthy planning, negotiation and approval processes by multiple government agencies to determine what is permissible.

*"Very often what's happening is the agencies are just testing the marketplace. They think they want to do something, Quarantine Station is one example, and then they're not sure. They put it out into the marketplace and then it goes on for 10 years"* Roy Melick, Baker and McKenzie

Consequently, investors repeatedly point to 'constantly changing goal posts' by multiple government agencies as a cause of delay and uncertainty throughout the process.

Essentially investors can spend years and considerable costs trying to determine what the Governments objectives are, and what they will allow, in a particular project.



The Tree Top Walk,  
Valley of Giants,  
Walpole-Nornalup  
National Park

Photo:  
Courtesy Western Australia

*"They [parks management agencies] need to have a clear concept of the type of development that they will allow, what is desirable, and then some commercial understanding of the investor's viewpoint. For example what is the style of development that they're allowing, what is the cost of development, what is the tenure and what is a realistic return on it. The difficulty is if they don't do any of that. What they say is 'we want you to build this, but then say by the way, you can't do any of this,*

*you can only build this', so it's all a bit in reverse. What the government needs to do is work internally to resolve all of the competing issues and say this is the offering that we worked out and can deliver" John Stawyski, Blake Dawson Waldron*

*"There is often a lack of understanding by the land owner and certainly unwillingness to share and limit the often considerable legal costs in respect of the preparation of all the legal documentation that is required by both parties. Both time and costs can exceed expectations with the result that both parties are stuck between abandoning the project and losing their investment or continue sinking money into the project. There are numerous examples where developers have been drawn into negotiations that can go on for years without certainty of outcome and involve huge costs and can destroy the financial viability of the project." John Simmonds, Stella Group*

The time, costs and uncertainty in the planning and approval process leads to "deal fatigue" among both investors and park agencies. The cost of the process leads to projects becoming financially unviable investments.

### Planning and Approval Processes

Overall the approval process is very time consuming and the length of time taken for approvals is too long and can take years. The Commonwealth legislation has a timeframe in which they will respond, but at the State level a reliable timeframe is not given or cannot be relied upon.

*"The delays went well passed promised and expected time frames. Expected approvals by February did not arrive until December, therefore we lost a season and wasted marketing money." - Investor*

Investors cite examples where the application can be 90% approved and then the final 10% of the project is delayed indefinitely. Often there is a lack of communication between parks management agencies and applicants on approvals currently in the system.

The approval process is affected by multiple legislation, multiple park management plans and multiple approval authorities. The legislation and plans are properly intended as a barrier to prevent inappropriate developments and activities but also create a difficult process for legitimate proposals. (see Table 2: Planning, Assessment & Approval Requirements)

*"In NSW, the National Park system is slowed up by management plans and Acts. The bureaucracy that has engulfed us and involved us has been amazing. State departments don't talk to each other, and give conflicting*

*advice on natural resources, environment and conservation, heritage. I have had to deal with 30 state government departments." - Investor*

Potential investors have learnt from previous experience and are no longer prepared to invest time and money into projects where the process is made too difficult for them. Some States, such as NSW, are perceived as more difficult than others.

The Victorian Government Taskforce and Western Australian Landbank (See Case Study 6) models of expediting the process and presenting proposals to the market "unencumbered" with most regulatory approvals for the site identified and finalised, was cited as a positive move towards partnerships between Government and the private sector. However investors also mentioned that some flexibility, rather than a fully prescribed proposal, was preferred to allow for innovation and input from the investor.

*"The point of difference with the West Australian model is that a decision has been made, cabinet has sanctioned it, all the parties have agreed that this is what they are proposing for that site and then it goes to market and potential investors know what the deal is from the outset. If you don't like the parameters, you walk away and your costs have been contained and you haven't spent years working out how long the piece of string is." Roy Melick, Baker and McKenzie*

*"The model of the Victorian Government Taskforce supported at the highest levels of State Government to expedite approvals is a good one, and served to remove a lot of barriers." Marshall Vann, MFS Living & Leisure Group*

Investors said that transparency and full disclosure of the development process in respect of environmental issues and compliance requirements, infrastructure and development costs was needed at the outset of the project - to enable the investor to undertake cost modelling and make the decision to proceed or withdraw.

### Recommended Action



***Undertake an internal planning, environment assessment and pre-approval process by government for potential natural tourism visitor experience and infrastructure developments. Present the 'pre-approved' sustainable Natural Tourism Partnership opportunities to investors for competitive tender.***

## Multiple levels of approval

Investors cited having to negotiate and comply with requirements of multiple government agencies at Local, State/Territory and Federal level was another major barrier. One recent investor cited having to work with up to 30 different government departments or agencies on one project and even when States/Territories may give approval for a project to proceed, it can then be overruled by Federal laws.

Examples were also provided where the views of the various approval authorities change during the approval process, or as new legislation is enacted, creating uncertainty for the investor.

*"Hayman Island is an example – I recall counting the agencies we had to deal with and it was 40 or more, everything was decentralised, everyone with their own set of rules, it was quite extraordinary to get the approvals that you need, or even to understand what you have to comply with. The bureaucracy was absolutely rampant. You don't really know what you're going to come up against because you just deal with one issue and another agency, or another section within the same agency, presents another hurdle." Roy Melick, Baker and McKenzie*

Compounding the problem of multiple approving authorities was that most of these agencies had no incentive or responsibility for delivering profitable and viable natural tourism experiences in parks. They might bear a political or other risk for approving one component of the investment proposal but had nothing to gain from doing so.

*"The Department of Environment and Conservation had no economic incentive to approve the development, and many incentives to not approve." - Investor*

Investors also noted a lack of clarity in relation to native title. Native title claimant groups are independent of government and for the developer these groups can be difficult to reach, and often they are family related rather than related to a broader language group. Sometimes different groups claim to be the native inhabitants of that area and little assistance is given to investors to investigate these claims before committing to a project.

Investor feedback stated that single planning and approval authorities such as the Great Barrier Reef Marine Park Authority (see Case Study 5) and Sydney Harbour Federation Trust worked well. These agencies had the advantage of being Commonwealth authorities responsible for areas in the Federal jurisdiction, removing the State and Local Government layer of approval. These agencies operate with greater independence than Departments of Environment and tended to have a more positive management culture regarding the tourism industry.

## Recommended Action



***Constitute a 'one-stop-shop' of park, tourism and other government agencies for each potential Natural Tourism Partnership. The 'one-stop-shop' should be empowered to negotiate and approve all terms of a 'Partnership Agreement' with the private sector. Ensure the 'one-stop-shop' has commercial, conservation and marketing skills, and is authorised under all relevant State and Federal legislation.***

## Management Cultures

Investors and park managers have both expressed frustrations with the management cultures and expectations of each other as barriers to prospective partnerships. Management cultures obviously vary from park agency to park agency and from investor to investor, however common trends did emerge.

Investors primarily raised concerns with the culture of some park agencies where they believed tourism is viewed as a hindrance rather than an asset. This was particularly felt to be the case at a local park management or regional level. Investors were dispirited by the lack of trust in them, particularly on environmental and financial matters.

*"Developers should not be seen as the enemy – the most successful companies today have embraced the highest sustainability and environmental standards in their sites and are well aware of consumer attitudes towards these principles." Warwick McInnes, Bovis Lend Lease*

Investors identified a lack of incentive within the parks system to approve natural tourism applications as the primary problem, leading to mistrust and resistance to facilitate developments.

In particular, investors noted a lack of financial experience of some park agency personnel making the decisions, approving applications and in contract negotiations for larger-scale projects. There is a general view that the personnel of the agencies making the decisions are not commercially aware or commercially minded. There is also a lack of understanding about what makes such a project financially viable versus what might be appealing as a tourism demand generator.

*"There is a culture in some national parks of 'locking the gates and not letting anyone in'. There is a lack of*

*business skills and a change in culture needed. The problem is they don't understand the financial side and they are inherently distrustful of anyone who does."*  
Warwick McInnes, Bovis Lend Lease

Park managers cited a lack of understanding by investors of the multiple objectives (particularly conservation objectives), community expectations and complex regulation that park agencies must manage. Park managers expressed frustration that investors did not appreciate that the park agency goes well beyond parks tourism and that their conservation objectives are fundamental to preserving the 'naturalness' that visitors value.

Park managers primarily come from a science background, rather than having tourism or commercial experience, and possess a passion for conservation which is their primary focus. Equally, not all investors have established expertise and a positive management culture on environment matters.

*"Park agencies largely do not have a strong tourism focus compared to their clearer role in managing biodiversity and for which much of their resources are allocated. There is often not a significant proportion of staff [in park agencies] with the appropriate commercial private sector experience to deal with NTPs."* – Senior Park Manager

Fundamentally, investors and park managers have had limited experience in dealing with each other and valuing each others objectives and contribution. While management cultures are changing amongst both investors and park managers, mistrust and lack of similar expertise remains a barrier to developing a partnership approach.

Natural Tourism Partnerships can address these cultural issues. As these partnerships are designed to provide shared risks and returns that meet the multiple objectives of parks and tourism, they provide a better incentive to both partners.

*"There needs to be a contractual relationship binding both parties to co-operate and work together on an ongoing basis with a sharing of costs and financial penalties if the agreement is not adhered to."* John Simmonds, Stella Group

Using the "Partnership Criteria" to assess private sector tenders will assist park agencies to identify reputable investor partners with environmental expertise (see Section 2.2: Natural Tourism Partnership Criteria and Assessment). Acquiring and consolidating government conservation, tourism and financial skills in a one-stop-shop to relate to the private sector will similarly assist the cultural environment for the private sector.

## Recommended Action



***Constitute a 'one-stop-shop' of park, tourism and other government agencies for each potential Natural Tourism Partnership. The 'one-stop-shop' should be empowered to negotiate and approve all terms of a 'Partnership Agreement' with the private sector. Ensure the 'one-stop-shop' has commercial, conservation and marketing skills, and is authorised under all relevant State and Federal legislation.***

## 6.3 Lease Tenure and Viability

Investor interviews revealed significant barriers to private sector investment in parks tourism, arising from the fundamental nature of leasehold arrangements.

The fundamental fact of leasehold is that any investment in the leased site is eventually lost to the investor, as possession of all structures, capital works and improvements reverts to the Crown at the end of the lease. This creates several barriers to investment:

- 1. Cost of Finance:** As assets are not owned in perpetuity there is no ultimate security for the investment. Finance raised for such investment comes at a higher premium due to the lack of security, leading in turn to higher repayment costs.
- 2. Loss of Capital and Capital Gain:** Since possession of assets ultimately reverts to the Crown, the assets cannot be sold to recover the investment or achieve a capital gain. Even if the lease allows the investor to on-sell, the sale price will be heavily discounted by the purchaser in the knowledge that the assets revert to the Crown.
- 3. Commercial Viability:** This cost of finance, the lost capital and capital gain forgone become expenses that must be recovered by commercial returns within the period of the lease. Significantly higher than normal returns are required to cover this expense and still achieve a commercially viable net profit.

These barriers to capital investment in leased sites are often exacerbated by the need for high start up investment in basic power, water, sewerage and access infrastructure. The net effect of these barriers is that tourism investments that would be viable on freehold land become unviable in parks.



Table 1 provides a summary of the Commonwealth, State and Territory maximum length and other major limits on Leases and Licences in parks and other crown land.

## 6.4 Alternative Partnership Models

Alternative models to share these investment risks and returns in park partnerships have been proposed by investors. Interestingly investors did not propose or expect the granting of freehold in parks, rather reforms to leasing arrangements to allow for a partnership approach.

The following proposed models are not mutually exclusive and could be considered in combination in any major investment:

### Government Investment in Partnerships

Considering the assets eventually revert to the crown, partial government funding should be considered for start up basic infrastructure capital costs, particularly where a project would otherwise be unviable. Greater up-front funding should be accompanied by greater returns to government during the life of the lease.

### Buy-back models

Leases could provide for a buy-back payment to the investor if and when possession reverts to the crown. The buy-back payment would be on agreed formulae, such as investment cost plus inflation less depreciation, to an agreed upper limit. This would provide a degree of security for the investor, reduce the cost of finance and provide greater returns to be shared with government during the life of the agreement.

### Sharing Returns

Returns to the government should be based on an agreed share of net profit or at least transaction rents, rather than ground rents. This should provide an incentive for both partners to ensure the commercial viability of the project. Essentially this is designed to share the risk and returns on the investment.

### Longer Lease Lengths

Longer lease lengths mitigate the barriers to investment by providing a longer period over which to spread the cost recovery on the investment. Appropriate lease lengths need to be assessed on a case by case basis depending on the life-cycle of the investment, amount invested, risks and returns.

*"The maximum lease Parks Victoria can put on is 21 years. When you're putting in infrastructure that's got a life of 40 years, and you're talking \$5-\$10 million investment, 21 is not enough." Nick Whitby, Grollo Group*

As a very general guide, investors have indicated the following lease lengths would need to be available for viable investment:

Capital Investment	Lease length
\$2M	5-7 years
\$3M	10-15 years
\$5M	15-25 years
\$10M	25-40 years
\$20M	40-60 years
\$50M	60-90 years

Many park systems have legislative, policy or custom and practice limits on lease length which effectively prohibit significant investment in parks. Some park systems allow for lease renewal options that can extend the total length of the lease. However, investors report that these renewal options generally do not provide sufficient certainty to positively affect the investment decision.

*"If you are investing in a 25 year resort, the leases need to reflect 25 years of security, not 10 years of security and then 15 years of we'll just see how it goes. There needs to be some longevity to it. The level of investment should determine the length of tenure." Nick Whitby, Grollo Group*

Investors support lease lengths being negotiated on a case by case basis depending on agreed capital investment, risks and returns. This process needs to be supported by the removal of lease length limit on a general or case-by-case basis, the development of agreed models and the availability to partners of both commercial and environment risk management expertise.

## Recommended Action



**Review maximum lease and licence limits in park legislation and implement a policy of granting tenure based on the Natural Tourism 'Partnership Criteria', including risk, capital invested and viable returns for private sector and park agency partners.**



### Performance Leases

An alternative model is to provide a lease without absolute term limits but performance milestones which must be met for the lease to continue. For this model to work, the investor must have confidence that if the performance standards are met, continuation of the lease is certain. Performance standards could encompass environmental standards as well. Again this is a risk and return sharing approach.

### Land Swap Leases

A variation of the performance lease, a private investor could dedicate a freehold site to the protected area system in return for leasehold at another site in an existing park. The lease term would continue as long as the equivalent freehold site was dedicated and managed to an equivalent protected area category.

*"Natural Tourism Partnerships can work where there is a clearly defined business model, the negotiations are handled by people with a 'commercial' hat on, a mutual understanding and acceptance of the outcomes each party is trying to achieve and where one party is not bearing all the financial risks." John Simmonds, Stella Group*

### Diversity of Partnership Models

The proposed models listed above represent the most common suggestions by investors. There is a broad diversity of potential partnership models that have also been raised by stakeholders. A common theme to these partnership models is sharing risk and returns through a diversity of partners.

Natural Tourism Partnerships need not be a bi-lateral model but could include multiple partners from Federal, State/ Territory and Local Government, statutory authorities, indigenous communities, private sector investors, private sector operators, conservation sector NGOs, farmers and other bodies with a property or other interest in natural areas. (see Case Study 1: Tourism and community partnerships)

### Recommended Action



**Revise park regulation to enable Natural Tourism 'Partnership Agreements', with broader scope than current lease and licence arrangements and allow for partnerships which have shared tourism and conservation objectives and shared risks and returns on revenue and tenure.**

**Table 1 - Legislative Lease & Licence Term Limits as at 1 January 2007**

LEGISLATION	SECTION	RIGHT	MAXIMUM TERM	LIMIT AREAS
MSN	National Parks and Wildlife Act 1974	S151 S47U S47GC	Leases to build and/or operate	National Park, Historic Site, State Conservation Area, Regional Park, Karst Conservation Areas, Nature Reserves but not Wilderness Areas
	National Parks and Wildlife Act 1974	S151B(2)	Leases for adaptive reuse	
	National Parks and Wildlife Act 1974	S151	Licence	
	National Parks and Wildlife Act 1974	S151B	Licence	
	National Parks and Wildlife Act 1974	S152	Licence	
	National Parks and Wildlife Act 1974	S153A	All	
	Forestry Act 1916	S33	Lease	
	Crown Land Act 1989	S41	Lease	
	National Parks and Reserves Management Act 2002	S43	Licence	
	National Parks and Reserves Management Act 2002	S43	Lease	
				Wilderness Areas
				State Forests & Timber Reserves
				Other crown land
				National park, State reserve, Nature reserve, Game reserve, Conservation area, Nature recreation area, Regional reserve, Historic site
TAS				

LEGISLATION			SECTION	RIGHT	MAXIMUM TERM	LIMIT AREAS
VIC*	National Parks Act 1975		S19(2)	Lease	20 years for Kiosk Café, Store, Ski Tow for not more than 1 hectare	National Parks, State Parks, Marine National Parks, Marine Sanctuaries and Other Parks but not Wilderness Parks
	National Parks Act 1975		S19(2)	Lease	7 years for a camping ground or building	
	National Parks Act 1975		Various	Lease	Up to 21 years have been provided for in amendments allowing special provisions relating to particular Parks	E.g. Ski fields at Mt Buffalo National park and Lighthouse at Great Otway National Park
	National Parks Act 1975		S21(1)	Permit	3 years for trade or business permit	All Parks but with specific limits in Wilderness Parks
	Forests Act 1958		S51	Lease	21 years	Reserved Forests
	Forests Act 1958		S52(1)	Licence	3 or 20 years	Forests
	Crown Land (Reserves) Act 1978		S17	Licence & Tenancy	3 years	Crown land reserved for certain purposes
	Crown Land (Reserves) Act 1978		S17D	Lease	21 years	Crown land reserved for purposes except conservation but including tourism.
	Crown Land (Reserves) Act 1978		S14D	Lease	21 years	Crown land reserved for certain purposes and managed by an incorporated committee.
SA	National Parks and Wildlife Act 1972		S35(3)	Lease	No limit specified	National parks, Conservation parks, Game reserves, Recreation parks, Regional reserves
	National Parks and Wildlife Act 1972		S35(4)	Licence	No limit specified	
	Forestry Act 1950		S10	Lease	No limit specified	Forest reserves
	Forestry Act 1950		S11	Licence	No limit specified	Forest reserves
	Conservation and Land Management Act 1984		S100	Lease	21 years + option for another 21 years	National parks, Conservation parks, Parks, Nature reserves, Marine nature reserves;
WA	Conservation and Land Management Act 1984		S97	Lease	21 years + option for another 21 years	State Forest, Timber Reserve
NT	Territory Parks and Wildlife Conservation Act		S16	Lease	No limit specified	
	Territory Parks and Wildlife Conservation By-Laws		S13	Permit	No limit specified for commercial permits Current policy is 3 years	
QLD	Nature Conservation Act 1992		S34	Lease	No limit specified	
	Nature Conservation (Admin) Regulation 2006		Reg 19	Permit	Commercial activity permit--3 years	National Park, Conservation Park, Resources Reserve.
	Nature Conservation (Admin) Regulation 2006		Reg 88	Agreement	Commercial activity agreement--10 years	
	Land Act 1994		S32	Lease	Lease over a reserve - 30 years	State land reserved for community purposes
C/WEALTH	Land Act 1994		S155	Lease	50 years or 100 years State land	
	Environment Protection and Biodiversity Act 1999		S358	Lease & Licence	No limit specified Commonwealth Reserves	
	Great Barrier Reef Marine Park Act 1975					
	Great Barrier Reef Marine Park Regs 1983 + Queensland's Marine Parks Acts		Various	Permit for tourism operations e.g. pontoons	No limit specified. Policy is 6 years and 15 years for eco-certified operators.	Great Barrier Reef Marine Park
*Victoria's Nature-based tourism Strategy 2007-2011 provides a new policy for longer term leases of up to 65 years that match tenure to return on investment and increases maximum licence terms to 10 years.						

# 7: The Park Regulatory Systems

Private sector investment and involvement in parks faces a complex legislative and regulatory environment. Beyond the normal State and Territory planning, assessment and approval regimes, NTPs are affected by specific legislation for parks and protected areas. This legislation may replace, or overlay, the normal planning and approval processes.

The complex regulatory environment is a by-product of the crucial conservation objectives of parks. It should not be forgotten that conservation regulation preserves the parks natural and cultural values for visitors.

## 7.1 Park Systems and Park Agencies

Australia has nine separate park systems – one from each State and Territory and a Commonwealth system. Each park system has enabling park legislation which provides the legal means to acquire, reserve and manage land and marine areas.

The legislation typically provides statutory powers to manage parks and protected areas through a government park agency. These park agencies may be statutory authorities or divisions of a State Government Department of Environment. Park agencies may exercise legislative powers in their own right and/or under delegation from the relevant Environment Minister or Departmental Secretary. The main park agencies for Australia's park systems are:

- Parks Australia Division of the Commonwealth Department of the Environment and Water (DEW).
- The Great Barrier Reef Marine Park Authority (GBRMPA).
- Queensland Parks and Wildlife Service (QPWS) of the Environment Protection Agency.
- New South Wales National Parks and Wildlife Service (NPWS), the Parks and Wildlife Division of the Department of Environment and Conservation.
- Tasmanian Parks and Wildlife Service (TPWS) of the Department of Tourism, Arts and the Environment (DTAE).
- National Parks and Wildlife South Australia (P&WSA) Division of the Department for Environment and Heritage (DEH).
- Parks and Wildlife Service NT (P&WNT) Division of the NT Department of Natural Resources, Environment, and the Arts.

- Western Australian Department of Environment and Conservation (WA DEC).
- Parks Victoria (PV) under management agreement to the Department of Sustainability and Environment (DSE).

There are many park agencies in Australia which manage other protected areas ranging from forest agencies to local government, authorities and trusts for particular gardens and reserves. However the vast majority of protected areas are managed by the main agencies.

### Park Management

Park agencies manage parks and their use in accordance with the legislation and government policy to achieve the objectives for which the park area was reserved.

In practical terms, managing parks often revolves around managing the often conflicting interests and values of the community in: conservation, tourism, heritage, indigenous culture, fishing, hunting, agriculture, forestry and bushfire management.

Park agencies cite the need for the tourism sector to recognise the range of expectations on parks through broader partnerships which aim to balance outcomes, rather than one-on-one relationships seeking to favour tourism over other objectives.

## 7.2 Overview of the Regulatory Systems

The various park regulatory systems have a significant impact on the potential for NTPs. Legislation, regulations and prevailing policies can also differ from system to system. This overview highlights the key elements of all park systems which have a significant impact on NTP investment decisions and commercial viability.

Park categories and management objectives fundamentally determine whether NTPs are allowable in a given category of park. The statutory plan of management implements the management objectives in a particular park and determines how that park is managed as a visitor destination and what NTPs are allowable in that specific park.

Assessment of environmental, heritage and other factors will determine whether a proposed NTP will be granted approval in a specific park and site. The regime of leases and licences determines who can approve an NTP and what limitations there are on the rights that can be granted. Finally, the financial mechanisms of the system determines what revenue is collected from park use and whether that revenue contributes to the parks system.

## Categories and Management Objectives

There are over 50 categories of parks and protected areas in Australia, ranging from strict wilderness parks to national parks, state parks and even some forest and game reserves.

The 'objectives' or 'principles' of the legislation defines the category and management objectives for reserving the area and therefore the allowable use of that area. The degree of restriction ranges from categories that do not allow for commercial activity or organised visitation at all, to categories which allow managed tourism, fishing, forestry, hunting and mining.

Park categories differ from one park system to another and even standard categories, such as "national park", have a different meaning from one system to another.

All parks and protected areas have a conservation objective by definition. Park visitor use for appreciation of the natural and cultural values of parks is a management objective of some park categories. This objective is usually described in terms such as "public appreciation and understanding" and "sustainable visitor use and enjoyment that is compatible with conservation objectives". Some State park legislation, for example Queensland, does not mention visitors or recreation at all.

This tourism objective of visitor use and enjoyment of parks, generally faces less restriction than extractive uses such as forestry and mining. However, where organised visitor use is not a management objective of a park category (eg wilderness areas) options for NTPs will be highly restricted.

Where visitor use is a management objective, the way the objective is interpreted may see visitation treated as a public good not to be restricted by user pays. Similarly the visitor use objective may be interpreted as requiring a strong nexus to the natural and cultural values of the park and not extending to raising revenue for parks. For example an organised tour of the natural features of a Park may be seen as meeting the objective of the park but holding a wedding in the park may not – even if a wedding produced revenue for park conservation and had minimal environmental impact.

Parks can be tourism drawcards which make a significant contribution to regional economies; however this role is not a management objective of parks in legislation. Nonetheless park tourism is a major day to day responsibility of park agencies of significant economic importance.

Park agencies have identified the economic, recreational, educational and public health contribution of parks tourism as a key element to public and political support for parks.

Most park agencies have commissioned economic assessment of the value of parks to regional economies and the Sustainable Tourism CRC is currently developing a national assessment of this economic contribution.

## Recommended Action



***Assess the findings of the upcoming Sustainable Tourism CRC research on the economic contribution of Australia's parks and evaluate increased budget funding for park agencies accordingly.***

Often the conservation and tourism objectives of parks have been seen as conflicting principles to be managed. Alternatively they can be seen as complimentary objectives where tourism supports conservation through education, financial contribution and managing visitor impact.

## World Heritage Areas

Many of Australia's tourism icons are listed World Heritage Areas. Whether these World Heritage Areas are in Commonwealth or State parks, their listing creates international obligations for the protection and management of the area and the application of the Commonwealth Environment Protection and Biodiversity Conservation Act 1999 (see Appendix A3.1.1. Matters of National Environmental Significance).

One aspect of the World Heritage listing which favours tourism is the international obligation to not only protect the areas but 'present' them. Presenting these areas is a clear management objective and World Heritage status is generally considered to be a highly appealing brand for tourists. (see Section 8: World Heritage Branding & Marketing)



Three Sisters,  
Blue Mountains  
World Heritage Area.

*Photo:  
Adam Taylor -  
Aubergine Productions  
Courtesy Tourism  
New South Wales*

## Guidelines for Protected Area Management Categories<sup>20</sup>

IUCN World Commission on Protected Areas

Protected Area Categories

Ia

Strict Nature Reserve: Protected Area managed mainly for science

Ib

Wilderness Area: Protected Area managed mainly for wilderness protection

II

National Park: Protected Area managed mainly for ecosystem conservation and recreation

III

Natural Monument: Protected Area managed for conservation of specific natural features

IV

Habitat/Species Management Area: Protected Area managed mainly for conservation through management intervention

V

Protected Landscape/Seascape: Protected Area managed mainly for landscape/seascape conservation and recreation

VI

Managed Resource Protected Areas: Protected Area managed mainly for the sustainable use of natural ecosystems

Matrix of management objectives and IUCN protected area management categories

Protected Area Category	Ia	Ib	II	III	IV	V	VI
Management Objective							
Scientific research	1	3	2	2	2	2	3
Wilderness protection	2	1	2	3	3	-	2
Preservation of species and genetic diversity	1	2	1	1	1	2	1
Maintenance of environmental services	2	1	1	-	1	2	1
Protection of specific natural/cultural features	-	-	2	1	3	1	3
Tourism and recreation	-	2	1	1	3	1	3
Education	-	-	2	2	2	2	3
Sustainable use of resources	-	3	3	-	2	2	1
Maintenance of cultural/traditional attributes	-	-	-	-	-	1	2

Key: 1 Primary objective, 2 Secondary objective, 3 Potentially applicable, - Not applicable

### IUCN Protect Area Management Categories

There is an internationally defined set of management categories, known as IUCN (World Conservation Union) categories.

The IUCN categories determine the management objectives of each park. Tourism and recreation is a primary management objective of Categories: (II) National Parks, (III) Natural Monuments and (V) Protected Landscape/Seascape. Tourism is also applicable in other categories.

Generally, the IUCN Categories provide a clearer and more universal definition of the multiple objectives of parks than most State and Territory park legislation, particularly the tourism objective. For example, the IUCN Category (II) National Parks has the stated management objective of:

*"to protect natural and scenic areas of national and international significance for spiritual, scientific, educational, recreational or tourist purposes;"<sup>21</sup>*

This objective clearly points to tourism, education and recreation as an appropriate use of a National Park but only to the extent that tourism is compatible with the environment and cultural values of the park. Conservation is the primary objective, to protect the integrity of the park for future generations to use – including for tourist purposes.

Currently only Commonwealth Reserves are classified by this IUCN system in park legislation. Most State and Territory park systems have nominally allocated their parks an IUCN category but these parks must still legally be managed according to the objectives of their current park legislation. This can cause uncertainty as leases granted to the private sector have been successfully challenged in court because the purpose of the lease does not have a strong nexus to the legal management objective of the park (see Appendix A3.2 NSW System).

*"The committee believes the work of the IUCN provides an adequate basis for understanding the range of values that form the foundation of Australia's conservation estate ... It would seem that the public, park managers and tourism operators could all benefit from going a step further than just nominally assigning each reserve to one of these [IUCN] categories. The time may be right for a review and rationalisation of how reserves are labelled and how the reserve system is managed as a whole"<sup>22</sup>.*

Some park agencies have expressed concern that adopting the IUCN categories in park legislation would leave their system vulnerable to any changes to the IUCN categories made by the World Conservation Union. However, the IUCN categories are accepted internationally



and can provide a foundation for a true “national” park system while providing certainty on the park tourism objective.

One option would be to enable Environment Ministers to legally classify individual parks with an IUCN category, without having to apply the IUCN categories to all parks. This would enable the Environment Minister to re-classify an existing park to be managed to IUCN standards, but revert to the previous park category should changes to IUCN categories be deemed inappropriate for the park. Overtime this could lead to a managed migration to a ‘national’ park system consistent with the international standard.

### Recommended Action



***Enable Environment Ministers to legally classify targeted parks using the IUCN categories and manage those parks for conservation and tourism objectives.***

### Plans of Management

Legislation across all jurisdictions requires a plan of management (PoM) for each park. Some park legislation (e.g. South Australia) allow for a PoM to cover multiple parks, but the vast majority of parks have an individual PoM for each individual park.

The management objectives for the park are given effect through the PoM which is an instrument to plan and manage conservation, visitor use, facilities, infrastructure, works, tourism and commercial activities in that particular park.

The park agency, Departmental Secretary or Environment Minister who is the determining authority to approve commercial activities in parks (through leases and licences) is usually required by legislation to act in accordance with the PoM for that park. If a current PoM does not allow for an NTP then the only avenue may be to vary the PoM.

Parks legislation in each state ranges from being highly prescriptive to almost silent on the processes to develop, approve, review, amend and revoke a PoM. In some systems the process (irrespective of the merits) of varying a PoM can be prohibitive and potential NTPs never pass this first hurdle. This is particularly true if the investor must advocate for variation to a single PoM to allow a specific NTP venture (see Section 6: The Investment Environment). Many PoMs hold in perpetuity until varied or are only required to be reviewed every 5-10 years. This fact,

together with the difficulties in varying a PoM, can create a barrier to innovation in NTPs.

PoMs are a local instrument for an individual park and are therefore not an effective mechanism for planning destination management, tourism marketing or NTPs across multiple parks. Park agencies are increasingly implementing strategies for visitation and tourism across a destination or system which overlay and drive individual PoMs such as NSW's Living Parks: A Sustainable Visitation Strategy for NSW National Parks (see also Case Study 6: Landbank and Case Study 8: National Landscapes). These strategies enable PoMs to be reviewed in the context of an overall strategy rather than a single NTP proposal.

PoMs are crucial not only to the initial approval, but the ongoing commercial viability of an NTP. Visitor facilities, visitor numbers, tracks, roads, carparks, infrastructure, signage, competitor tourism operations etc for the park are all determined through the PoM and all effect the ongoing viability of an NTP.

Park legislation generally does not provide specific rights for commercial lease holders in the PoM and management of the park and overall destination. Lack of certainty over the management of the park as a destination can be a barrier to initial investment as well as ongoing commercial viability.

### Recommended Action



***Revise plans of management for targeted parks to allow for sustainable visitor experiences and infrastructure according to the park destination National Landscape Master Plan.***

### Assessment and Approval

Assessment and approval of a proposed NTP is generally undertaken in accordance with both the parks legislation and the relevant state heritage and environmental planning and assessment legislation. Since conservation is the principle management objective of parks, potential NTPs are assessed to high environmental standards.

Typically parks legislation will establish the park agency, Secretary and/or Environment Minister as the determining authority depending on the proposal. Assessment by the determining authority generally involves an initial review of environmental factors, which may lead to a more comprehensive environmental impact statement. Environmental, heritage and other regulatory factors will be assessed by

Aerial view of  
Ningaloo Marine Park

Photo:  
Courtesy of Tourism  
Western Australia



the determining authority in accordance with the parks legislation and/or the applicable state environmental planning and assessment legislation.

Since the legislative planning instrument for individual parks is the PoM, local park management is critically involved in the approval process. Although many park agencies are now operating as divisions of a Department of Environment, this does not mean that a potential investor is developing a project with a single government entity.

Departmental management structures may see approval processes split across the park agency, environment, wildlife and/or heritage divisions of the Department or even a separate authority such as a Heritage Council. These divisions are typically responsible for particular values, such as heritage, but do not share responsibility for achieving the tourism objective of parks. Nor do these divisions have a stake in the economic contribution of NTPs to parks.

Major NTPs in parks will almost certainly have an impact outside the park boundaries resulting in the involvement of local government (or other government agencies such as forest agencies) in the assessment. If development such as road access is needed outside park boundaries, then another determining authority will be involved.

Additionally, any NTP which may have a significant impact on a “matter of national environmental significance” will require assessment and additional approval by the Commonwealth under the Environment Protection and Biodiversity Conservation Act 1999 (EPBC Act) (see Appendix A3.1.1). The EPBC Act does allow for bilateral agreements which enable State Governments to undertake this assessment and approval. While bilateral agreements are currently in place with the States, their scope is limited and do not seem to avoid a duplication of assessment and approval in many cases.

In short the assessment and approval process for an NTP can involve every level of government, multiple

agencies within a level of government and multiple divisions, including the local park management. Investors cite “constantly changing goal posts” as the main barrier arising from the assessment and approval processes. These “changing goal posts” arise from the multiplicity of government approval authorities and the changing response of these government bodies to multiple community groups with disparate views. These “changing goal posts” result in major time delays and considerable costs (see Section 6: The Investment Environment).

Behind the assessment and approval process, lies the reality of competing community beliefs as to the appropriate use of parks. Tourism proposals can be furiously controversial, typically at the local level but at times opposed by State and National conservation groups.

*“An approval process is as much about managing conflicting community expectations as managing the environmental impact on parks”- Senior Park Agency Manager*

Nor should it be assumed that the conflicting expectations relate only to balancing conservation and tourism interests. Park agency decisions are challenged by interests ranging from nearby residents groups to competing industries such as fishing and even competing tourism businesses.

The multiple levels of government agencies and divisions involved in the approval process can exacerbate this conflict simply by providing multiple opportunities to do so. More fundamentally, the multiple divisions involved do not share the responsibility or incentive for achieving an overall balance and tend to concentrate on a particular community expectation.

This is not to say that these community expectations are not valid, they have been a fundamental mechanism in establishing the park system and preserving park values over the years. There is consequently a high degree of “ownership” of the parks system among the conservation movement and hence an understandable protectiveness towards the values of parks. However the current process can lead to the “constantly changing goal posts”, major time delays and considerable approval costs identified by investors.

Ideally these community expectations should be addressed early in the process by a single government body responsible for balancing all the multiple objectives (and community expectations) of parks. This may well mean that an NTP proposal may be assessed as inappropriate or have so many limitations attached that it becomes unviable. However it should not require major costs and time delays by an investor to clarify this government determination.

Early assessment of 'appropriateness' is the key to success. This assessment should include early engagement with park stakeholders from the conservation sector, the tourism industry and local community.

Addressing community expectations should also be assisted by the use of NTPs designed to meet the multiple objectives of parks rather than just the commercial interest of the investor.

Investors report that some park agencies are easier to navigate than others. Generally park agencies that have a degree of independence, and ability to act as a single determining authority, seem to be able to take a more scientific approach to assessment and approval.

For example, the legislative design of Great Barrier Reef Marine Park Authority (GBRMPA) as a statutory authority means that GBRMPA essentially operates as a single determining authority and one-stop-shop for commercial tourism operations in the Great Barrier Reef. (see Case Study 5)

Tourism Western Australia and the WA DEC have also developed the Landbank Initiative (see Case Study 6: Landbank) as a one-stop-shop approach where government agencies undertake the planning and assessment process and then present a site largely 'unencumbered' to investors for a competitive tender.

## Recommended Action



***Undertake an internal planning, environment assessment and pre-approval process by government for potential natural tourism visitor experience and infrastructure developments. Present the 'pre-approved' sustainable Natural Tourism Partnership opportunities to investors for competitive tender.***

## Recommended Action



***Constitute a 'one-stop-shop' of park, tourism and other government agencies for each potential Natural Tourism Partnership. The 'one-stop-shop' should be empowered to negotiate and approve all terms of a 'Partnership Agreement' with the private sector. Ensure the 'one-stop-shop' has commercial, conservation and marketing skills, and is authorised under all relevant State and Federal legislation.***



Diving the Great Barrier Reef

Photo:  
Courtesy of Tourism  
Queensland

## Case Study 5:

### Great Barrier Reef Marine Park Authority



#### GBRMPA one-stop-shop model in achieving sustainable tourism partnerships

The arrangements concerning tourism within the GBRMP are an example of a successful interjurisdictional approval process.

The Great Barrier Reef is one of the world's most important natural assets. It is the largest natural feature on earth. As the world's largest UNESCO-recognised World Heritage Area, it is also one of the world's most recognisable tourism icons. The Reef receives nearly 2 million tourists and 4.9 million recreational visitors each year.

The Great Barrier Reef Marine Park Act 1975 established the Great Barrier Reef Marine Park Authority (GBRMPA) as a Commonwealth statutory authority and body corporate. GBRMPA is the principal adviser to the Commonwealth Government on the care and development of the Great Barrier Reef Marine Park.

The primary goal of the GBRMPA is to provide for the protection, wise use, understanding and enjoyment of the Great Barrier Reef in perpetuity through the care and development of the Great Barrier Reef Marine Park.

Through the Great Barrier Reef Marine Park Act, GBRMPA and the tourism industry have achieved a well-managed, sustainable industry, significantly improving environmental, cultural and business outcomes in the Marine Park.

This achievement is attributed to a combination of the one-stop-shop structure of the GBRMPA, and an organisational culture that strives to work for shared goals and develop sustainable partnerships with the tourism industry.

#### Business Model

The Great Barrier Reef Marine Park Act 1975 established a multiple use approach to management where commercial fishing and tourism co-exist with an overarching conservation objective. This concept has underpinned management of the Marine Park.

The GBRMPA is structured to provide a tight focus by concentrating on major critical issues and to ensure clear, internal reporting lines and accountability. The four Critical Issues Groups are Fisheries, Tourism and Recreation, Water Quality and Coastal Development and Conservation, Heritage and Indigenous Partnerships.

As a statutory authority with responsibility for zoning, planning and approval of an entire Park destination, the GBRMPA has effectively acted as a one-stop-shop for tourism investors and operators.

The GBRMPA:

- Develops zoning plans for the Marine Park ranging from "General Use" to "Preservation".
- Prepares Plans of Management for areas, species and ecological communities within the Marine Park consistent with the zoning plans.
- Issues Permits for tourism operations in the Marine Park. These Marine Parks permits are often two permits in the one approval. They grant permission for activities in both state marine Parks and the Great Barrier Reef Marine Park. Permits are required for a range of activities in the Marine Park. Generally permits will be required for most commercial activities, including tourist operations, installation and operation



of structures, such as jetties, marinas, pontoons and aquaculture facilities and any works, such as repairs to structures, dredging and dumping of spoil, placement and operation of moorings.

The Authority is part of the Environment and Heritage Portfolio. The Federal Minister for the Environment and Heritage has overall responsibility for the Authority. However, as a statutory authority established by legislation, the Authority has a degree of independence from the Minister.

### **Partnership Arrangements**

The GBRMPA has shaped successful partnerships with investors and private tourism operators. They have developed a number of programs that work to achieve conservation objectives, while supporting operators in achieving business success.

The main partnership activities include (but are not limited to):

- The High Standard Tourism Program, which rewards tourism operators who achieve high standards. The GBRMPA recognises the ECO Certification Program operated by Ecotourism Australia. Certified operators receive benefits from the GBRMPA including the opportunity for a longer-term operating permit (up to 15 years), listing on the GBRMPA website and showcasing at national and international trade events.
- The Tourism and Recreation Reef Advisory Committee (TRRAC) which is a senior level committee that provides the GBRMPA with regular advice on the management of tourism in the Marine Park. The TRRAC identify emerging issues such as the effects of climate change and fostering of Indigenous participation in tourism and its management.
- The Eyes and Ears Incident Reporting Program which encourages operators and crew to report suspected incidents to the GBRMPA. This program recognises that as tourism operators are regularly on the water they can actively report suspected incidents.
- Partnership monitoring programs, where tourism operators voluntarily monitor sites they visit and report observations to the GBRMPA and researchers.
- The Tourism Operator's Handbook for the Great Barrier Reef, describes everything an operator needs to know to operate in the Marine Park and was developed in cooperation with the industry.

### **Success Factors**

The success of the GBRMPA in achieving strong tourist and recreational visitation while driving the core conservation objective can be attributed to a combination of three key factors.

First, the legislative design of the GBRMPA as a statutory authority means that GBRMPA essentially operates as a single determining authority and one-stop-shop for commercial tourism operations in the Great Barrier Reef. This model which allows for zoning, planning and approval of the entire Park as a destination provides a streamlined process for tourism investors.

Secondly, as a statutory authority established by legislation, the Authority has a degree of independence from the Minister. This structure allows the GBRMPA to act in a manner similar to that of a commercial entity, allowing a proactive and responsive approach to core GBRMPA operations.

The third critical success factor of the GBRMPA is culture. Much of GBRMPA's success is attributed to a mindset that is open to working towards shared goals. It is not typical for a Government authority to build relationships with the private sector, but the GBRMPA has put considerable time and effort into understanding the importance of this to the park's future. The GBRMPA have employed a wide variety of people who have experience in the tourism industry, people who understand the issues from a private operator's perspective, which has assisted in creating a culture of open-mindedness and empathy within the GBRMPA.

### **Conservation Benefits**

The quality of partnership activities with the tourism industry has been critical in motivating and supporting the industry to work towards conservation goals. Programs such as BleachWatch, where operators provide comprehensive reports to map the extent and intensity of coral bleaching provide invaluable information to support the conservation agenda.

In addition to their work with tourism operators, the GBRMPA educate tourists about conservation values through interpretive activities provided by operators. Operators are trained in reef ecology through workshops, newsletters and fact sheets.

Each tourist visiting the Marine Park contributes financially to conservation and management by paying an Environmental Management Charge collected by tourism operators on behalf of the GBRMPA. Funds raised by this charge contribute to all aspects of managing the park, including conservation and research.

The GBRMPA is also one of a number of agencies involved in identifying threats and co-ordinating and facilitating conservation programs for threatened species.



## Case Study 6:

### Landbank

#### Reducing Barriers to Investment in Western Australia



In 2005 Tourism Western Australia established the Landbank initiative to ensure an adequate supply of tourism development sites would be available to meet the State's future tourism needs.

The primary aim of Landbank is to identify potential development sites and make them 'investor ready' by streamlining the approvals process, thereby making it easier for the right developer with the right development philosophy to invest in accommodation projects in the State. These developments may vary from luxury resorts to caravan parks or wilderness lodges, depending on what is appropriate for the location.

In the initial stages of the Landbank initiative, Tourism Western Australia and the Department of Environment and Conservation together identified six sites in and around national parks where environmentally sensitive development may be suitable. The aim was to facilitate the release of 20 sites state-wide by 2010. In total the Landbank initiative will involve 25 million hectares of protected areas and 98 parks.

The initiative is funded by the Western Australian Government and currently receives no Commonwealth support.

#### Business Model

Consultation with the investment community raised the issue of being able to develop land unencumbered as an incentive to invest. Lengthy development application processes and dealing with a multitude of government agencies was creating a barrier to investment.

In response, Tourism Western Australia and the Department of Environment and Conservation employed a rigor-

ous and systematic process to identify those particular sites worthy of development and seek ways to remove these barriers for the mutual benefit of all stakeholders.

The process aimed to streamline processes, minimise delays and improve communication between the investment community and all levels of Government.

#### Partnership Arrangements

Tourism Western Australia is working with several government agencies, local government authorities and developers to:

- Identify potential tourism development sites across the State.
- Accelerate the release of investor-ready land in strategic locations.
- Remove uncertainty and the time taken for developers to commence construction on tourism zoned sites.
- Safeguard the environment by ensuring any developments are in keeping with the location's environmental values and that relevant environmental approvals are obtained.

The agency is also working to attract suitable investors to tourism development projects through an Investment Attraction Strategy. This initiative promotes tourism development projects to a database of potential tourism developers and investors in Australia and overseas. A newsletter for premium investors outlining development opportunities and news is also published regularly.

Development and investment support provided by Tourism Western Australia includes cross-government introductions to facilitate fast-tracking of projects through

the approvals process when a number of government agencies are involved. The agency will highlight issues that need addressing and arrange introductions to those agencies such as meetings with providers of water, power and telecommunications.

Tourism Western Australia can provide support for a project where local government support is required for a tourism project to proceed to the approval stage. This may include introductions with representatives from the:

- Department for Planning and Infrastructure (which considers how a development complies with planning schemes, strategies and regulations and impacts on services such as power and water).
- Department of Racing, Gaming and Liquor (which provides liquor licences).
- Department of Environmental Protection (which considers the impacts of developments on the environment).
- Local Governments (which consider a broader range of issues including community concerns, compliance with local regulations and the impact of the development on surrounding landholders).

#### **Tourism Planning Taskforce**

In January 2006, the State Government endorsed the implementation of the most significant reform of tourism planning in Western Australia.

This followed the establishment of a Ministerial Taskforce by the Minister for Planning and Infrastructure four years earlier, to examine the impact of combining tourist and permanent residential accommodation on tourist zoned land and the strata titling of tourist developments.

The Tourism Planning Taskforce Report has important implications for local government, particularly those with a considerable tourism focus and tourism developers. The Department for Planning and Infrastructure and Tourism WA are responsible for implementing the report.

#### **Success Factors**

The Western Australian Government has committed over A\$1 million in funding to the initiative.

In making sites investor ready, close working partnerships were developed with the land owner, in this case the Department of Environment and Conservation. Tourism Western Australia has a Memorandum of Understanding with the Department of Environment and Conservation.

Tourism WA is also closely involved in any selection processes when opportunities are presented to the marketplace through a tendering process and will normally sit on the evaluation panel that decides the final outcome.

Despite some encumbrances, the Western Australian

Government has managed to move forward with this initiative to encourage sustainable environmental and economic development for the State.

#### **Barriers to Success**

Tenure is still an issue to be addressed. The Western Australian *Conservation and Land Management Act 1984* allows 21 plus 21 year leases. Restricted licences are permitted on a five plus five year basis.

#### **Conservation Benefits**

Landbank is not about cutting corners in developing tourism projects. Feasibility studies, environmental analyses, due processes, and extensive consultations are conducted before any development proposals are approved.

Through appropriate and sustainable development in the State's natural areas, additional revenue is generated to support the conservation initiatives and management of the parks.

#### **Partnership Opportunity**

Expressions of interest for the first Landbank site on Rottnest Island was released in 2006 seeking proposals for an accommodation facility which is sympathetic to the existing environment, infrastructure and ethos of the island.

Opportunities in other sites will be released in a phased program over the next five years. There are opportunities for Aboriginal communities to be equity partners in these developments, but there is currently a lack of initial capital and operational know-how on operating a facility.

#### **Conclusion**

The Landbank initiative is an excellent example of a whole-of-government approach to developing nature-based tourism. By listening to the needs of investors and assessing the economic needs of the State, the Government has found a solution which meets the needs of all parties. It involves both the tourism and conservation agencies working together under a MOU.

Conservation objectives are met by ensuring developments are appropriate and sustainable to the natural areas they reside in and that financial returns aid the ongoing management of the parks. The future needs of the tourism industry, and thus the economic and social development of the State, are being planned effectively. The needs of the investment community are being addressed and efforts made to assist in streamlining processes resulting in more cost-effective planning and an incentive to invest.

The Landbank initiative is also about adding value to the customer experience and engaging other areas of the community that have been absent in the investment profile, particularly Aboriginal Australia.

## Leases and Licences

Parks legislation may provide for a regime of leases, licences, agreements, franchises, concessions and permits. These are the legal mechanism to grant approval and rights for use and activities in a park. These approvals are granted by park agencies to achieve their visitation and recreation management objectives and to gain revenue.

Leases are typically used for an exclusive occupation of land (involving an interest in land or property). They provide a secure basis for investment in a new development or adaptive reuse of an existing building for a fixed term. Ownership of any fixed property developments and assets on the land return to the crown at the end of the lease. This is one reason why private sector operators may want to invest in demountable structures.

Licences (including permits, franchises and concessions) are simply an approval to use a park for a specific purpose that would otherwise not be permissible. Park legislation (and particularly regulations) typically list a wide range of activities from filming rights to collecting flora and conducting commercial tours. Generally there is also blanket requirement for a licence to conduct any commercial activity. Each type of activity may have specific restrictions. A licence usually confers a right to enter, occupy or use a park on a non-exclusive basis but does not provide an interest in land.

Agreements for commercial activity are effectively a commercial contract between an operator and the park agency. The agreement may be the legal mechanism to grant approval for an activity or be an attachment to an approval granted by Permit.

Parks legislation can impose blanket restrictions on granting leases and licences that have a significant impact on NTP viability. These restrictions can include the purpose, maximum land size, maximum length, renewal options, termination provisions and ability to on-sell leases and licences. Prevailing Government or park agency policy often imposes further blanket restrictions. One-size-fits-all restrictions such as maximum lease length may mean an NTP is not viable and the only avenue may be to amend legislation (see Appendix A3.3 Victorian System).

Lease tenure restrictions vary considerably from one system to another (see Table 1). Victoria for example has very specific (and short) lease tenures, although this will be reviewed under the Victorian Nature-Based Tourism Strategy 2007-2011. New South Wales has no limits specified and the policy is to assess lease tenure on the basis of the capital investment in the site. That said, leases of over 20 years are rarely granted and leases of over 50 years are not envisaged.

### Recommended Action



***Review maximum lease and licence limits in park legislation and implement a policy of granting tenure based on the Natural Tourism 'Partnership Criteria', including risk, capital invested and viable returns for private sector and park agency partners.***

An additional difficulty is that an NTP may need multiple lease and licence approvals for a range of visitor experience activities. A lease will provide approval for activities on the leased site but additional licences may be required for activities elsewhere in the park. This would require investor confidence over multiple approvals and effectively the security of tenure from an investment perspective is limited to the period of the licence with the shortest length.

Granting of approval is a critical tool for the park agency to manage parks and achieve their objectives. The actual legal approval mechanisms of leases and licences however, tend to establish landlord-tenant and authority-applicant relationships rather than true partnerships.

Finally, the private sector and park agency must negotiate the commercial terms of the lease or agreement to determine the value of financial (or in kind) contribution to the park agency in return for rights (and restrictions) to operate in the park. Given the high initial investment costs of power, water, sewerage, roads and building in remote park areas, reaching agreement on the commercial returns can be a significant barrier to NTPs.

The cumulative impact of the management objectives, PoM, assessment, one-size-fits-all restrictions and commercial negotiations will be expressed in the actual terms of the Lease or Licence.

### Recommended Action



***Revise park regulation to enable Natural Tourism 'Partnership Agreements', with broader scope than current lease and licence arrangements and allow for partnerships which have shared tourism and conservation objectives and shared risks and returns on revenue and tenure.***

## Funding and Financial Mechanisms

Legislation and regulations provide the legal authority for park agencies to raise revenue from park usage such as entrance fees, parking fees, filming rights and leases and licences. Typically regulations fix the fees for visitor entrance and certain licences and permits, while lease financial terms are determined by tender and commercial negotiations. Prevailing government policy means that visitor entrance fees are not levied in some systems such as Queensland.

### Recommended Action

**Apply park visitor entrance, parking, camping and usage fees in all park systems.**



Summer bushwalking,  
Mt Buller

Photo:  
Matt Darby  
Courtesy of  
Mt Buller Ski Resorts



Revenue raised from park usage can be returned to the Government's consolidated revenue fund. However, the enabling legislation may provide a mechanism for the revenue to be returned to the park system through a dedicated fund. Through this hypothecation, tourism and the private sector can make a direct economic contribution to the parks system.

*"The value of hypothecation is that it taps entrepreneurial motivation in managers and local communities. It allows the big-cost parks with heavy visitor use to pay their way and release limited agency funds to areas without a revenue earning potential. It taps revenue that would not otherwise be pursued and allows re-investment in facilities and services where it is most needed. This in*

*turn expands the tourism product, which attracts more visitors, which earns more revenue to reinvest. It sets up a cycle to fund parks."* - Senior Park Agency Manager

These dedicated park and wildlife funds do not guarantee that the revenue raised in a park will be returned to that particular park. Nor does this hypothecation guarantee that Governments will not offset revenue raised with reduced direct budget contributions to the parks fund.

### Recommended Action

**Provide full hypothecation (without budget offsets) to Park Agencies of all park visitor fees, fees from commercial tourism activities and returns from Natural Tourism Partnerships.**



## Forests and other Reserved Crown Land Legislation

In addition to parks legislation each State and Territory has legislation for other crown land which is reserved for specific purposes such as forests. Parks can be bordered by reserved crown land or freehold land. This adjacent land may be a tourism destination in its own right or a potential NTP site near a park destination.

These crown land reserves may have a less restrictive regulatory environment for tourism operations than parks. Freehold land also has the obvious advantage of tenure security for the investor. Using this nearby land for NTPs may also be more palatable to the local community.

The disadvantage of using land adjacent to parks is that another determining authority such as Local Government will be involved, given that the tourism operator may still need a licence approval from the park agency for any related commercial activity in the park. Suitable access or easements into the park would incur the same problems as a lease. The reserved crown or freehold land adjacent to parks would also still need to have natural appeal, proximity and access to the park to be a viable operation.

Table 2 provides a summary and comparison of approval requirements for Natural Tourism Partnerships in Parks or on crown land or freehold land adjacent to Parks.

**Table 2 - Planning, Assessment & Approval Requirements**

This table summarises the requirements for NTPs which need an interest over land in (or near) a park destination e.g. a resort, as well as permission to conduct a tourism activity in the park e.g. a boat tour.

Park Areas	Other Reserved Crown Land	Freehold Land
<b>Categories and Management Objectives</b>		
Consistent with Management Objectives for the category / classification of park.  OR  Otherwise permissible in legislation.	Consistent with purpose of reservation of crown land.  OR  Otherwise permissible in legislation.	Consistent with state, regional and local zoning.
<b>Plans of Management (PoM)</b>		
Consistent with PoM for individual park.  AND  Consistent with state / local planning under park agency policy or where required by legislation.	Consistent with PoM for individual reserve.  AND / OR  Consistent with state / local planning under government policy or where required by legislation.	Consistent with state, regional and local planning instruments for freehold site.
<b>Assessment and Approval</b>		
Environmental and/or heritage assessment by park agency as determining authority under parks legislation and/or state planning and assessment legislation.  AND / OR  Environmental and/or heritage assessment by another determining authority e.g. local government / heritage authority, where required by policy or legislation.  AND  Assessment and approval under Commonwealth authority if activity impacts on a matter of national environmental significance e.g. world heritage area.	Environmental and/or heritage assessment by authority under relevant crown land legislation and/or state planning and assessment legislation. Provides for input by the park agency of the adjacent park.  AND / OR  Environmental and/or heritage assessment by another determining authority e.g. local government / heritage authority, where required by policy or legislation.  AND  Assessment and approval under Commonwealth authority if activity impacts on a matter of national environmental significance.	Environmental and/or heritage assessment by local and / or other government determining authority under state planning and assessment legislation. Provides for input by the park agency of the adjacent park.  AND  Assessment and approval under Commonwealth authority if activity impacts on a matter of national environmental significance e.g. world heritage area.
<b>Lease, Licences, Permits and Agreements</b>		
Meets any blanket length or other lease restrictions under Parks legislation or park agency policy.  AND  Meets park legislative and policy requirements for permits by the park agency for related on park activity outside terms of lease.  AND  Agreement reached on commercial and other terms of lease & permits.	Meets any blanket length or other lease restrictions under relevant crown land legislation or policy.  AND  Meets park legislative and policy requirements for permits from the park agency for related on park activity.  AND  Agreement reached on commercial and other terms of lease & permits.	No lease required.  AND  Meets park legislative and policy requirements for permits from the park agency for related on park activity.  AND  Agreement reached on commercial and other terms of lease & permits.



## 8: Marketing Parks and Natural Tourism

TTF Australia's 2004 report, *A Natural Partnership: Making National Parks a Tourism Priority*<sup>23</sup>, examined the marketing and promotion of national parks and identified ways in which the tourism industry, tourism agencies and park agencies could work together to promote protected areas more effectively. This action plan aims to build on those earlier recommendations.

### 8.1 Key Issues in Marketing Parks Tourism

There has been considerable progress made by tourism agencies and park agencies working together to promote parks. However, there still exists great potential to market Australia's national parks and protected areas more effectively. Key issues in marketing natural tourism include:

- Lack of market research on park visitor preferences and profile.
- Increasing competition for consumer expenditure.
- Poor co-ordination of marketing efforts.
- Poor market recognition for particular parks and natural-tourism destinations within Australia.
- Consumer demand for responsible tourism, education, interpretation and minimal impact information.
- Lack of effective marketing tools such as online information dissemination and park passes.

*"One of the key issues in developing partnerships between the parks sector and tourism in relation to tourism marketing is getting parks managers/agencies to embrace the idea of marketing as being more than creating a brochure, but a marketing approach that is more targeted and broad. Co-operation, co-ordination, common branding (domestic and international), distribution channels, new markets and a focus on experiences (not products) and destinations are needed. Park marketing is generally atrocious. Tourism and marketing expertise needs to be better applied to protected areas."*  
– TTF Forum participant.

#### Market Research

Effective marketing must be underpinned by effective research in order that informed decisions can be made and marketing strategies developed. A review of available literature shows quantitative data on park visitation in Australia is poor and qualitative research on visitor needs and consumer behaviour is limited.

From discussions with the investment community and tourism industry stakeholders, TTF Australia has identified that further research is required on: visitor needs in national parks, demand for services and access, sustainable capacities, use of resources and the tourism potential of these assets, to inform investment planning decisions and marketing strategies.

#### Recommended Action



***Undertake further market research on natural tourism consumer demand, park visitor profile, consumer preferences and park brand recognition.***

#### Increased Competition for Consumers

There is widespread concern within tourism agencies and the industry over increasing international competition affecting both international and domestic tourism markets.

Australia's international competitive advantage, expressed through Brand Australia, relies strongly on our unique natural tourism offerings. Our main international competitors in natural tourism are Canada, the United States of America, South Africa and New Zealand. Marketing of natural tourism by these competitors is effective and considered by many to be superior to Australia's.

*"New Zealanders wouldn't stand being denied access to their national parks. They have worked out the link between tourism and natural resources and you know their advertising, their marketing of their natural tourism leaves ours for dead."* Warwick McInnes – Bovis Lend Lease

Innovation in our natural tourism product and improved marketing of these new experiences is essential to remaining a competitive destination.

However, recent literature shows that the challenge to both domestic and international Australian tourism lies not just with our international competitors but electronic and lifestyle consumer products competing for discretionary consumer expenditure. These products meet growing consumer demand for immediate gratification, a tangible product and peer group recognition.

Consumer behaviour is changing and both our tourism marketing and product development needs to change to remain relevant. To remain competitive, the marketing and product needs to provide:

- A unique experience that provides 'bragability' and positive peer group recognition for the consumer, rather than ubiquitous product offerings such as a hotel on a beach.
- Quick and easy access to these unique visitor experiences, rather than extensive time spent planning and navigating distribution systems.
- A tangible and immediate gratification at the time of expenditure, rather than relying solely on delayed gratification at the time of visitation.

In the context of park tourism, meeting these emerging consumer demands requires a focus on the overall visitor experience and developing branding strategies that evolve around a regional park destination's unique natural and cultural offerings.

This must be underpinned by destination planning to further develop new visitor experiences that compliment that unique offering and branding. Finally, destination marketing must provide easy access to information on visitor experience offerings in regional park destinations and provide immediate and tangible rewards to the park visitor.

#### Greater Co-ordination of Marketing Efforts

From an international tourist's perspective, there is an issue with parks being marketed and information being distributed through different State, Territory and Commonwealth agencies. The average international tourist does not have a strong awareness of the various names of the states and territories or names of most parks let alone department names of government agencies that produce and disseminate information about parks.

Indigenous visitor experiences,  
Red Centre Dreaming,  
Aboriginal music

Photo:  
John Henshall  
Courtesy of Tourism NT



The multi-level system of administration for national parks presents particular complications for visitors intending to travel to several states during one trip as the parks information and dispersal and promotion system is not easily navigated by prospective tourists.

#### World Heritage Branding and Marketing

World Heritage status is considered a valuable international brand in the tourism market. The brand appeal is such that a niche market exists for international visitors who 'collect' World Heritage experiences. Australia's 17 listed World Heritage areas are protected areas and include many of our most recognisable tourism icons. Our World Heritage Areas are:

1. Heard and McDonald Islands
2. Macquarie Island
3. Tasmanian Wilderness
4. Australian Fossil Mammal Sites (Naracoorte and Riversleigh)
5. Lord Howe Island
6. Central Eastern Rainforests
7. Willandra
8. Shark Bay
9. Uluru Kata Tjuta National Park
10. Kakadu National Park
11. Fraser Island
12. Wet Tropics of Queensland
13. Great Barrier Reef
14. Greater Blue Mountains Area
15. Purnululu National Park
16. Royal Exhibition Building and Carlton Gardens
17. Sydney Opera House

To capitalise on the World Heritage brand value, Tourism Australia (in conjunction with state and territory tourism agencies) is currently implementing a strategy to promote our World Heritage areas to the Japanese market.

World Heritage areas have unique values, making for compelling visitor experiences in their regional destinations, and are potential National Landscapes such as Uluru Kata Tjuta National Park in "The Red Centre" landscape.

#### Park Destination Branding and Marketing

Investors and operators believe that natural tourism has a greater chance of success if the regional park destination is promoted as a whole, and with a focus on the visitor experience, rather than marketing a specific product.

*"Most of these [nature-based tourism] projects are only successful when the destination is promoted as a whole rather than one aspect." John Simmonds, Stella Group*

Brand Kakadu (see Case Study 7) and the subsequent National Landscapes initiative (see Case Study 8) provide a good example of branding strategies to identifying a unique and sustainable visitor experience across a regional park destination.



## Case Study 7:

### Brand Kakadu

#### Branding & marketing the visitor experience

Kakadu National Park is one of Australia's greatest tourism and community assets. It is classified as a World Heritage site for both its cultural values and its natural significance. Kakadu comprises 20,000 square kilometres of coastal fringes, wetlands, woodland plains, rainforest, rolling hill country and elevated rocky outliners, bordered by the Arnhem Land tablelands to the east.

Kakadu is jointly managed by tribal elders representing the Traditional Owners and the Australian Government through the Kakadu Board of Management. In 2005, an analysis of Kakadu was undertaken to address issues regarding the brand values of the area and define the experiences available for visitors. The results were tabled in the report: "Walking to the Future Together: A Shared Vision for Tourism in Kakadu National Park"

The report recommended the development of a Tourism Master Plan for Kakadu, to be overseen by the Board of Management in consultation with the traditional owners, as well the development and promotion of a strong and consistent brand for Kakadu in order to refocus the perception and image of the park.

In consultation with key stakeholders, including the traditional owners, Parks Australia, the Northern Territory Government and the tourism industry, a new brand was developed to define Kakadu.

The resulting Kakadu brand strategy promises enormous benefits for tourism, conservation, the local community and traditional owners. The Kakadu Brand Strategy provides a platform which guides the entire tourism experience.

The Brand Strategy seeks to invite visitors who will respect and protect Kakadu's culture and environment.

The strategy facilitates the development of:

- Visitor experiences that provide insights into contemporary and traditional Aboriginal culture.
- Visitor experiences that teach the World Heritage values of Kakadu's cultural and natural heritage.
- Infrastructure and services that deliver the brand promise.
- Promotion of visitor experiences throughout Kakadu's six seasons.
- Visitor experiences that encourage lengthened stays and increased average spend.
- The Kakadu logo and marketing livery.

Brand Kakadu embodies more than tourism and marketing. It reaches into many facets of Kakadu. It is about the longevity and sustainability of a culture, environment and lifestyle and shows how areas such as business development, education, infrastructure and park management all benefit by embracing the principles of the brand.

Brand Kakadu provides the focus, clarifies objectives and helps prioritise tasks or projects. The brand shapes attitudes and provides a clear choice when making decisions. It provides a vision and assists in developing the right experience so that the visitor expectation of Kakadu is delivered.

Brand Kakadu endeavours to conceptually take down the borders of the National Park, opening up the region as a national landscape, and providing the visitor with a greater depth of experiences as a whole. It serves as a model for marketing significant landscapes as well as national parks in general based on experience borders as opposed to geographic boundaries.

## Case Study 8:

### National Landscapes

**A marketing partnership between conservation and tourism**



The National Landscapes Initiative, launched in 2006, is a partnership between the tourism and conservation management sectors that aims to capture and promote the best of Australia's natural assets.

Tourism Australia and Parks Australia have formed a partnership to identify landscapes which capture the essence of Australia and offer distinctive natural and cultural experiences, with a view to branding and marketing these areas according to the unique experience each one offers to the traveller.

The definition of a 'National Landscape' under the initiative is an area that transcends individual national parks, iconic tourist attractions and State and regional boundaries. Instead the landscape is united by its unique visitor experiences, topography and significant environment or cultural values.

Each landscape must meet certain criteria for selection including: the capacity to be a major drawcard for domestic and international visitors, have an existing or proposed management arrangement which ensures the appropriate development of sustainable tourism services to benefit regional economies, have the capacity to respond to or stimulate consumer demand, the potential for iconic imagery and the capacity to cater for manageable levels of visitor access without negative environmental or cultural impacts.

In identifying these landscapes, the aim is to encourage regional planning, including the appropriate development

of access and infrastructure consistent with natural and cultural conservation outcomes.

The program also aims to enhance the value of tourism to the regional economy and the role of managed protected areas in that economy. It will complement existing State and Territory programs and facilitate tourism planning and strategy.

Essential to the success of this initiative is long-term planning that brings together the key players to deliver both tourism and conservation outcomes. The project committee currently includes several government agencies including Tourism Australia, Parks Australia, the Department of Industry, Tourism and Resources, as well as representatives from the key Australian tourism, ecotourism, academic and conservation sectors.

The first step for an identified National Landscape will be destination branding consistent with the framework of Brand Australia to identify those experiences unique to that landscape. Planning will then focus on the necessary facilities that are needed to deliver a quality visitor experience.

The Red Centre has been identified as the first National Landscape. The project committee will continue to work through key selection criteria and a selection process to choose future areas to be marketed as National Landscapes. The National Landscapes project was inspired by the development of Brand Kakadu and draws on that experience.



## Recommended Actions



*Fund and develop branding strategies for park destinations using the 'National Landscapes' initiative.*

*Using the 'National Landscapes' initiative, fund and develop regional park destination master plans for sustainable natural tourism visitor infrastructure and experiences, based on the brand strategy.*

*Implement a co-ordinated international and domestic marketing strategy for natural tourism and park visitor experiences through Brand Australia and 'National Landscape' brand park destinations.*

### Responsible Tourism

Another changing consumer behaviour is the demand for responsible tourism. Consumers are increasingly aware of the need for low impact tourism which does not harm the environment. The growth of interest, investment and development of sustainable tourism and ecotourism is a response to such concerns.

Parks are well placed to take advantage of this trend as they embody the values that such travellers hold. Some tourists are attracted to destinations that have a positive reputation, and are actively avoiding destinations that have social or environmental problems. It is important that managers work to preserve protected area values, seek high standards from their tourism partners, and so help ensure that the appeal of the area to visitors is maintained.

Environmental concerns and issues have received heightened awareness amongst consumers in recent years. The high level of media and government attention given to the phenomena of global warming and climate change is one factor that has accelerated this awareness. International perception of Australia's response to climate change could have a negative impact on Brand Australia. For example, the depletion of water levels in Australia's rivers has been a major story in United Kingdom papers in recent months.

Over the past few years the tourism industry worldwide has seen a growing consumer demand for 'responsible travel', defined as: travel which minimises negative environmental, social and cultural impacts, enhances the well-being and

economic benefits of host communities and local people and contributes to the conservation of natural and cultural heritage. Accreditation schemes to brand and market certified responsible travel products have emerged to provide consumer information and choice on reputable nature tourism products (see Case Study 9: Ecotourism Australia ECO Certification Program).

Australia is well positioned in a marketing sense to promote itself as a responsible tourism destination, but has not co-ordinated this positioning nationally. Critical to success in meeting consumer demand for responsible tourism is the effective dissemination of information on low impact travel and effective branding of eco-tourism and responsible tourism accreditation schemes.



## Recommended Action

*Implement a co-ordinated international and domestic marketing strategy for natural tourism and park visitor experiences through Brand Australia and 'National Landscape' brand park destinations.*

### Online Marketing and Information

Research by Tourism Australia<sup>24</sup> shows that park visitors are significant users of the internet to access parks tourism information.

*"National park visitors are more vigilant information seekers than average travellers, relying on the internet, travel books and travel agents to source their research – they are information hungry." Paul Fairweather, Tourism Research Australia*

An attempt at consolidating parks tourism information online has been made by the Australian Tourism Net ([www.atn.com.au/parks/parks.htm](http://www.atn.com.au/parks/parks.htm)) and others ([www.australiannationalparks.com](http://www.australiannationalparks.com)) but a review of these websites found that the information was not as comprehensive or as easy to navigate as international examples.

The Australian Government website only has information about national parks and marine protected areas under Commonwealth jurisdiction. A search on Tourism Australia's website for 'national parks' yielded over 4000 results and was not easy to navigate. Essentially Australia has no single website portal for the international (or domestic) tourist to access parks.

Accessing Australian parks online is largely a matter of finding the relevant State Government website then



## Case Study 9:

### Ecotourism Australia ECO Certification Program



ECO Certification has been developed for industry to identify genuine nature tourism and ecotourism products which have a minimal impact and offer experiences in Australia's natural areas.

Tourism operations seeking ECO Certification undergo a rigorous assessment by an independent trained assessor and must provide referees including a protected area manager. The credibility of the ECO Certification

Program is maintained through:

- Review and updating of criteria every three years to reflect emerging best practice.
- Feedback from customers of accredited operators.
- Regular Audits of operators, including an on-site audit on the entire Eco Certification criteria.

There are three levels of certification depending on the visitor experience and product offering:

**Nature Tourism:** Tourism in a natural area that leaves minimal impact on the environment.

**Ecotourism:** Tourism in a natural area that offers ways to learn about the environment with an operator that uses resources wisely, contributes to the conservation of the environment and helps local communities.

**Advanced Ecotourism:** Tourism products which provide an opportunity to learn about the environment with an operator who is committed to achieving best practice, contribute to the conservation of the environment and help local communities.

Nature tourism and ecotourism certification provides benefits to operators, park agencies, communities and visitors with a:

- Criteria to assist operators plan and develop their nature tourism and/or ecotourism product.
- Guide to assist operators implement the principles of ecologically sustainable development.
- Standard recognised as best practice for operators to continually improve performance.
- Brand for visitors to identify genuine nature tourism and ecotourism operators.
- Tool for park agencies to encourage improved practices that lead to less environmental impact.
- Tool for communities to determine tourism which maximise benefits and minimises impacts.
- Certification enabling Travel Wholesalers and Inbound Tour Operators to identify sound choices of sustainable tourism operators to use in Australia.

selecting a particular park. Some of these websites allow you to search for walking trails or camping sites across parks (but only within the state). These websites typically do not provide the potential park visitor with access across parks to:

- Natural tourism visitor experiences such as diving, caving, bird watching or other experiences in parks that would appeal to niche markets.
- Easy 'packages' or independent journeys to experience the park and destination.
- Private sector visitor experiences and tourism operations within parks.
- Visitor experiences and unique offerings in the regional park destination outside the parks borders.

There is a need for consistent themes to be developed that combine environment, heritage and tourism messages and for these themes to be delivered from a demand perspective to ensure the needs of visitors are being effectively met.

A more co-ordinated national approach to marketing and single point of entry for information on Australia's national parks and protected areas, such as those provided by the Canadian Parks website example, should be considered.

## Recommended Action



*As key marketing tools, develop a single website portal to access park visitor experiences across Australia and a national 'AusParks' entry pass to Australian parks.*

## Park Passes

Most park agencies offer a range of park passes which provide savings to frequent visitors. Passes can be for multiple visits to either a single or multiple parks and for a range of durations. Multiple park passes may include all parks within the system, listed parks or exclude specific (high fee) parks.

Park System	Annual Cost
Tasmania	\$60-\$84
South Australia	\$63
Victoria	\$69.20
New South Wales	\$65
Western Australia	\$75



The Desert Park Pass is a pack of valuable information and maps that will ensure you get the most from your visit to the SA outback. The pack contains: your annual permit (windscreen sticker), the Desert Parks Handbook and 3 maps covering Western, Eastern and Outback South Australia.

The Simpson Desert  
Photo: Jon Armstrong Courtesy of South Australian Tourism Commission

The annual passes are limited to parks in the state system and are squarely aimed at frequent visitors in the domestic market. Passes are not generally used as part of a comprehensive branding or marketing strategy. The South Australian Desert Parks Pass however, is a good example of a pass strongly connected to a destination branding strategy, well targeted to a specific market and designed to enhance the 4WD outback travel experience.

An Australian wide parks pass could be an effective branding and marketing tool. An 'AusParks' pass could be targeted to the international tourism market and to increase dispersal, length of stay and revenue for parks.

More than an incentive for multiple visits, an 'AusParks' pass would need to be strongly integrated with Brand Australia and promote visitor experiences in regional park destinations. An 'AusParks' pass, purchased on-line, could potentially provide immediate, tangible, experiential and responsible travel rewards to the consumer through:

- Immediate online access to guides on selected 'National Landscape' regional park destinations.
- Immediate access to a selection of online audio downloads and guides on park visitor experiences such as trails, caving, diving, etc.
- A tangible pass for free entry to parks and discounts in the regional park destinations.
- Responsible travel through funding parks, guides to visitor impact and potentially a contribution to a carbon off-set contribution.
- Discounted travel packages.

An annual 'AusParks' would provide an incentive to visit multiple regional park destinations and to extend duration of travel to achieve the value of the pass and 'collect' visitor experiences. The pass could also provide opportunities for collaborative marketing such as promoting eco-accreditation branding and discounts to pass holders for participating tourism operators.

## Case Study 10:

### North American Park Websites

#### Parks Canada Website

The Parks Canada website provides a single point of entry for information on all of Canada's national parks across all provinces. It is administered by the Parks Canada National Office.

It contains a list of all of Canada's national parks in alphabetical order as well as a list of Canadian national parks by province and park-by-park information on activities, guidelines, fees, and the surrounding region to enable prospective visitors to plan their visit. The website also contains messages on sustainable tourism and impact minimisation for tourists.

See [www.pc.gc.ca](http://www.pc.gc.ca)

#### US National Parks Website

Provides a central portal for all national parks in the US with comprehensive details on each park such as location and how to get there (including public transport), ranger activities, hiking/climbing/biking options, history, scientific background, disabled access. The site is easy to navigate with clear explanations.

See [www.nps.gov](http://www.nps.gov)

#### Marketing as a Visitor Management Tool

In a number of States, the tourism marketing and parks management agencies have formed alliances to work towards sustainable park tourism (see Case Study 4: Tourism in Protected Areas Initiative). Integral to these marketing approaches are:

- The monitoring and management of visitor demand to prevent negative impacts and ensuring the carrying capacity of the environment is sustainable.
- 'De-marketing' techniques to manage visitor demand.
- Strategies that increase visitation in the off season to ensure stability in employment.
- More sophisticated marketing to provide better returns for park agencies and investors.

In parks tourism marketing is not just a demand driver but a key visitor management tool for park agencies.

#### Recommended Action



*Provide separate dedicated park agency budget funding for visitor management and visitor infrastructure which matches increases in park visitation.*

## 9. Global Warming, Parks and Tourism

### Global warming

Global warming has become an accepted fact by governments, the private sector and general public around the world. While research and debate continues on the precise impact of climate change, there is little public doubt that global warming will effect our natural environment.

As custodians of over 10% of Australia's land mass and much of our marine areas, park agencies face a major challenge in adapting to climate change and conserving bio-diversity and natural values of our parks and protected areas.

Tourism is also extremely vulnerable to the impact of global warming due to the effect on our core natural tourism product and to changing consumer perceptions. Reported effects of global warming on our parks, great tourism icons and natural landscapes include:

- A 2-3°C rise in global temperature could see 97% of the Great Barrier Reef bleached, affecting a \$1.5 billion industry and 48,000 jobs in north Queensland.
- A 2-3°C rise could see an 80% loss of the fresh water wetlands of Kakadu which sustain the Aboriginal owners and attracts more than 165,000 visitors each year.
- A 1°C rise in global temperature would reduce snow cover in our Alpine ski fields by up to 60%, placing about half of Australia's \$550 million ski industry at risk.
- Rising sea levels threaten beach resorts and tourism operations in coastal areas.
- Drought and bushfire diminish the appeal of our inland natural landscapes and would heavily impact on the dispersal of domestic tourism dollars to regional areas.

Tourism to our parks and natural attractions would suffer from the loss of habitat, wildlife and natural appeal. This would have a major impact on industry and particularly regional economies. For example, the financial value of visitors to the Kosciuszko National Park is worth at least \$640M per annum.<sup>25</sup> Bushwalking and nature appreciation accounts for more visitors than skiing.<sup>26</sup>

The net national increase in gross product due to the economic contribution of alpine resorts is \$638 million for the 2005 winter season alone.<sup>27</sup> A decline in alpine habitat and wildlife, together with a loss of snow cover, would have a dramatic impact on the regional economy of gateway towns such as Cooma.



Little Buller Spur,  
Mt Buller

Photo:  
Courtesy of  
Mt Buller Ski Resorts

Long before our parks and natural tourism products are affected by global warming, changes in consumer perceptions could have a negative impact on tourism jobs and export earnings. International perception that Australia has failed to act on climate change would undermine our branding investment and reputation as a natural tourism destination.

Similarly, consumer perception that long haul flights to Australia contribute to climate change could also have a major impact, particularly on the responsible travel market. For example, the Lonely Planet website tells potential tourists that a return trip between London and Sydney will generate 5.6 tonnes of CO<sub>2</sub> with an offset cost of \$102.

Potentially global warming could actually assist our international tourism competitors in northern latitudes such as Canada and Russia which would benefit longer summer peak seasons.

Considering the risk it is critical that the tourism industry takes action, and is perceived by consumers to be acting, on climate change.

### Climate Change Adaptation

The Council of Australian Governments (COAG) has identified that there is lack of planning in relation to climate change and its impact on both natural areas and the future of the tourism industry. Greater awareness and uptake of adaptive strategies and planning amongst tourism is needed to ensure the industry is ready to cope with changes.

A major barrier to climate change adaptation is the multitude of individual parks and their lack of 'connectivity'. Again a 'landscape' approach is needed to manage and connect multiple parks.

*"The National Parks Association of NSW noted that: Increasingly it is recognised that isolated reserves will not on their own safeguard our native biodiversity, particularly in light of growing threats due to climate*

*change, invasive species, and even large bushfires. It is important that reserves are connected to allow species migration and movement ... this will require a range of approaches from all land managers – public and private.”<sup>28</sup>*

Park agencies and the private sector must work together to acquire crown land (or reserve freehold land) to connect our parks and manage that land to adapt to climate change. Acquiring and protecting new land and marine areas through our National Reserve System is one of the most cost effective ways to protect biodiversity. Land repair programs can be up to 25 times more costly than acquiring and protecting intact areas<sup>29</sup>.

Existing Commonwealth and State government policy aims to increase the ‘comprehensiveness’ of protected area coverage to 80% of Australia’s ecological diversity by 2010-2015. However it is cited that an additional \$250 million over 5 years in Commonwealth funding is needed to reach this objective<sup>30</sup>.

Park agencies already face a funding crisis and the cost of climate change adaptation will be beyond their present means. Additional government funding is needed but the private sector (and the tourism industry in particular) can contribute through Natural Tourism Partnerships. These NTPs can not only fund park agency conservation through shared returns, but be used to reserve and manage land in the park system.

### Recommended Action



***Increase budget funding to Park Agencies for land acquisition, climate change adaptation and ongoing conservation of the increasing park estate.***

The tourism industry could also directly contribute to climate change adaptation, and consumer perception, through climate change and carbon-offset schemes.

#### **An Australian Tourism Climate Change Scheme**

The tourism industry could develop a self-regulated voluntary climate change adaptation and carbon-offset scheme in partnership with government, conservation groups and park agencies. An Australian tourism climate change scheme could:

- Provide a voluntary carbon offset scheme for use by the Australia tourism industry.

- Direct funding into re-growth of native trees as carbon traps on land which is permanently secured in our National Parks & Reserves System.
- Direct funds to acquire or reserve land in our National Reserve System to achieve ‘connectivity’ between parks, develop resilience to climate change and secure existing native tree carbon traps.
- Direct funds to adaptation strategies by park agencies such as the Great Barrier Reef Marine Park Authority and NSW Parks & Wildlife.
- Be linked to Brand Australia and responsible tourism marketing strategies to manage consumer perception.

Unlike other schemes, this scheme could ensure that carbon is truly captured into the future by permanently locking in land and trees to our national park estate. The scheme would assist park agencies to save our habitats and natural icons and invest in our Australian natural tourism assets. By pooling carbon offset funding across the industry, tourism can make a more visible contribution and protect our brand investment as a nature-based tourism destination.

### Recommended Action



***Increase budget funding to Park Agencies for land acquisition, climate change adaptation and ongoing conservation of the increasing park estate.***

## 10. Funding Park Conservation

Park agencies lack the funds to meet their conservation objectives. Parks are reliant on government funding which has remained steady (or declined), while the park estate has increased. Increasing the reserve system, climate change adaptation and the dilapidated state of park infrastructure all create rising costs for park agencies.

Nature-based and parks tourism clearly makes a major economic contribution to the nation (see Section 5.2: Consumer demand for parks tourism) but park agencies receive a minor share of these economic returns. Due to this basic externality, there is a valid role for government to adequately fund conservation and park visitor management commensurate with their economic value.



## Recommended Action



***Assess the findings of the upcoming Sustainable Tourism CRC research on the economic contribution of Australia's parks and evaluate increased budget funding for park agencies accordingly.***

Government should also adopt policies which enable park agencies to capture a greater share of tourism revenue through visitor use fees and Natural Tourism Partnerships.

Tourism can never replace government funding as the primary source of revenue for park agencies, but can make a major contribution to generating real increases in park funding. To achieve increases in park funding from tourism, governments must seek revenue from visitors and the commercial use of parks and allow for full hypothecation of this revenue to park agencies. To ensure these are real increases in park funding, government must undertake not to offset this revenue by decreasing government direct funding.

## Recommended Action



***Provide full hypothecation (without budget offsets) to Park Agencies of all park visitor fees, fees from commercial tourism activities and returns from Natural Tourism Partnerships.***

### Visitor Use Fees

Internationally, protected area entry fees provide a practical mechanism for raising tourism-based conservation revenue. However, many park systems lack incentives for park staff to rigorously collect, track, and account for entry fees. This occurs in countries where entry fees are deposited into the general government treasury rather than allocated back to the park system.

In order to ensure an effective financial stream for species conservation, revenue from protected area entry fees should be channelled as directly as possible back into the park to cover operational needs such as staff salaries and infrastructure.

When establishing a program of protected area entry fees, planners should consider a number of feasibility issues, such as the annual number and origin of tourists, the

biodiversity 'value' of the species or habitat, and the accessibility of the protected area.

In Australia, most park systems apply entrance, parking or camping fees for visitor use of popular parks. Fees are not necessarily applied to all parks in the system, as the cost of fee collection can be prohibitive in some circumstances. Park agencies report that domestic visitors are generally accepting of fees where they believe the money is returned to park conservation and that charging fees tends to increase visitors valuing of the park experience.



Visitor signage and interpretation, Registration Bay, Flinders Ranges, South Australia

Photo: Alex Makeyev  
Courtesy of South Australian Tourism Commission

By applying visitor use fees to all parks, where it is feasible to do so, parks agencies will be better funded to maintain critical park visitor infrastructure such as walking tracks, roadways, signage and amenities as well as establishing effective programs to protect or enhance conservation efforts.

## Recommended Action



***Apply park visitor entrance, parking, camping and usage fees in all park systems.***

### Natural Tourism Partnerships

Natural Tourism Partnerships can assist park conservation funding through a variety of means. First by improving visitor infrastructure, servicing and marketing, NTPs can attract park visitors paying entrance and usage fees. More fundamentally NTPs can deliver value-added park visitor experiences which consumers are demanding and are prepared to pay for. Through shared risk and returns NTPs can create real additional revenue streams for parks.

Bringing capital efficiency and expertise to building and operating visitor infrastructure and services, NTPs can also share the risks, improve the quality and reduce the cost to park agencies of delivering their park visitor management objective.

## Case Study 11:

### The Overland Track, Tasmania

**Funding conservation through improved visitor services and innovative park management.**



The Overland Track in Tasmania's Wilderness World Heritage Area attracts up to 9,000 bush walkers from Australia and overseas every year. The Tasmanian Department of Tourism, Arts and the Environment (DTAE) is responsible for the management of the track. Two years ago this iconic Australian walk was suffering under increasing pressure from bushwalkers and a range of social and environmental issues.

While park entry fees were collected, they were often allocated to priorities other than track maintenance or improvement. Given the iconic nature of the Overland Track and the need to improve the visitor experience it was decided to develop a new approach to the track's future management.

#### **Innovative solutions**

As a solution to this problem, DTAE implemented a new management strategy which included an online booking system; a facility fee; capping of daily visitor numbers; dedicated group campsites; and the requirement to walk only one way on the track.

The web-based booking system and A\$100 usage fee was a strategy to help manage visitor numbers as well as generate revenue specifically for the track, with 100% of the fee allocated directly to the track's maintenance and management. Although it does not completely cover the entire costs of operating and maintaining the track, the fee has generated approximately A\$1,000,000 since it was introduced in November 2005.

Prior to the new system being introduced, visitors just turned up and accommodation huts were used on a first-come first-served basis. The new processes also ensured better management of the track and facilities by controlling visitor numbers and usage.

The system has resulted in an improved visitor experience; additional revenue which is also used to employ more park staff during the busy season; and for further developing and improving the product.

Visitor survey results in 2005-06 showed significant improvements in the quality of visitor experiences. The research found the incidence and impact of crowding along the track had decreased considerably following the implementation of the new measures. There was also a significant improvement in the overall quality of the Overland Track experience, with a 91% satisfaction rating. In fact, following the introduction of the new management strategy, 39% of walkers who took part in the survey stated it was 'one of the best things I have done in my life'; up from 27% the previous year.

There have been no negative responses to the booking fee. Research conducted after the introduction of the fee indicated that some customers even felt the fee was too low.

Now that the Overland Track has been upgraded and is mostly self-funding its maintenance, the Tasmanian Government plans to further enhance the visitor experience, with the introduction of new board-walks and upgraded accommodation huts.

## Recommended Action



***Release park agency resources for conservation by utilising the private sector to deliver park visitor management and conservation services through Natural Tourism Partnerships.***

Corporate responsibility and sustainability are increasingly evident in many private sector company philosophies and the private sector can provide additional resources for the upkeep and maintenance of visitor facilities where these are not otherwise available. The private sector is also making efforts to achieve environmentally and social sustainable operations. For example, Voyages Hotels and Resorts launched their Community and Environment Report in 2004. This comprehensive report assesses the efforts of the company across its key properties in the areas of community and ecology. This report is an example for the tourism industry on a global level.

Another example is the environmental fund set up by the developers Baillie Lodges to support conservation projects on Kangaroo Island in South Australia (see Case Study 12: Tourism and Conservation Partnerships).

Through the introduction of user-pays fees and natural tourism partnerships, parks can generate revenue to cover many operating and maintenance costs. However, nature-based tourism is a competitive market and parks must offer high-quality environmental characteristics to be successful.

Governments should fund park conservation directly because it preserves the environment, bio-diversity and our cultural heritage for future generations of all Australians. However the cost of visitor infrastructure, services and management is created by those who use the park and it is only appropriate that visitors and the private sector contribute to park funding as well.

## Recommended Action



***Create Natural Tourism Partnerships between Federal and State/Territory Governments and the private sector to fund, develop and operate sustainable natural tourism visitor experiences and infrastructure which provide direct funding for park conservation and climate change adaptation.***

Hanson Bay, Kangaroo Island

Photo: Adam Bruzzone

Courtesy of South Australian Tourism Commission



## Case Study 12:

### Tourism and conservation partnerships

#### Southern Ocean Lodge, Kangaroo Island, South Australia

A fund to support environmental projects on Kangaroo Island will be set up in a joint initiative between the State Government and the developers of Southern Ocean Lodge, a nature-based tourism venture to be built near Hanson Bay, adjacent to the Flinders Chase National Park.

The Southern Ocean Lodge Development Fund will be partly funded by visitor tariffs and is expected to generate between \$20,000 and \$50,000 annually for local environment projects.

The South Australian Government approved the Southern Ocean Lodge project on 100 hectares of private land, provided the developers met a number of conditions, with one of those conditions being the establishment of the environmental fund. The funds will be used to support environmental projects to offset the clearance of native vegetation during the building of Southern Ocean Lodge.

An advisory board made up of representatives from the developers, Baillie Lodges, The Native Vegetation Council and the Department for Environment and Heritage will administer the fund. Projects under consideration include ongoing restoration and management of the native habitats and further research into the threatened plant and animal species on Kangaroo Island.

The Environment Fund sets a new benchmark for public/private collaboration in South Australia, and is a good example of the mutually beneficial alliance that can be achieved between tourism and conservation.

# 11. Recommended Natural Tourism Action Plan

## A National Action Plan

The following recommendations are designed to be a comprehensive national action plan. The recommendations seek to remove critical barriers and progress the co-ordination, branding, planning, development and marketing of park visitor experiences through public-private Natural Tourism Partnerships (NTPs) which will fund park conservation and visitor management.

## Key Recommendations

1. Progress a national Natural Tourism Action Plan.
2. Develop natural tourism destination branding and master planning.
3. Use Natural Tourism Partnerships to develop and operate sustainable visitor experiences.
4. Increase public and private funding of park conservation and infrastructure.
5. Remove regulatory barriers to Natural Tourism Partnerships.
6. Enhance natural tourism marketing.

### 1. Progress a national Natural Tourism Action Plan



Natural tourism needs a partnership approach from tourism investors and operators, the conservation sector and environment, park management and tourism departments and agencies at the Federal, State and Territory level.

A nationally co-ordinated Natural Tourism Action Plan could be progressed by a special session of Federal, State and Territory Tourism and Environment Ministers at an extended EPHC or TMC Ministerial Council meeting.

#### Recommended Action

***Convene a special meeting of Tourism & Environment Ministers to consider and progress this Natural Tourism Partnerships Action Plan and co-ordinate natural tourism policy initiatives.***

Strategic direction for a Natural Tourism Action Plan would be provided by a leadership group from park agencies, tourism agencies and national conservation and tourism bodies such as the Australian Conservation Foundation and TTF Australia. This leadership group could be an extension of the Heads of Parks and Tourism Agencies (HOPTA) committee.

#### Recommended Action

***Implement a Natural Tourism Advisory Group of senior representatives from park agencies, tourism agencies, conservation groups and tourism industry groups to advise Tourism & Environment Ministers on the strategic direction of this Natural Tourism Partnerships Action Plan.***

## 2. Develop natural tourism destination branding and master planning



Destinations with unique natural tourism attractions in local parks and the surrounding regional area should be identified and prioritised by Federal, State and Territory governments and conservation and tourism stakeholders.

### Recommended Action

*Target priority regional park destinations, as agreed by park agencies and tourism agencies, which meet the 'National Landscapes' criteria of providing a unique attraction and visitor experience.*

Federal, State and Territory governments can fund the development of a strategy to brand the unique natural tourism attractions in the destination's park and regional area.

### Recommended Action

*Fund and develop branding strategies for park destinations using the 'National Landscapes' initiative.*

An audit of existing access, infrastructure, facilities and tourism product will assess development needs in the destination's parks and regional area. A master plan can then identify Natural Tourism Partnership opportunities for infrastructure and visitor experiences which are consistent with the destination's brand.

### Recommended Action

*Using the 'National Landscapes' initiative, fund and develop regional park destination master plans for sustainable natural tourism visitor infrastructure and experiences, based on the brand strategy.*

## 3. Use Natural Tourism Partnerships to develop and operate sustainable visitor experiences



Natural Tourism Partnership opportunities identified in Master Plans should first undergo a pre-approval process such as Western Australia's Landbank initiative.

### Recommended Action

*Undertake an internal planning, environment assessment and pre-approval process by government for potential natural tourism visitor experience and infrastructure developments. Present the 'pre-approved' sustainable Natural Tourism Partnership opportunities to investors for competitive tender.*



These local Natural Tourism Partnership opportunities should be collated on a national register to attract the interest of the national investor market and maximise competitive tenders.

### Recommended Action

*Publicise a national register of potential natural tourism visitor experience and infrastructure developments which private sector investors can access and consider.*

Following 'pre-approval' and competitive tender, Natural Tourism Partnerships can be negotiated and approved between the private sector investor and a government one-stop-shop. This could be a special project team for a particular NTP. Alternatively, an existing government body for targeted development projects could be used, providing that the necessary park management expertise is incorporated.

### Recommended Action

*Constitute a 'one-stop-shop' of park, tourism and other government agencies for each potential Natural Tourism Partnership. The 'one-stop-shop' should be empowered to negotiate and approve all terms of a 'Partnership Agreement' with the private sector. Ensure the 'one-stop-shop' has commercial, conservation and marketing skills, and is authorised under all relevant State and Federal legislation.*

Using this approach Federal and State governments can enter into partnerships with the private sector to develop 'appropriate' enhanced visitor infrastructure and experiences in targeted regional park destinations, consistent with the unique natural attractions of that 'National Landscapes' brand. Natural Tourism Partnerships well designed through the pre-approval and one-stop-shop process will deliver shared returns to the investor and park agencies, which can fund park conservation.

### Recommended Action

*Create Natural Tourism Partnerships between Federal and State/Territory Governments and the private sector to fund, develop and operate sustainable natural tourism visitor experiences and infrastructure which provide direct funding for park conservation and climate change adaptation.*

## 4. Increase public and private funding of Park conservation and infrastructure



Park conservation and infrastructure funding and resources can be enhanced through visitor use fees, commercial activity fees, returns from NTPs, voluntary contributions to the environment by tourists and increased direct government funding. Visitors who use the enhanced park visitor infrastructure and experiences can contribute to their cost through reasonable usage fees. Usage fees can also be used to manage visitor impact.

### Recommended Action

*Apply park visitor entrance, parking, camping and usage fees in all park systems.*

Revenue from park tourism can only make a real contribution to park conservation, if the revenue is returned to park agencies. Returning revenue to parks assists in managing visitor impact and is an investment in our natural assets supported by the tourism industry and conservation sector.	<div>Recommended Action</div> <div><i>Provide full hypothecation (without budget offsets) to park agencies of all park visitor fees, fees from commercial tourism activities and returns from Natural Tourism Partnerships.</i></div>
Private sector capital and expertise can also be used to efficiently and effectively deliver visitor marketing, experiences and limited conservation services for park agencies. This directly contributes to local parks and releases park agency funds and expertise for their primary conservation objective.	<div>Recommended Action</div> <div><i>Release park agency resources for conservation by utilising the private sector to deliver park visitor management and conservation services through Natural Tourism Partnerships.</i></div>
Visitors could also make a voluntary contribution to parks through a scheme to directly fund parks efforts to mitigate and adapt to climate change. Such a scheme could also address consumer perceptions of Australia as a sustainable destination.	<div>Recommended Action</div> <div><i>Examine the feasibility of a voluntary industry Australian Tourism Climate Change scheme that would direct funding to the acquisition of park areas, native regrowth in park areas and climate change adaptation in park areas.</i></div>
An accurate and compelling assessment of the economic contribution of parks tourism, the economic costs of climate change, and the cost implications of climate change adaptation in parks could inform government spending decisions on park agency budgets.	<div>Recommended Actions</div> <div><i>Assess the findings of the upcoming Sustainable Tourism CRC research on the economic contribution of Australia's parks and evaluate increased budget funding for park agencies accordingly.</i></div> <div><i>Increase budget funding to park agencies for land acquisition, climate change adaptation and ongoing conservation of the increasing park estate.</i></div> <div><i>Provide separate dedicated park agency budget funding for visitor management and visitor infrastructure which matches increases in park visitation.</i></div>

## 5. Remove regulatory barriers to Natural Tourism Partnerships



To enable Natural Tourism Partnerships to be developed, legislative and regulatory and policy barriers should be reviewed.

This policy review should focus on barriers to Natural Tourism Partnerships identified in the Master Plans of the targeted regional park destinations.

### Recommended Actions

*Refocus policy away from 'one size fits all' restrictions on allowable activities in parks and assess natural tourism projects on a case by case basis using the 'Partnership Criteria'.*

*Enable Environment Ministers to legally classify targeted parks using the IUCN categories and manage those parks for conservation and tourism objectives.*

*Revise plans of management for targeted parks to allow for sustainable visitor experiences and infrastructure according to the park destination National Landscape Master Plan.*

*Review maximum lease and licence limits in park legislation and implement a policy of granting tenure based on the Natural Tourism 'Partnership Criteria', including risk, capital invested and viable returns for private sector and park agency partners.*

*Revise park regulation to enable Natural Tourism 'Partnership Agreements', with broader scope than current lease and licence arrangements and allow for partnerships which have shared tourism and conservation objectives and shared risks and returns on revenue and tenure.*

## 6. Enhance natural tourism marketing



Federal, State and Territory governments should implement a cooperative strategy with the tourism industry to market park destination brands and the innovative visitor experiences developed through Natural Tourism Partnerships.

### Recommended Action

*Implement a co-ordinated international and domestic marketing strategy for natural tourism and park visitor experiences through Brand Australia and 'National Landscape' brand park destinations.*

This marketing strategy should be based on sound consumer research and supported by marketing tools that appeal to the long stay responsible tourism market.

### Recommended Actions

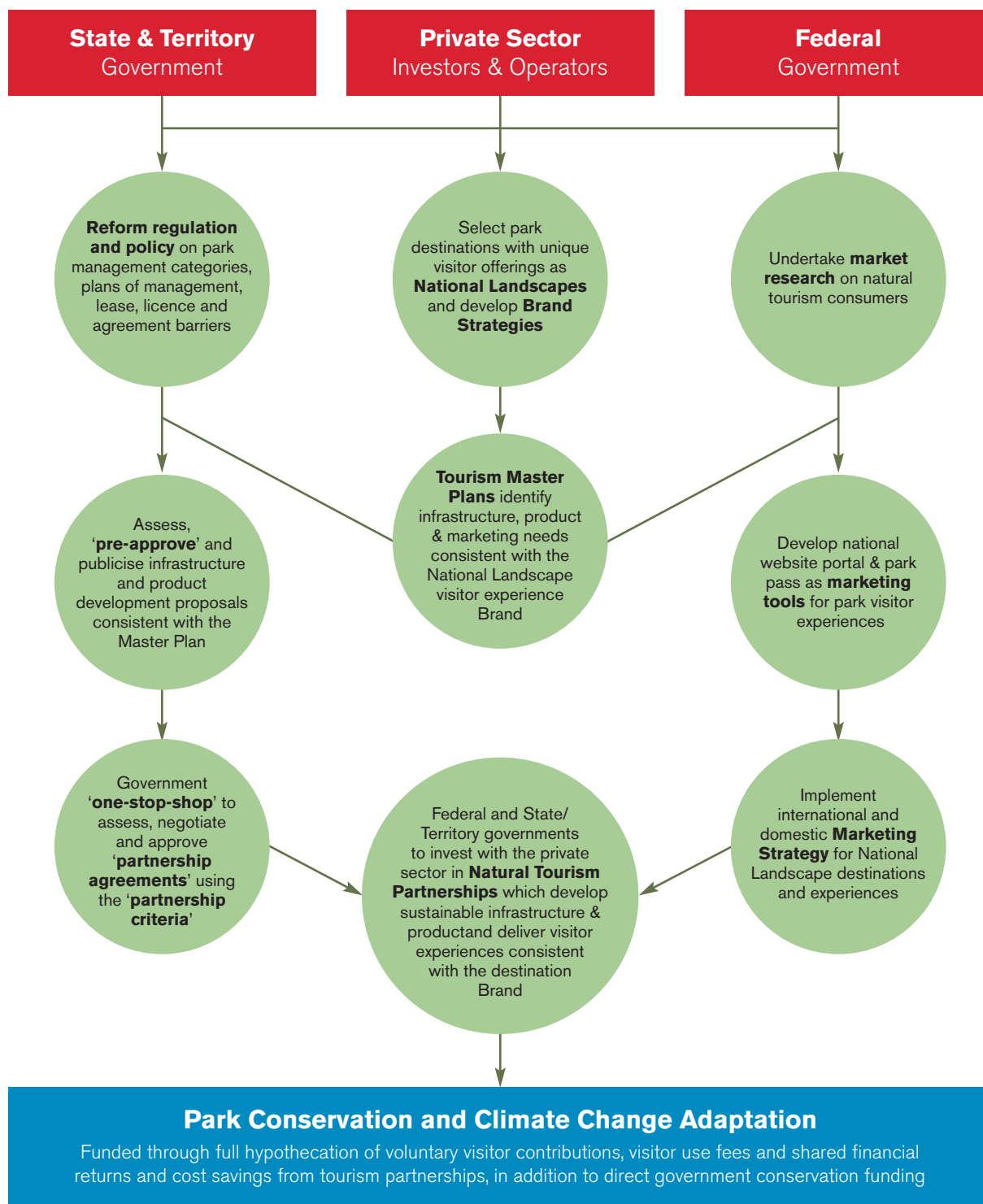
*Undertake further market research on natural tourism consumer demand, park visitor profile, consumer preferences and park brand recognition.*

*As key marketing tools, develop a single website portal to access park visitor experiences across Australia and a national 'AusParks' entry pass to Australian parks.*

## Action Plan Overview



This diagram provides an overview of the relationships between the State and Territory Governments, private sector investors and operators and the Federal Government in progressing and implementing this Natural Tourism Partnerships Action Plan.





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# 13. Appendices

## A1. Literature Reviewed

Title of Document	Author (Company/Name/Organisation)	Year
"How are we working together?" A Framework to Assess Collaborative Arrangements in Nature-Based Tourism	Ryan Plummer, Cory Kulczycki, Cynthia Stacey	2006
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A Natural Partnership : Making National Parks a Tourism Priority (Project Paper 1) The Visitor Experience	TTF Australia	2004
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ACT Our Industry Our Future: 2006 and Beyond	Tourism ACT	
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Attitudes to Entry Fees to National Parks	Wilson, Clevo and Tisdell, Clem	2004
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Fraser Coast Destination Management Plan	Tourism Queensland	2004
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Title of Document	Author (Company/Name/Organisation)	Year
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Public Policy for he Private Sector: Managing National Parks _ how PPPs can aid conservation	World Bank Group Private Sector Development Note 309	2006
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## A2: Investors Interviewed and Forum Attendees

### Investors Interviewed

The members of the investment community interviewed include:

Bruce Porter, Babcock and Brown  
Andrew Beatty, Baker and McKenzie  
Roy Melick, Baker and McKenzie  
John Stawyski, Blake Dawson Waldron  
Paul Davis, Bovis Lend Lease  
Warwick McInnes, Bovis Lend Lease  
Joost Heymeijer, Emirates Resorts  
Bruce Morris, General Property Trust  
Nick Whitby, Grollo Investments  
Troy Craig, Jones Lang LaSalle Hotels  
David Gibson, Jones Lang LaSalle Hotels  
Marshall Vann, MFS Living & Leisure Group  
John Simmonds, Stella Resorts Group

### Natural Tourism Partnership Forum Attendees

Representatives from the following organisations participated in the TTF Natural Tourism Partnerships Forums:

Australian Conservation Foundation  
Australian Geographic  
Australian Motoring Services  
Babcock & Brown  
Baker & McKenzie  
Blake Dawson Waldron  
Bovis Lend Lease  
Brisbane Marketing  
Centennial Parklands  
Department of Environment and Conservation (NSW)  
Department of Environment and Conservation (WA)  
Department of Industry Tourism & Resources

Department of Infrastructure Delivery (QLD)  
Department of Tourism, Arts and the Environment (TAS)  
Department of Tourism, Fair Trading and Wine Industry Development (QLD)  
Discovery Ecotours Australia & Desert Tracks  
Forests NSW  
Gavin Anderson and Company  
Gold Coast Tourism  
Great Barrier Reef Marine Park Authority  
Green Globe  
Griffith University  
Grollo Group  
Indigenous Business Australia  
InterContinental Hotels Group  
La Trobe University  
MFS  
Monash University  
Parks Australia  
Parks Victoria  
Queensland Parks & Wildlife Service  
South Australian Tourism Commission  
Stella Resorts Group  
Sustainable Tourism CRC  
The GPT Group  
The University of Queensland  
Tourism Australia  
Tourism Industry Council Tasmania  
Tourism New South Wales  
Tourism NT  
Tourism Queensland  
Tourism Tasmania  
Tourism Victoria  
Tourism Western Australia  
TTF Australia  
University of Technology, Sydney  
Voyages Hotels & Resorts  
Wet Tropics Management Authority  
World Commission on Protected Areas



## A3: Park System Case studies

The following details the regulatory impact on NTPs in several park systems.

### A3.1. Commonwealth System

Legislation provides two main roles for the Commonwealth in conserving the environment. The first role is as regulator over matters of national environmental significance across all levels of Government, through mechanisms such as World Heritage listing, under the *Environment Protection and Biodiversity Conservation Act 1999 (EPBC Act)*. Commonwealth legislation also plays a significant role in Native Title issues.

The second Commonwealth role is as manager of protected Commonwealth land and marine areas under various Acts. Since land tenure is fundamentally a State issue, the number of Commonwealth Parks is limited. However, Commonwealth parks do include iconic tourism destinations such as Uluru, Kakadu and the Great Barrier Reef. Most Commonwealth Parks are managed by Parks Australia and some parks are managed jointly with their Aboriginal Traditional Owners. Currently 21 Commonwealth reserves are declared under the EPBC Act comprising 6 National Parks, 13 Marine Protected Areas and 2 Botanic Gardens.

#### A3.1.1. Matters of National Environmental Significance and Native Title

Environment Protection and  
Biodiversity Conservation Act 1999

The Objects of the Environment Protection and Biodiversity Conservation Act 1999 (EPBC Act) under Section 3(2)(a) includes *“an appropriate role for the Commonwealth in relation to the environment by focusing Commonwealth involvement on matters of national environmental significance and on Commonwealth actions and Commonwealth areas”*. These matters of national environmental significance include:

- World Heritage properties
- National Heritage places
- Wetlands of international importance (Ramsar wetlands)
- Threatened species and ecological communities
- Migratory species
- Commonwealth marine areas

The Commonwealth role on these matters comes from differing powers in the Constitution. World Heritage properties, for example, arise from World Heritage listing under Article 11 of the World Heritage Convention using the Commonwealth's External Affairs power.

Essentially the *EPBC Act* requires Plans of Management for the matters of environmental significance, and assessment and approval to be given for any action that may cause a significant impact on one of the matters.

Approvals are given by the Approvals and Wildlife Division of the Commonwealth Department of the Environment and Heritage. Approval is required regardless of whether the action is in State, Territory or Commonwealth land or marine areas. For Commonwealth Areas the *EPBC Act* effectively takes on the role of equivalent State environmental assessment legislation.

Attempting to minimise assessment and approval time delays the *EPBC Act* under Section 3(2)(d) *“adopts an efficient and timely Commonwealth environmental assessment and approval process that will ensure activities that are likely to have significant impacts on the environment are properly assessed;”* this includes mandatory timeframes for determining approval.

On matters of national environmental significance the *EPBC Act* overlays State, Territory and the Great Barrier Reef Marine Park legislation. This creates another level of approval over and above the relevant state parks and environmental assessment legislation. Recognising the difficulties this may impose, the Commonwealth can empower States to approve these actions. The *EPBC Act* under Section 3(2):

*“(b) strengthens intergovernmental co-operation, and minimises duplication, through bilateral agreements; and*

*(c) provides for the intergovernmental accreditation of environmental assessment and approval processes;”*

Not surprisingly these matters of national environmental significance, such as National Heritage places, often apply to protected areas under State, Territory and Commonwealth management.

Critically these matters may not be limited by a geographic border, but defined by a heritage ‘value’ or species. A tourism venture may involve an action that significantly impacts on a heritage ‘value’ even if the action is on freehold land not within the confines of a park or a World Heritage or National Heritage place.

#### Native Title Act 1993

Since parks have typically had less history of use and development and are often in regional and remote areas, parks or adjacent areas are often affected by native title issues.

Where native title has not been extinguished, traditional indigenous communities may have a range of rights to use

land and sea areas (such as hunting and fishing) and may also have rights to negotiate over other use of these areas.

Where native title has not been extinguished, the granting of a lease or licence in Commonwealth, State or Territory parks may be effected by these native title rights under the Commonwealth *Native Title Act 1993* and equivalent state Native Title legislation.

Many parks in Australia are jointly managed by the park agency and indigenous communities or may be specifically reserved in a category as an Aboriginal Area.

### A3.1.2. Commonwealth Managed Parks

The *Environment Protection And Biodiversity Conservation Act 1999 (EPBC Act)* provides for the declaration and management of parks in Commonwealth areas, similar State legislation.

#### Categories and Management Objectives

Parks are managed in accordance with the objectives of the *EPBC Act* which requires that parks are allocated to the the IUCN Categories. Most Commonwealth Parks are Category II National Parks, providing for tourism and recreation as a primary objective of park management.

#### Planning and Assessment

Under the *EPBC Act* each Commonwealth Park has a Plan of Management. In Commonwealth Parks all planning, assessment and approval is done under the *EPBC Act* and is not subject to State planning and assessment legislation. NTPs in Commonwealth Parks have the advantage of dealing with only a single layer of Government.

Parks Australia is taking an innovative approach to planning. Working with Tourism Australia, PA is developing Brand Strategies for iconic destinations such as Kakadu. The destination brand is defined by the visitor experience not by the boundaries of parks. The Brand Strategy leads to a Tourism Masterplan for the destination which in turn drives the Plan of Management for park/s in the destination. (see Case Study 7: Brand Kakadu and Case Study 8: National Landscapes)

#### Leases and Licences

Section 358(2) of the *EPBC Act* provides that the *"Director may grant a lease or sub-lease of, or a licence relating to, land or seabed in a Commonwealth reserve, but only in accordance with a management plan in operation for the reserve."*

There is no term limits specified in the legislation or regulations for granting leases and licences. Parks Australia policy is to assess length of leases on the basis

of the amount of capital investment required by the operator.

#### Financial Mechanisms

Park usage fees may be levied in parks under Section 356A including:

*"(a) entering or using a Commonwealth reserve or part of a Commonwealth reserve; and*

*(b) using services or facilities provided by the Director in or in connection with a Commonwealth reserve; and*

*(c) the parking or stopping of vehicles in a Commonwealth reserve"*

Current Commonwealth Government policy means fees are not currently levied in all parks. Section 514S of the EPBC Act provides for park usage fees and other revenue to be paid into the Australian National Parks Fund including:

*"(c) any amounts paid to the Director in respect of leases, licences, permits and other authorities granted by the Director in relation to Commonwealth reserves or conservation zones"*

The Australian National Parks Fund in turn pays for the Commonwealth Park system.

### A3.1.3. The Great Barrier Reef Marine Park

The Great Barrier Reef Marine Park and the Great Barrier Reef Marine Park Authority (GBRMPA) provide an unusual model of protected area management. Established by the *Great Barrier Reef Marine Park Act 1975*, the GBRMPA is a Commonwealth statutory authority based on a range of Constitutional powers. A Queensland Government nominee has membership in the 4 person Authority.

As a statutory authority with responsibility for zoning, planning and approval of an entire park destination, the GBRMPA (working closely with the QPWS for adjacent state marine park waters) has effectively acted as one-stop shop for tourism investors and operators (see Case Study 5). This is a unique cross-jurisdictional collaboration between the Commonwealth and Queensland Governments.

The recent *"Review of the Great Barrier Reef Marine Park Act 1975"* (the Review) supported the GBRMPA remaining a statutory authority, while recommending changes to governance structures. The Review also identified changes to zoning and assessment, to reduce complexity and duplication with the EPBC Act.

#### Categories and Management Objectives

The GBRMP is a multiple use Marine Park where "reasonable use" including commercial fishing and tourism

co-exist with conservation objectives. Under Section 32 of the Act the GBRMPA has developed a zoning plan for the Marine Park which was approved by the Minister for the Environment and Heritage and laid before Parliament in 2004. The Zoning Plan consists of a:

- Preservation Zone.
- Marine National Park Zone.
- Scientific Research Zone.
- Buffer Zone.
- Conservation Park Zone.
- Habitat Protection Zone.
- General Use Zone.

These zones are the equivalent of categories and the recent Review has recommended that each zone be assigned an IUCN category, consistent with the EPBC Act.

#### Plans of Management

Under Sections 39V-39ZI of the Act, the GBRMPA has the ability to prepare PoM for high use or sensitive areas within the Marine Park consistent with the zoning plans. The Act contains extensive provisions for the development of PoMs. Ministerial approval is not required. There are currently 3 PoMs which predominately address tourism use of the Cairns, Hinchinbrook and the Whitsundays Areas. These areas form less than 8% of the Marine Park. Permits for tourism activities must be in accordance with PoMs.

#### Assessment

Under the the *Great Barrier Reef Marine Park Regulation 117*, the GBRMPA must make an assessment of the impact on the Marine Park before issuing a permit. Regulation 74(5) specifies that the GBRMPA when considering an application must have regard to a number of issues including the objectives of the zone, the cultural and heritage values, and conservation of resources.

Where the tourism operator requires access to Commonwealth and State Marine Parks, there is a simultaneous assessment as part of a seamless process to issue joint Marine Parks permits. Where the activity may restrict the reasonable use of the public, public advertising and a Public Environment Report or an Environmental Impact Statement may be required.

An additional assessment may be required by the Commonwealth DEW under the *EPBC Act* where any activity may have a significant impact on a "matter of national environmental significance".

To eliminate this duplication and differences in assessment processes, the Review has recommended that all assessment take place under the *EPBC Act* and that GBRMPA

be the determining authority for this assessment and approval. Proposals with high environmental risk and impact outside the park would be assessed and approved by the DEW. This could mean a true and complete one-stop shop for most NTP approvals but may result in a loss of independent approvals in the Marine Park.

#### Leases and Licences

The GBRMPA issues Permits for tourism operations in the Marine Park. These Marine Parks permits are often two permits in the one approval. They grant permission for activities in both state marine parks (under the *QLD Marine Parks Act 1982*) and the Great Barrier Reef Marine Park (under the Commonwealth *Great Barrier Reef Marine Park Act 1975*).

Permits are required for a range of activities, generally permits will be required for:

- Most commercial activities, including tourist operations
- Installation and operation of structures, such as jetties, marinas and pontoons
- Any works, such as repairs to structures, placement and operation of moorings

New permits for commercial tourism operations are generally granted for one year. Existing permit holders who apply to continue the same operation and satisfy the assessment requirements are generally granted a permit for six or fifteen years, depending on the activities to be conducted and whether the tourism operation satisfies the GBRMPA's internationally recognized high standard tourism program requirements.

Regulations 88A to 88C provide for the GBRMPA to allocate special tourism permissions through an expression of interest process. Applicants are ranked based on their responses to selection criteria.

The generic criteria that have been approved by the Authority include consideration of how the operation enhances protection and presentation of the Marine Park values and the value of contributions to fulfill management responsibilities.

Islands within the Marine Park are typically freehold land or Queensland crown land requiring leasing under the appropriate Queensland legislation, but there are some Commonwealth islands with leases in place under GBRMPA legislation. In addition, a tourism operation on an island is likely to require a permit from GBRMPA if structures such as jetties and activities such as cruises and diving expeditions were planned in the Marine Park.

## Financial Mechanisms

Fees and charges may be applied by GBRMPA under regulations for a variety of purposes. The primary user pays charge is the Environmental Management Charge levied under Section 39A of the Act. This charge is essentially levied on park visitors and collected by commercial tourism operators who have permits to operate in the Marine Park. Revenues raised through this charge are paid to consolidated revenue but are returned to GBRMPA under Section 39I of the Act as a special appropriation.

### A3.2. New South Wales System

The NSW Parks system is managed by the NSW Parks & Wildlife Service (NPWS). The primary enabling legislation is the *National Parks and Wildlife Act 1974* under which NPWS manages parks covering 6.4M hectares, representing 8% of NSW land. NPWS also administers the Wilderness Act 1987 with Wilderness Areas covering 1.9M hectares which is 2% of NSW land.

The NPWS and its Director-General have statutory powers to manage parks, however the Service is not a statutory authority but is currently constituted as the Parks and Wildlife Division of the NSW Department of Environment and Conservation (DEC).

The NPWS has a decentralised structure with responsibilities and legislative powers delegated to Branch Directors of four geographic branches, and multiple Regional Managers for regions within each branch. The Regional Managers are responsible for multiple parks. Management of the relationship with lessees and licensees (and the identification of potential new commercial opportunities) is devolved to the Branch and Region level in consultation with the visitor and business program section of the Reserve 7 Wildlife Conservation Branch.

#### Categories and Management Objectives

The object of the *National Parks and Wildlife Act 1974* is the conservation of nature, objects, places or features of areas reserved under the Act. An additional object of the Act under Section 2A(1)(c) also provides for “*fostering public appreciation, understanding and enjoyment of nature and cultural heritage and their conservation*”

Land is reserved under the Act in the categories of National Park, Historic Site, State Conservation Area, Regional Park, Karst Conservation Areas, Nature Reserves or Aboriginal Areas. Each category of reservation has specific management principles (objectives).

The management principles generally include the promotion of “*public appreciation and understanding*” of

the reservations “*natural and cultural values*”. With the exception of Nature Reserves and Aboriginal Areas, the management principles also include provisions “*for sustainable visitor use and enjoyment that is compatible with the conservation*” of the area and “*provision for the sustainable use (including adaptive reuse) of any buildings or structures or modified natural areas having regard to the conservation*” of the area.

Essentially the Act provides for both conservation and managed sustainable visitor use. Under the Act visitor usage is primarily for education and enjoyment; rather than the economic contribution of tourism to the park system or to local regional economies.

#### Plans of Management

Planning and development in parks are affected by both the *National Parks and Wildlife Act 1974* and the *NSW Environmental Planning and Assessment Act 1979*.

PoMs are established for parks reserved under the *National Parks and Wildlife Act 1974*. Under Section 72AA plans of management must address the “*relevant management principles*” and include “*the provision of opportunities for public understanding, enjoyment and appreciation of natural and cultural heritage values, including opportunities for sustainable visitor use*”

Under Section 81 and 81A of the Act all activities in parks including private sector involvement through leases and licences, must be carried out in accordance with the PoM.

PoMs are adopted, amended or cancelled by the Environment Minister after public notice, consultation, consideration and advice from the relevant Regional Advisory Committee and the National Parks & Wildlife Council established under the Act. Lease and licence holders have no specific consultative rights on PoMs under the Act.

Should a new NTP proposal not be in accordance with the current PoM, an investor would need to pursue a proposal with the DEC to amend the current PoM which is a highly proscriptive process under the Act.

#### Assessment

The *Environmental Planning and Assessment Act 1979* applies to NPWS for consent to developments under Part 4, and approval of activities under Part 5, of this Act. In certain circumstances, the NPWS Director-General is the determining authority for development within parks and development consent is not required from the local council.

As the determining authority, the Director-General must still act in accordance with Section 111 of the *Environmental*

*Planning and Assessment Act 1979* and examine the effect of a development on the environment with the benefit of a Review of Environmental Factors. This may in turn lead to an Environmental Impact Statement before works can commence.

The most significant tourism ventures in NSW Parks are in the Kosciusko National Park ski-fields where the Department of Planning is the determining authority.

Approvals may also be required under the *Heritage Act 1977*, however the DEC has delegation to issue most approvals under this Act. Where an item is on the State Heritage register, then the Heritage Council may also be another determining authority.

### Leases and Licences

The Act provides for leases and licences to the private sector under Part 12, provided they are in accordance with the PoM for each park. There is no specified limit to lease periods in the Act, however current Ministerial Delegations limit the authority of the Director-General to grant leases to 20 years, Directors to 15 years and Regional Managers to 10 year tenures. In practice, leases rarely exceed 20 years outside Kosciusko National Park.

Licences for tourism operations in park are referred to as Commercial Tourism Operation (CTO) Licences and are typically granted for 1-5 years. NPWS is currently undertaking an extensive review of CTO process to develop a new licensing system.

The Act allows for leases to both develop and operate tourism facilities and accommodation in National Parks and Historic Sites. Under Section 151(1) the Environment Minister may:

- (a) grant leases of land within a national park or historic site for the purpose of:
  - (i) the erection thereon of accommodation hotels or accommodation houses, or
  - (ii) the provision thereon of facilities and amenities for tourists and visitors,
- (b) grant leases of lands within a national park or historic site on which accommodation hotels or accommodation houses have been erected or facilities and amenities for tourists and visitors have been provided

Leases under Section 151, 47U and 47GC provide scope for both tourism and accommodation ventures in parks and

public-private partnership models to develop park visitor infrastructure. Section 152 also provides for licences for private sector trade and franchises within a National Park or Historic Site.

The purpose of leases which may be granted by the Minister has been successfully contested in cases such as *Woollahra Municipal Council v Minister for the Environment* (1991) 23 NSWLR 710. Leases may require a strong nexus with the management objectives of the Act such as the public appreciation of natural values of the park. This nexus may inhibit innovation in visitor experiences by preventing activities which are not primarily related to park conservation such as functions and events.

Section 151B was an amendment to the Act designed to enhance the leasing and licensing powers of the Minister for the adaptive reuse of existing structures, by removing the need for a nexus with the objectives of the Act. Leases for the adaptive reuse of existing buildings (but not the erection of new buildings) may be granted under Section 151B(2):

*"The Minister may, on such terms and conditions as the Minister thinks fit, grant a lease of land within a reserve to enable the adaptive reuse of an existing building or structure on the land for any purpose specified in sub-section (12) (whether or not it is a purpose for which the land is reserved)."*

Licences may be granted under Section 151B(3) where the Minister may grant:

*"a license under this section to occupy and use land within a reserve, and any existing building or structure on the land, for any purpose (whether or not it is a purpose for which the land is reserved), but may do so only if:*

- (a) the land is a modified natural area, and
- (b) the licence is granted for a term not exceeding 3 consecutive days."

These licences, while restricted to 3 days in modified areas, do not require a strong nexus to the objectives of the Act and may be used for concerts, weddings and events.

Overall, the Act certainly provides a positive framework for NTPs and NPWS has a long history of private sector involvement as a result. While the Act may allow leases for new NTPs in parks, current Government and NPWS policy applies further restrictions such as those outlined in the NPWS *Property & Leasing Manual*.



## NPWS Property & Leasing Manual

### 6.2.3 Leasing and Licensing Policy

- *Wherever possible the establishment of facilities, services and amenities serving the needs of park visitors should take place outside parks in order to protect as far as possible those values for which the parks were reserved.*
- *Where it is not feasible or suitable for such developments to be provided outside parks and such developments are permissible in and compatible with the areas concerned the Department will consider on-park establishment of such facilities.*
- *Where such developments are commercially viable and in order to permit deployment by the Department of its scarce financial and human resources elsewhere the Department will consider the establishment and operation of such facilities by private enterprise under appropriate commercial agreements.*
- *Leasing and licensing activities in park areas should facilitate appropriate park use and appreciation by visitors and meet reasonable demands of public comfort and enjoyment.*
- *Leasing and licensing activities in park areas shall be limited to locations where impact on the environment is deemed acceptable and the least damage to park values will occur.*
- *Leasing and licensing activities shall be consistent with the Department's primary obligations for protection and conservation of natural and cultural resources and provision of recreational opportunities.*

### 6.4.2 Visitor Accommodation Policy

- *In general, accommodation facilities will not be provided on reserved lands near large urban or town centres where a wide range of alternative accommodation already exists.*
- *Sophisticated facilities for overnight accommodation such as hotels, motels, etc, are generally not seen as appropriate in national parks and state conservation areas. Exceptions to this may be made in areas where a particular recreation opportunity exists which is not available outside reserved lands. An example is the village system in the snowfields such as at Perisher and Thredbo where public accommodation is usually provided by long-term leaseholders and sublessees. Another is where opportunities for adaptive reuse may include accommodation. In general, accommodation facilities for the public will not be provided in nature reserves.*
- *The Department will encourage the development of accommodation on appropriate sites outside reserved lands. In some cases accommodation development will be encouraged adjacent to parks and reserves to contribute to regional and local tourism.*
- *The renewal of existing arrangements covering resorts and hotels will be kept under review by the Department having regard to the availability of alternative accommodation outside the parks and/or the level of environmental impact on the parks and/or changed environmental or social conditions.*
- *Low key accommodation such as cabins may be provided in appropriate reserved lands. Generally such developments are more appropriate in State Conservation Areas.*
- *Generally huts erected on reserved lands will be phased out. A number of shelter huts are present on reserved lands which will be managed to provide day and overnight shelter and storage of management approved equipment.*
- *Individual huts or similar structures that are identified as having special historic or cultural value will also be managed as historic places. In some cases the use of huts for public shelter may continue.*

Essentially under current policy, NTPs in parks (particularly accommodation ventures) are an exception to the rule. New hard roofed accommodation ventures are basically not envisaged under the policy.

While low key accommodation such as huts, cabins and tented and demountable resorts are permissible, they are not promoted by the policies. However, the NSW Government's recent State Plan calls for a 20% increase in park visitation which may provide the impetus to review these accommodation policies.

New proposals for private sector involvement in parks can be initiated by the DEC and affected by a public call for EOI or tender. Alternatively a proposal may be initiated by the private sector making an application, which may result in an EOI or tender process.

#### Financial Mechanisms

Visitor entrance fees can be applied to parks and the Act, under Section 143, allows for a range of charges to be levied where the NPWS:

- (a) supplies any service, product or commodity,*
- (b) grants any licence to carry on a trade, business or occupation,*
- (c) gives any permission, consent or approval or issues any licence, registration certificate or permit, or*
- (d) furnishes any information*

Section 137 provides for the National Parks and Wildlife Fund into which charges and fees are paid, including under Section 138(1)(b) all monies received from:

- (i) leases, licences, permits or occupancies within a national park, historic site, state conservation area, regional park, nature reserve, karst conservation reserve, Aboriginal area or land for which the National Parks and Wildlife Reserve Trust is trustee,*
- (ii) leases and licences granted under section 151 (2),*  
... and ...
- (iv) franchises granted under section 152*

Monies received through Section 149 from leasing of land reservations adjacent to parks, and all money provided by Parliament for the purposes of the Act, are also paid into the *National Parks and Wildlife Fund*. The *National Parks and Wildlife Fund* in turn funds the administration of the Act including the acquisition of new land.

These sections of the Act essentially ensure that any monies received from private sector operation in parks (or land adjacent to parks acquired under S146) will be

returned to the parks system rather than consolidated state revenue. NTPs will therefore make a direct economic contribution to park areas.

#### Private Sector Operations Adjacent to Parks

Land adjacent to reserved and dedicated areas can be acquired by the Minister under Section 146 of the Act and under Section 149 this land may be subsequently sold or leased.

This land is not subject to the Management Objectives or PoM of the park, but is subject to the planning and approval processes under the *Environmental Planning and Assessment Act 1979*. This adjacent land provides greater scope for potential NTPs with NPWS.

#### Wilderness Act 1987

The *Wilderness Act 1987* preserves Wilderness Areas as a distinct category of protected area, which management objectives under Section 9:

- (a) to restore (if applicable) and to protect the unmodified state of the area and its plant and animal communities,*
- (b) to preserve the capacity of the area to evolve in the absence of significant human interference, and*
- (c) to permit opportunities for solitude and appropriate self-reliant recreation.*

These objectives are clearly intended to limit visitor usage such as organised tourism. Furthermore, Section 153A of the *National Parks and Wildlife Act 1974* stipulates that The Minister or Director-General shall not:

- (a) grant a lease or licence under section 151 (1) or 151B, or*
- (b) grant a licence or franchise under section 152, or*
- (c) grant a lease, licence, easement or right of way under section 153D, in respect of land that is within a wilderness area.*

These provisions effectively prevent private sector operations in Wilderness Areas. There has been significant growth in area covered by the Wilderness Act 1987 which at 1.9M hectares now accounts for approximately 2% of NSW.

#### Forestry Act 1916

State Forests, Timber and Flora reserves under the *Forestry Act 1916* often border parks or may be a visitor destination in their own right. Forests NSW can approve an occupation permit *"for any purpose approved by the commission and specified in the permit"*. Special purposes permits can also be granted for a range of

prescribed activities, including visitor experiences such as trail rides, motor vehicle or boat use which may not be permitted in a Plan of Management under the *National Parks and Wildlife Act 1974*.

Section 33 of the *Forestry Act 1916* also provides for forest leases which may be used for commercial tourism activity ... *"(1) The commission may lease, on such conditions as it thinks fit, land within State forests for grazing or any purpose approved by the commission and not opposed to the interests of forestry.* Forests NSW can approve a lease up to 6 years and 40 hectares. The Minister may approve leases for up to 20 years and greater than 40 hectares. Leases can be granted up to 50 years if specific conditions are met.

#### Other Crown Land

For other crown land, Section 41 of the Crown Lands Act 1989 provides *"The term of a lease of Crown Land (including any option for the grant of a further term) granted by the Minister is not to exceed 100 years."*

### A3.3. Victorian System

The Victorian parks system is managed by Parks Victoria (PV) under a Management Services Agreement with the Department of Sustainability and Environment (DSE). The primary enabling legislation for the Victorian parks system is the *National Parks Act 1975*.

PV is established under the *Parks Victoria Act 1998* to provide services to a range of government agencies including Melbourne Water. As a result, PV is responsible for a broader range of public reserves and estate than most park agencies.

PV manages 3.95 million hectares (17 per cent of Victoria) of parks and reserves which are mostly protected areas. The Victorian system includes 40 national parks, 13 marine national parks, 11 marine sanctuaries, 3 wilderness parks, 27 state parks, 31 metropolitan parks, 61 other parks and about 2,800 natural features and conservation reserves.

The Chief Executive Officer of PV is the Director of National Parks under legislation, however PV's services are primarily delivered (through the services agreement) with the powers of the Secretary (DSE) under the *National Parks Act 1975*.

PV cites over 71 million visits to their estate each year including such varied destinations and attractions as Port Phillip Bay, Albert Park (location of the grand prix), Yarra River, Mornington Peninsula, Port Campbell, Grampians, Dandenong Ranges, 12 Apostles, Wilson's Promontory and the Great Ocean Walk.

#### Categories and Management Objectives

The *National Parks Act 1975* provides in Section 4 the objectives for parks under the Act. As well as the conservation objectives Section 4 includes an objective to *"(c) to make provision in accordance with the foregoing for the use of parks by the public for the purposes of enjoyment, recreation or education and for the encouragement and control of that use."*

Sections 17 and 18 of the Act, provide for the categories of: National Parks, State Parks, Wilderness Parks, Marine National Parks, Marine Sanctuaries and Other Parks and spells out the specific management objectives of these park categories. The objectives for each park type are principally for conservation, but also include provision for public use, enjoyment and education in all parks except Wilderness Parks.

The objectives of the Wilderness Park category is to limit visitor use, under Section 17A(3)(a), to opportunities for *"solitude and appropriate self-reliant recreation in a wilderness park"*. Restrictions in Wilderness Parks, and Wilderness Zones in other park types, are an intentional barrier to development and effectively limit visitor use and tourism to non mechanical activities.

#### Planning and Assessment

Planning and development in parks are subject to both the *Planning and Environment Act 1987* and the *National Parks Act 1975*.

The Act simply requires within Sections 17, 17B, 17D and 18 that the Secretary shall prepare a PoM for each park. While the Minister and Secretary are subject to the Act in granting of leases, tenancy or permits, there is no specific section of the Act requiring that leases and permits to be in accordance with PoMs. In practice the PoMs generally call for leases to be granted consistent with the Act.

Section 23. allows for permanent works to be carried out in parks *"Subject to the approval of the Minister, there may be carried out in a park which is not a wilderness park works for the construction of a building or other structure or other permanent works for the protection development or improvement of the park including the establishment of camping places roads and tracks."*

#### Leases and Licences

Lease tenure under the Act is restricted to a maximum of twenty years for a kiosk café, store or ski tow, or seven years for tenancy of a camping ground or building in Section 19 (2):

2) Subject to this Act, the Minister may, in respect of a park which is not a wilderness park-

(a) after consultation with the National Parks Advisory Council, grant to a person for a period not exceeding twenty years a tenancy of land in the park having an area of not more than one hectare for use as a kiosk cafe or store or for scientific research or for a ski tow at such rent and subject to such terms and conditions as the Minister determines; and

(b) after consultation with the National parks Advisory Council grant to a person a tenancy of a camping ground or building in the park for a period not exceeding seven years at such rent and subject to such terms and conditions as the Minister determines.

Due to the restrictive limits on leases the Act has been amended to allow for viable NTPs in specific sites, for example Section 29A and 29B provide for leases of up to 21 years for Wilsons Promontory National park lighthouse land and the Cape Otway lighthouse area.

Under Section 21(1)(c) permits (licences) for commercial activity for up to 3 years are allowable and the Secretary may:

(c) grant to a person a permit to carry on a trade or business in the park-

(i) subject to such terms and conditions and the payment of such fees and charge as the Secretary determines, for a period not exceeding six weeks; and

(ii) subject to such terms and conditions and the payment of such fees as the Minister determines, for a period exceeding six weeks but not exceeding three years.

#### Financial Mechanisms

The Act and Regulations allow for a range of visitor entrance fees and charges and rents for permits, leases and park usage. However, there is no dedicated fund to return this revenue to the park system and revenues received are not fully hypothecated to the park system. Under Section 33 of the Act:

*There shall be paid into the Consolidated Fund any moneys received by a Committee, the Council or any other person*

(a) by way of rents, fees, tolls or other charges payable under this Act or the regulations, whether under a lease, licence, permit, tenancy or other instrument granted under this Act or the regulations or by or under the National Parks Act 1975 or a corresponding previous enactment or the regulations made thereunder

#### Crown Land (Reserves) Act 1978

Unlike most State park agencies, Parks Victoria also manages some crown land reserved for broader public purposes under the *Crown Land (Reserves) Act 1978*. This Act provides the power to acquire and reserve crown land for purposes including schools, ports and railways. Specific purposes also include under Section 4(1):

(l) the preservation of areas of ecological significance;

(m) the conservation of areas of natural interest or beauty or of scientific historic or archaeological interest;

(n) the preservation of species of native plants;

(o) the propagation or management of wildlife or the preservation of wildlife habitat; and

(z) facilities and services for tourists or for the promotion of tourism

The relevant Minister can appoint a Committee of Management for reserved land which can be Parks Victoria. Under Section 17(2) of the Committee of Management:

(a) may grant licences to enter and use any portion of such land or any building thereon for any purpose consistent with the purpose of the reservation of the land for a period not exceeding three years;

(b) may enter into agreements to operate services and facilities consistent with the purpose of the reservation for a period not exceeding three years; and

(c) may enter into tenancy agreements with persons to erect buildings and other structures for any purpose consistent with the purpose of the reservation and any such agreement-

(i) shall provide that all buildings and structures become the property of the committee;

(ii) shall be for a specific term which shall not exceed three years

Hence, Section 17 limits licences and leases to 3 year terms. Where a committee of management is incorporated under Section 14A, those incorporated committees may grant a lease for up to 21 years under Section 14D:

(1) Notwithstanding anything in this Act but subject to sub-section (2), an incorporated committee may, with the consent of the Governor in Council, grant leases of any part of the reserved land for the purposes of providing facilities and services for the public.

(2) A lease granted under sub-section (1)-

(a) shall be for a specific term not exceeding 21 years;

These licences and leases are only for the purposes for which the land is reserved. At 17B licences may be granted (with the approval of the minister) for purposes other than which the land is reserved, however the term of licences remains limited to 3 years.

Under Section 17D leases may be granted (with the approval of the Minister) for purposes other than which the land is reserved for up to 21 years, except this power does not apply to lands reserved for conservation purposes at under Section 4(1):

- (l) *the preservation of areas of ecological significance;*
- (m) *the conservation of areas of natural interest or beauty or of scientific historic or archaeological interest;*
- (n) *the preservation of species of native plants;*
- (o) *the propagation or management of wildlife or the preservation of wildlife habitat*

Reserves under the Crown Land (Reserves) Act 1978 have some potential for longer lease tenures that Victorian parks, however maximum lease length remains short compared to other States and the Commonwealth.

#### Forests Act 1958

In addition to the parks system, Victoria has some 3.47 million hectares of State forests. Forests are managed by the Department of Sustainability and Environment for sustainable timber production, biodiversity conservation, water production and tourism and recreation.

State Forests are managed under the Forests Act 1958. The Act allows for leases of land in reserved forests under Section 51 where *"the Governor in Council may grant to any person for any term not exceeding twenty-one years a lease of any Crown Land within any reserved forest ... (c) for such other purposes and of such area as on the recommendation of the Secretary the Governor in Council in any particular case by Order determines:"*

These leases can be granted for tourism purposes. The Act also provides for licences under Section 52 (1) where the Secretary may grant to any person for a term of not more than 3 years or, with the approval of the Governor in Council, for a term of not more than 20 years' a licence or permit to enter land to provide accommodation, sell goods, operate ski lifts or *"to provide any other facility or service which the Secretary considers appropriate."*

#### A3.4. Queensland System

The Queensland Parks and Wildlife Service (QPWS) of the Environment Protection Agency manages protected areas

under the *Nature Conservation Act 1992*, the *Marine Parks Act 2004*, the *Recreation Areas Management Act 1988* and the *Forestry Act 1959*.

#### Categories and Management Objectives

The primary legislation for establishing and managing parks in Queensland is the Nature Conservation Act 1992. This Act provides for a wide range of park classifications with different management principles including:

*Section 14 The classes of protected areas to which this Act applies are-*

- (a) *national parks (scientific); and*
- (b) *national parks; and*
- (c) *national parks (Aboriginal land); and*
- (d) *national parks (Torres Strait Islander land); and*
- (e) *national parks (recovery); and*
- (f) *conservation parks; and*
- (g) *resources reserves; and*
- (h) *nature refuges; and*
- (i) *coordinated conservation areas; and*
- (j) *wilderness areas; and*
- (k) *World Heritage management areas; and*
- (l) *international agreement areas.*

Preserving the natural condition of parks is the underlying principle for park management in all classes. While the Act clearly envisages commercial activities in parks, visitor use and appreciation of parks is not specifically mentioned as a management principle in any class of park (or in the Act at all). For example, in National Parks visitor use is not mentioned just presenting the Parks values:

#### 17 Management principles of national Parks

*(1) A national Park is to be managed to--*

- (a) *provide, to the greatest possible extent, for the permanent preservation of the area's natural condition and the protection of the area's cultural resources and values; and*
  - (b) *present the area's cultural and natural resources and their values; and*
  - (c) *ensure that the only use of the area is nature-based and ecologically sustainable.*
- (2) The management principle mentioned in subsection (1)(a) is the cardinal principle for the management of national parks.*

There are classes of parks such as Wilderness Areas, where the management principles clearly work against tourism and limit visitor use in the area.



## Planning and Assessment

Under Section 111 the Minister must prepare a management plan for each park. Sections 110 to 125 provide extensive provisions on the preparation, notification, inviting submission, finalising, approving, amending and reviewing these plans.

The PoMs must be consistent with the Management Principles and under Section 34(2):

*A lease, agreement, licence, permit or other authority mentioned in subsection (1) must be consistent with--*

*(a) the management principles for the area; and*

*(b) if a management plan has been approved for the area, the management plan.*

In assessing a proposed lease, agreement etc, under Section 39B:

*(1) The chief executive may, before the interest is created, require the person to give the chief executive an EIS for the use, or a stated use, of the land under the interest.*

*(2) The EIS process under the Environmental Protection Act 1994 applies for the EIS as if the use or stated use were a project to which chapter 3, part 1 of that Act applies.<sup>5</sup>*

*(3) The person must pay the costs of preparing the EIS.*

## Leases and Licences

Commercial operations can occur in parks through Permits, Agreements and Leases. Under Section 34 of the Act:

*(1) A lease, agreement, licence, permit or other authority over, or in relation to, land in a protected area (other than an agreement or a licence, permit or other authority issued or given under a regulation) may be granted, made, issued or given only--*

*(a) by--*

*(i) if the area is a national park (scientific), national park or national park (recovery)--the chief executive under this Act; or*

*(ii) if the area is a conservation park or resources reserve--the chief executive or trustees of the area with the consent of the chief executive; or*

*(b) under another Act by--*

*(i) the Governor in Council; or*

*(ii) someone else with the consent of the Minister or chief executive.*

There is no maximum lease term specified in the Act. The Act also provides under Section 38 for leases in protect areas in accordance with the *Land Act 1994* which does have specified maximum terms.

The *Nature Conservation (Administration) Regulation 2006 19(g)* limits permits for commercial activity permit to a maximum of 3 years and Regulation 88 limits Commercial activity agreement to 10 years with options to renew.

Although the legislation provides for private sector operations in parks, current Government policy prohibits private sector operations in National Parks. For NTPs to occur in National Parks government policy would need to change or NTP sites declassified from National Parks to Conservation Parks.

## Financial Mechanisms

Current government policy is not to charge visitor entrance fees to parks. All revenue generated by parks goes into the state consolidated fund.

## A.4. Register of Natural Tourism Opportunities

The following is a list of potential projects identified by Federal State and Territory tourism and parks agencies that represent opportunities for possible private sector investment.

State	Park Destination	Partnership Opportunity	Contact
NSW	Ulladulla Harbour NSW South Coast	Opportunity for overall redevelopment of the Ulladulla Harbour precinct. A masterplan and zoning has been completed for the re-development of the fishing boat harbour for marina, tourist accommodation and associated recreation and service facilities.	Crown Lands Division of the Department of Lands on behalf of the Local Council.
NSW	Willandra Lakes World Heritage Area - Mungo National Park	IBA is intending to redevelop Mungo Lodge which is situated near the entrance to Mungo National Park. The Lodge and its associated facilities will be upgraded to a 4 star standard. The upgrade will include the installing of infrastructure such as water catchment, grey water and power generation. The Lodge will also look to introduce a touring component out of the Lodge and also create a dining experience in the region.	Indigenous Business Australia
NSW	Lyrebird Rainforest Sky Walk Barrington Tops	Opportunity for construction of Canopy Walk in Barrington Tops National Park with access via Barrington Guest House. This project has the support of Dungog Council and local National Park interest.	Tourism NSW
NSW	Sealy Lookout/Bruxner Park, Coffs Harbour area	Opportunity to develop an interpretive facility plus restaurant and interactive night tours, a sky walk extension and a "flying fox" adventure experience within the vicinity.	Forests NSW
NSW	Yerranderie Historic Site and Conservation Area	Opportunity to develop a quality nature and cultural based product on a restored privately owned historic silver mining town set in 1100 acres of wildlife sanctuary in a remote area west of Sydney surrounded by the World Heritage Blue Mountains and Lake Burrigorang. Road access is from the west via a partly unsealed road south east of Oberon taking up to 5 hours from Sydney. A private airstrip also allows air access for small aircraft. Existing buildings provide basic accommodation for approx 40 visitors with an additional 30 being accommodated in the nearby campground. The remainder of the site consists of some cleared land and bush suitable for the construction of additional accommodation. The owner intends to dispose of the site either via donation or sale.	Tourism NSW
NSW	South Solitary Island Lighthouse Quarters– North Coast NSW	Opportunity for adaptive re-use of old lighthouse quarters to tourist accommodation within the Solitary Islands Marine Park. Currently, access is only by helicopter, but could be an opportunity to reopen a jetty under adaptive re-use (in sanctuary zone).	Tourism NSW
NSW	Lake Cudgen – Tweed Coast, Northern NSW	Potential for low impact eco-tourism accommodation, water and land-based tours on crown land adjacent to Cudgen Lake Nature Reserve between Kingscliff and Cabarita with views to Mt Warning. Lake and nature reserve has opportunities for interpretive tours for on-site guests, as well as those within the various Tweed Coast resorts and hotels. Possible base for tours into the World Heritage Rainforest Areas.	Crown Lands Division of the Department of Lands
NSW	Wee Jasper Nature Reserve associated opportunities – South-Eastern NSW	Opportunity to enhance the existing caves system; provide nature based accommodation; and develop serviced walk products along sections of the Hume and Hovell Walking Track. Current licensee of Caves Reserve supports development opportunity. Regional Crown Reserves within immediate area of caves - support specialised camping and potential for other accommodation facility.	Crown Lands Division of the Department of Lands
NSW	Lake Burrendong State Park Central NSW	Opportunity for tourist accommodation on Crown land. Existing facilities include caravan park and boat ramps.	Crown Lands Division of the Dpt of Lands
NSW	Lake Keepit State Park North West NSW	Opportunity for tourist accommodation on Crown Land. Established facilities include tourist camping, camp-o-tell and cabin facilities plus camping and picnic facilities along the Namoi River.	Crown Lands Division of the Department of Lands

State	Park Destination	Partnership Opportunity	Contact
VIC	Great Ocean Walk, Otways - demountable accommodation (existing activity)	Parks Victoria is exploring the viability of a high yield, low volume 'premium' commercial walk and accommodation product on or adjacent to The Great Ocean Walk between Apollo Bay and Glenample Homestead near the Twelve Apostles. Seven purpose built hike-in camps have been constructed offering tent pads, toilets, shelters, rain water tanks and camp tables. The development of a commercial walk product is identified as a priority project.	Parks Victoria
VIC	Loch Ard Stage 1 Development	Potential opportunity for a new visitor centre and interpretive displays at Loch Ard Gorge in Port Campbell National Park.	Parks Victoria
VIC	Otway Forest Lodge	Opportunity to develop Otway Forest Lodge as quality nature based accommodation adjacent to the Great Otway National Park. The proposal is the first project under Victoria's Land Bank project.	Parks Victoria
TAS	Three Capes Track, Tasman Peninsula	Opportunity for up to 10 new tourism products along the Three Capes Track, including bus charters, boat based cruises, sea kayaking, walking tours, helicopter flights and on and off site accommodation.	Department of Tourism and Environment Tasmania
TAS	Musselroe Ecotourism Development N E Tasmania	Proposed \$150M ecotourism development for NE Tasmania including a 100 bed resort, 18 golf course and 320 holiday homes and apartments on 1900 ha of private freehold farmland, surrounded by the Mt William National Park and the Musselroe Bay Conservation Area. The planning for the development is predicated on maintaining or enhancing the areas natural and cultural values. A partnership model is proposed for a long terms co management agreement covering both the reserves and the freehold area.	Department of Tourism and Environment Tasmania
TAS	Wildlife Tourism Projects, Tasmania	The DTAE have produced a strategic vision for the development of wildlife tourism in Tasmania. DTAE have assessed ten key sites in the reserve system that have potential as dedicated wildlife viewing sites. Several of these sites have considerable commercial tourism potential. It is proposed to 'package' some of these sites and seek funding partners to fully develop the potential of these sites.	Department of Tourism and Environment Tasmania
TAS	Lake St Clair/Cradle Mountain	Opportunity for the conversion of an old hydro pump station at Pump House Point at Lake St Clair. The current operator's lease is due to expire and may need refinancing.	Department of Tourism and Environment Tasmania
NT	Kakadu National Park	Under the Tourism Master Plan, a number of visitor infrastructure and accommodation opportunities are planned in certain precincts, starting with the Jim Jim Falls area. (Kakadu is a Commonwealth Area)	Parks Australia
NT	Uluru/Kata Tjuta National Park	Opportunity to develop an 'experiential' accommodation option within the National Park or on the surrounding Aboriginal Land Trust, owned and managed by the traditional landowners. A review of the management plan is also underway to identify infrastructure needs commensurate with park's iconic tourism status and key role as a gateway to the Red Centre National Landscape.	Tourism NT
NT	Uluru/Kata Tjuta National Park	Opportunity to redevelop the Uluru Sunrise Viewing area with commercial, retail and hospitality concessions.	Tourism NT
NT	Watarrka National Park	Opportunity to develop tour operations and educational program for visitors within the park under the 'Territory Ark' Threatened Species Program. The program aims to protect and breed the most endangered mammals in the central desert region and provide a release program back into the wild.	Tourism NT
NT	Larapinta Trail	Opportunity for commercial accommodation and associated infrastructure along the Larapinta Trail as highlighted in the park plan of management.	Tourism NT

State	Park Destination	Partnership Opportunity	Contact
NT	Nitmiluk National Park	Opportunity for development of a wilderness resort at Pelican Point on the Katherine River. Safari style cabins, walking tracks into the stone country and a sandy beach within the area have been considered. [Note: The viability of the development still needs to be examined in detail and consultation required.]	Tourism NT
NT	Mary River Wetlands and Wildman National Parks NT	Opportunity to redevelop the Wildman River Wilderness Lodge 170kms south east of Darwin as a four and half star tourism facility in partnership with IBA. The redeveloped resort will consist of approximately 30 to 40 rooms and offer a high quality tourism experience. Proposed activities include boat tours of the wetlands, barramundi fishing charters, 4 wheel drive tours of the wetlands and various other tours to attractions within Kakadu National Park and the surrounding region.	Indigenous Business Australia
QLD	Fraser Island Visitor Infrastructure	The Sustainable Visitor Capacity (SVC) Working Group, comprising QPWS, tourism industry, traditional owners and community representatives has recommended a range of facility upgrades and improvements on Fraser Island National Park.	QPWS
QLD	Hervey Bay Whale Watching	Opportunity to fund research of the design criteria for new whale-watching vessels which meet best practice design and enhance the visitor experience under a new sustainable management between QPWS and Hervey Bay whale watching operators.	QPWS
QLD	Mossman Gorge Daintree National Park	Opportunity for the development of a range of visitor facilities and a people movement system to provide more sustainable access for visitors to Mossman Gorge.	QPWS
QLD	Cape York Bush Camping Strategy	Opportunity for the development of a partnership between Traditional Owners, the QPWS, the tourism industry, local government and local landholders, to provide sustainable bush camping opportunities for visitors to Cape York. Project involves preparation of a detailed bush camping strategy for Cape York National Parks, Aboriginal Lands, and freehold and leasehold lands to meet the needs of both the independent and commercial 4WD touring market. The aim of the strategy is to reduce the adverse environmental, social and cultural impact of uncontrolled bush camping on the Cape.	QPWS
WA	Various	A number of projects are currently being progressed under the State's Land Bank initiative.	DEC WA
SA	Various	A number of projects are currently being reviewed under the State's Visitor Management Strategy.	DEH SA

# Natural Tourism Partnerships Action Plan

Creating effective public-private  
partnerships for natural tourism and  
conservation in Australian Parks



## From the TTF Australia Team

The development of the Natural Tourism Partnerships Action Plan has been a labour of love for the TTF team over the past 18 months. We all share a passion for the tourism industry, for our parks, and for the protection of our environment. While the launch of this report is an important milestone, there is still much more work to be done, and we remain committed to seeing the recommendations of the report implemented around Australia.



On behalf of the TTF team, I'd like to thank everyone who contributed to the development of this Action Plan, and particularly our partners in the Federal, State and Territory governments. I look forward to working with you in the future.

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