Parliament of Victoria

Environment and Natural Resources Committee

*Inquiry into heritage tourism and ecotourism in Victoria*


This report is printed on Revive Laser 90 gsm – 100 per cent recycled paper
Table of contents

List of figures ........................................................................................................................................ iv
List of tables .......................................................................................................................................... iv
Committee members .......................................................................................................................... v
Staff ................................................................................................................................................ v
Terms of reference .......................................................................................................................... vii
Chair’s foreword ................................................................................................................................. ix
Executive summary ........................................................................................................................... xi
Recommendations .................................................................................................................................. xv
Acronyms and abbreviations ............................................................................................................ xxiii

INTRODUCTION ................................................................................................................................. 1
The inquiry into heritage tourism and ecotourism in Victoria .................................................. 1

CHAPTER ONE ...................................................................................................................................... 3
Victoria’s heritage tourism and ecotourism industry ............................................................... 3

1.1 Defining ecotourism ..................................................................................................................... 3
1.2 Defining heritage tourism ........................................................................................................... 7
1.3 Indigenous heritage in Victoria’s tourism industry ................................................................. 9
1.4 Victoria’s natural and cultural heritage attractions ................................................................. 10
1.5 ‘Iconic’ sites and heritage listing ............................................................................................. 12
1.6 Recent developments in tourism policy .................................................................................. 13
  1.6.1 Victoria’s 2020 tourism strategy ......................................................................................... 13
  1.6.2 Victoria’s regional tourism strategy 2013-2016 ................................................................. 15
  1.6.3 Victoria’s China tourism strategy ....................................................................................... 17
  1.6.4 Victoria’s Aboriginal tourism strategy 2013-2023 ............................................................ 17
  1.6.5 Victoria’s Trails Strategy 2014-24 ..................................................................................... 18
1.7 National parks policy and legislation ....................................................................................... 19
1.8 Heritage tourism policy ............................................................................................................ 21
1.9 National tourism policy ............................................................................................................ 22
1.10 The contribution of tourism to the national and Victorian economies ............................ 23
1.11 Recent tourism data on Victoria – International visitation .................................................. 26
1.12 Recent tourism data on Victoria – Domestic visitors .......................................................... 30

CHAPTER TWO ...................................................................................................................... 35

Developing the potential within the ecotourism and heritage tourism industry .... 35

2.1 Governance structures and the Victorian tourism industry ........................................... 35
   2.1.1 The role of Regional Tourism Boards ................................................................... 35

2.2 Marketing Victoria’s assets .............................................................................................. 38
   2.2.1 Tourism Victoria’s promotional campaigns .......................................................... 38
   2.2.2 The role of social media ...................................................................................... 41

2.3 Encouraging regional dispersal ...................................................................................... 44

2.4 Meeting the expectations of international visitors .......................................................... 46

CHAPTER THREE ............................................................................................................... 53

Infrastructure for ecotourism and heritage tourism and workforce skills and development .................................................................................................................. 53

3.1 Tourism infrastructure policy context ........................................................................... 53

3.2 Infrastructure for ecotourism and heritage tourism ...................................................... 54
   3.2.1 Accommodation .................................................................................................. 61
   3.2.2 Signage ............................................................................................................... 66
   3.2.3 Technological Infrastructure .............................................................................. 69

3.3 Workforce skills and development .................................................................................. 72

CHAPTER FOUR .................................................................................................................. 77

Best practice in ecotourism ................................................................................................. 77

4.1 Victoria’s licensing scheme ............................................................................................ 77
   4.1.1 Views of stakeholders ......................................................................................... 79

4.2 Ecotourism accreditation schemes ................................................................................ 81
   4.2.1 Views of stakeholders ......................................................................................... 83
   4.2.2 International eco-accreditation schemes .............................................................. 88

4.3 Ecotourism and commercial developments in national parks ..................................... 93
   4.3.1 Views of stakeholders ......................................................................................... 95
   4.3.2 Models of best practice in other jurisdictions ..................................................... 99

4.4 Funding sustainable ecotourism development .............................................................. 109
   4.4.1 Attracting investors to the ecotourism sector ...................................................... 109
4.4.2. Revised fees for accommodation in Victorian parks ............................................ 111
4.4.3. Funding iconic walking tracks .............................................................................. 112
4.5 Ecotourism policy ................................................................................................... 114

CHAPTER FIVE .......................................................................................... 121

Best practice in heritage tourism ............................................................................. 121
5.1 Heritage tourism within the cultural tourism sector ............................................. 122
5.2 Interpreting heritage sites...................................................................................... 125
  5.2.1 Digital technologies ..................................................................................... 127
5.3 Heritage workforce skills and tour guides.............................................................. 133
5.4 Heritage buildings and tourism opportunities ....................................................... 135
  5.4.1 The planning system and heritage overlays .................................................... 136
  5.4.2 Adaptive re-use of heritage buildings ........................................................... 137
  5.4.3 Funding heritage preservation and tourism projects ....................................... 139

CHAPTER SIX ........................................................................................... 143

Supporting Aboriginal tourism ............................................................................ 143
6.1 Victoria’s Aboriginal tourism policy ....................................................................... 143
  6.1.1 Aboriginal tourism in other Australian jurisdictions ....................................... 144
6.2 Aboriginal heritage in Victoria’s national parks ..................................................... 145
6.3 Victoria’s potential as an Aboriginal tourism destination ...................................... 148
  6.3.1 Visitor expectations and cultural authenticity ............................................... 150
  6.3.2 Tourism and ‘difficult’ heritage ...................................................................... 151
6.4 Supporting Aboriginal tourism ventures................................................................. 153
  6.4.1 Product development and ‘market readiness’ in British Columbia .................. 153
  6.4.2 Tourism and Registered Aboriginal Parties .................................................... 155
  6.4.3 Partnerships and the sustainability of Aboriginal tourism ventures ............... 156
6.5 Aboriginal tourism and accreditation .................................................................... 158
  6.5.1 Cultural awareness in the Hawaiian tourism industry ..................................... 159

CHAPTER SEVEN ...................................................................................... 161

Victoria as a leader in ecotourism and heritage tourism ........................................ 161
  7.1. UNESCO World Heritage Listings ..................................................................... 161
  7.2. Bridging ecotourism and heritage tourism through inter-agency cooperation ... 165
APPENDIX ONE .......................................................................................................... 171
List of submissions ........................................................................................................ 171

APPENDIX TWO ......................................................................................................... 175
List of public hearings ..................................................................................................... 175

APPENDIX THREE ....................................................................................................... 181
List of briefings and site inspections................................................................................ 181

BIBLIOGRAPHY .......................................................................................................... 185

List of figures

Figure 3.1 Tourist Road Signs........................................................................................ 67
Figure 5.1 Melbourne’s Lost 100 App ........................................................................... 129
Figure 5.2 Heritage Victoria ‘Vic Heritage’ app and QR code at the Australian Museum, Sydney................................................................. 130

List of tables

Table 1.1 International Overnight Visitation Estimates to Victoria
Years ending March 2010, 2013, 2014 ...................................................................... 26
Table 1.2 International Overnight Visitation Estimates to Victoria by Campaign Region Years ending March 2010, 2013, 2014 ......................................................... 27
Table 1.3 International Expenditure in Victoria
Years ending March 2010, 2013, 2014 .................................................................... 28
Table 1.4 International Visitation Estimates to Victoria by Origin:
Top 10 Source Countries Years ending March 2013-2014 .......................................... 29
Table 1.5 Domestic Overnight Visitor Estimates to Victoria
Years ending March 2010, 2013, 2014 .................................................................... 30
Table 1.6 Domestic Overnight Visitor Estimates to Victoria by Campaign Region
Years ending March 2010, 2013, 2014 .................................................................... 31
Table 1.7 Domestic Expenditure in Victoria
Years ending March 2010, 2013, 2014 .................................................................... 32
Table 1.8 Domestic Overnight Visitor Estimates to Victoria by Origin:
Years ending March 2010, 2013, 2014 .................................................................... 33
Committee members

This inquiry was conducted during the term of the 57th Parliament.

The Members of the Environment and Natural Resources Committee are:

- Mr David Koch, MLC (Chair);
- Hon. John Pandazopoulos, MP (Deputy Chair);
- Mr Tim Bull, MP (until March 2014);
- Ms Joanne Duncan, MP;
- Mr Danny O’Brien, MLC (from April 2014); and,
- Ms Lorraine Wreford, MP.

Staff

For this inquiry, the Committee was supported by a Secretariat comprising:

- Executive Officer: Dr Gregory Gardiner
- Office Managers: Ms Karen Taylor, Mr Justin Elder
- Research Officer: Dr Kelly Butler
Terms of reference

That, under s33 of the Parliamentary Committees Act 2003, an inquiry into matters relating to heritage tourism and ecotourism in Victoria be referred to:

The Environment and Natural Resources Committee for consideration and report no later than 31 May 2014, with particular reference to:

(1) examining the current scope of ecotourism and heritage tourism in Victoria, including the extent to which the current arrangements maximise the benefits to the local industry;

(2) examining best practice in ecotourism and heritage tourism;

(3) examining the potential for the development of ecotourism and heritage tourism in Victoria;

(4) determining the environmental and heritage issues associated with large scale tourism; and

(5) determining whether the local industry is sufficiently advanced to manage increased tourism and any obstacles to this.

*Note: the reporting date was extended to 29 August 2014 by resolution of the Legislative Assembly, 4 February 2014.

Votes and Proceedings of the Legislative Assembly of Victoria

No. 88 — Tuesday 28 August 2012
Chair’s foreword

The Environment and Natural Resources Committee (ENRC) received a reference for consideration and report on matters relating to heritage tourism and ecotourism in Victoria, on 28 August 2012. Under the terms of reference, the Committee was tasked with examining the current scope of ecotourism and heritage tourism, the potential for the development of ecotourism and heritage tourism, and determining whether the local industry was sufficiently advanced to manage increased tourism. The Committee was also required to examine best practice in ecotourism and heritage tourism, and the environmental and heritage issues associated with large scale tourism.

In total, the inquiry received 92 submissions. The inquiry was conducted with public hearings and site inspections undertaken around the state. In Victoria, public hearings were held in Ballarat, Port Campbell, Lakes Entrance, Halls Gap, and Mansfield, while three days of public hearings took place in Melbourne. Site inspections were conducted in the Goldfields region, the Great Ocean Road, East Gippsland, Mansfield and the High Country, the Grampians region, and Point Nepean. The Committee also visited Tasmania, where it undertook site inspections at Cradle Mountain, the heritage town of Oatlands, in Hobart, and at Port Arthur. The Committee also travelled overseas. The study tour of North America was invaluable for the Committee in understanding global best practice in ecotourism and heritage tourism, and the Committee met with leaders in the field in each of its destinations, and conducted site inspections.

I would like to thank all those who made submissions to the inquiry, or attended public hearings as witnesses, particularly those who travelled from interstate. I also wish to sincerely thank those local agencies, departmental officials, industry and community groups that hosted the Committee on its Victorian site inspections. I thank the Parks and Wildlife Service of Tasmania for so successfully hosting the Committee’s short but valuable visit. I also extend my thanks to Mr Michael Kapel, Victorian Commissioner to the Americas, and Ms Libby Ferguson from the Victorian Government Business Office, for their assistance with planning and organising the North American study tour schedule.

As this report of the Committee demonstrates, ecotourism and heritage tourism are both key and growing sectors of the tourism market and have the potential to significantly contribute to the Victorian economy. Victoria has outstanding natural and heritage assets, upon which the state can build a sustainable tourism industry, and provide opportunities for local employment. There are currently infrastructure shortfalls and work skills and training capacity issues across the state that need to be addressed. However, with a modern integrated approach to the management of key destinations, including the use of digital technologies, and an understanding of the demands of contemporary eco and heritage tourism, Victoria can become a leader in these sectors.

I wish to acknowledge and thank my parliamentary colleagues on the Committee for their commitment to this inquiry and their fine work throughout the inquiry process: Deputy Chair, Hon John Pandazopoulos MP, Mr Tim Bull MP (until 17 March 2014), Ms Joanne Duncan MP, Ms Lorraine Wreford MP and Mr Danny O’Brien MLC (from 2 April 2014).
I would also like to acknowledge the excellent work of the Committee Secretariat. My thanks to Executive Officer, Dr Greg Gardiner, Research Officer, Dr Kelly Butler, and Office Managers, Ms Karen Taylor and Mr Justin Elder, for their ongoing support and dedication to the task throughout this inquiry.

Mr David Koch, MLC
Chair
Executive summary

Introduction

The introduction to the report provides a background to the inquiry, including its terms of reference. It provides an overview of the inquiry process, detailing public hearings held, submissions received, site inspections conducted, and the various groups consulted and heard throughout the inquiry.

Chapter One: Victoria's heritage tourism and ecotourism industry

Chapter One discusses the varying definitions of ecotourism and heritage tourism, and provides an overview of current government policy relating to the tourism sector. It focuses on term of reference one, which instructs the Committee to examine ‘the current scope of ecotourism and heritage tourism in Victoria’. Latest data on Victorian tourism are included. This chapter provides a background discussion to the inquiry.

Chapter Two: Developing the potential within the ecotourism and heritage tourism industry

Chapter Two discusses factors identified by the inquiry’s stakeholders as important to nurturing the potential of Victoria’s ecotourism and heritage tourism industries. These factors include: the effectiveness of current industry governance structures, especially Regional Tourism Boards; approaches to destination marketing; boosting visitation to regional areas; and, engaging with the needs of international visitors.

This chapter addresses terms of reference one, three and five, namely: ‘examining the current scope of ecotourism and heritage tourism in Victoria, including the extent to which the current arrangements maximise the benefits to the local industry’; ‘examining the potential for the development of ecotourism and heritage tourism in Victoria’; and, ‘determining whether the local industry is sufficiently advanced to manage increased tourism and any obstacles to this.’ The chapter makes a number of recommendations.

Chapter Three: Infrastructure and the capacity of local industry

Chapter Three provides discussion on the current state of tourism infrastructure and the capacity of local industry to develop and deliver heritage tourism and ecotourism products across Victoria. It is concerned with evidence suggesting that there are significant infrastructure shortfalls in the state, and skills and training shortages in some areas. The discussion of infrastructure also includes an examination of tourism needs in accommodation, signage and technological infrastructure, followed by a section focused on workforce skills and development.

The chapter responds to terms of reference three and five, namely: ‘examining the potential for the development of ecotourism and heritage tourism in Victoria’; and, ‘determining whether the local industry is sufficiently advanced to manage increased tourism and any obstacles to this’. The
chapter makes a number of recommendations to enhance ecotourism and heritage tourism infrastructure across the state.

**Chapter Four: Best practice in ecotourism**

Chapter Four discusses best practices in ecotourism, drawing on evidence and examples from within Australia and overseas. It provides an overview of Victoria’s licensing scheme for tourism operators, and examines ecotourism accreditation schemes. The issue of commercial development in national parks is covered in detail, followed by a section on the funding of sustainable ecotourism development. It concludes by examining the need for a renewal of policy in this area.

The chapter addresses term of reference two, ‘examining best practice in ecotourism and heritage tourism’, also relates to term of reference three, ‘examining the potential for the development of ecotourism and heritage tourism in Victoria’, and addresses term of reference four, ‘determining the environmental and heritage issues associated with large scale tourism’. The chapter makes a number of recommendations designed to enhance the ecotourism sector in Victoria. The success of ecotourism in Victoria will rely heavily on the partnership between government and the private sector.

**Chapter Five: Best practice in heritage tourism**

This chapter focuses on term of reference two, ‘examining best practice in ecotourism and heritage tourism’. Heritage tourism is a broad sector that includes a range of operators, sites and activities, such as historic house museums, community museums, historical societies and preservationist groups, heritage railways, walking tours, historical ruins, and natural heritage sites. Heritage tourism is managed by Victorian Government policy as part of the wider cultural tourism sector.

The majority of stakeholders understand heritage tourism as relating to historic places and objects, rather than to artistic displays or cultural performances. This chapter suggests that the Victorian Government’s cultural tourism strategy requires renewal, and should include a stronger focus on heritage tourism. The chapter makes a number of recommendations designed to enhance the heritage tourism sector in Victoria.

**Chapter Six: Supporting Aboriginal tourism**

Chapter Six discusses the particular needs of Aboriginal tourism in Victoria, which the Committee regards as having strong links to both heritage tourism and ecotourism. Aboriginal culture is a key drawcard for international visitors to Australia, and Victoria is well-placed to capitalise on this demand. The Victorian Government’s recent Aboriginal tourism strategy views Aboriginal tourism as a method for increasing the regional dispersal of visitors, but also seeks to develop Melbourne as a destination known for providing accessible Aboriginal experiences.
The Committee found that there was great interest amongst industry organisations and Indigenous groups in developing Aboriginal tourism, and a strong awareness of international best practice in the Indigenous tourism sector. This chapter addresses term of reference two, namely: ‘examining best practice in ecotourism and heritage tourism’. There is enormous potential to grow the sector and develop engaging and ‘authentic’ Indigenous tourism experiences. A number of recommendations are made, including the need for the development of a showcase Aboriginal tourism destination in regional Victoria.

**Chapter Seven: Victoria as a leader in ecotourism and heritage tourism**

Chapter Seven discusses how Victoria can become a leader in ecotourism and heritage tourism in Australia, and internationally. This chapter addresses term of reference three, namely: ‘examining the potential for the development of ecotourism and heritage tourism in Victoria’.

The chapter focuses on three key initiatives designed to support the development of more integrated and engaging ecotourism and heritage tourism experiences, which are: the need to prioritise World Heritage listings for major sites; a strategy of tourism development to successfully combine the potential of the heritage tourism and ecotourism markets; and the importance of inter-agency collaboration in achieving the aim of making Victoria a leader in ecotourism and heritage tourism. The chapter makes a number of recommendations.
Recommendations

Chapter Two: Developing the potential within the ecotourism and heritage tourism industry

RECOMMENDATION 2.1
The Victorian Government commit to providing recurrent operational funding to support Regional Tourism Boards sufficient for them to carry out their expanded functions as recommended by this Committee. In addition, Tourism Victoria will monitor the performance of the new Regional Tourism Boards, with a view to ensuring that the organisations are fulfilling their responsibilities and are appropriately resourced.

RECOMMENDATION 2.2
Tourism Victoria, in consultation with the Regional Tourism Boards, regularly updates the content of the Jigsaw campaign to effectively highlight and promote Victoria’s ecotourism and heritage tourism attractions.

RECOMMENDATION 2.3
Tourism Victoria in concert with the Department of State Development Business and Innovation and the Victoria Tourism Industry Council work with Regional Tourism Boards to ensure that all Victorian tourism operators have the knowledge and skills — such as through the Tourism Excellence Program — to effectively use social media platforms to promote their ecotourism and heritage products, and engage with visitors.

RECOMMENDATION 2.4
Tourism Victoria work with Regional Tourism Boards, the Victoria Tourism Industry Council and local tourism operators to identify market-ready ecotourism and heritage products within Victoria’s regions, and develop regional promotional materials that showcase these attractions.

RECOMMENDATION 2.5
Tourism Victoria specifically develops promotional materials for international markets that highlight Victoria as a leading destination for ecotourism and heritage experiences.

RECOMMENDATION 2.6
Tourism Victoria works with Regional Tourism Boards to ensure that local tourism operators are aware of international visitor satisfaction research, and the demand from Chinese visitors for nature-
based experiences. Tourism Victoria will also continue to offer China readiness programs to assist operators to tailor their products to meet the expectations of this growing sector. 

**RECOMMENDATION 2.7**

Tourism Victoria works with Regional Tourism Boards to engage tourism-dependent businesses to provide welcoming and culturally appropriate services to international visitors. Tourism Victoria will offer their China readiness programs to operators in the hospitality, accommodation and retail sectors.

**Chapter Three: Infrastructure for ecotourism and heritage tourism and workforce skills and development**

**RECOMMENDATION 3.1**

Regional Tourism Boards collaborate with local heritage and ecotourism operators, Parks Victoria, Tourism Victoria, relevant Victorian Government departments, local government, the Victoria Tourism Industry Council, and other stakeholders to identify infrastructure priorities that will enhance the development and sustainable growth of ecotourism and heritage tourism in their regions.

- Once identified, these infrastructure priorities will become part of each region’s destination management plan.

**RECOMMENDATION 3.2**

The Victorian Government assist in the funding and/or facilitation of regionally identified infrastructure priorities that will enhance the development and sustainable growth of ecotourism and heritage tourism across the state.

- Large-scale infrastructure projects, such as interpretation centres at iconic destinations, should be appropriately maintained.

**RECOMMENDATION 3.3**

Regional Tourism Boards (RTBs), working with local providers of heritage and ecotourism products, chambers of commerce, councils, Parks Victoria, and Tourism Victoria, the Victoria Tourism Industry Council, and other stakeholders, will identify accommodation gaps currently constraining the development and sustainable growth of ecotourism and heritage tourism in their regions.

- In their destination management plans RTBs will include the means by which such gaps could be redressed, including proposals for facilitating private investment.

**RECOMMENDATION 3.4**

Regional Tourism Boards (RTBs) identify gaps in directional and interpretive signage within each tourism region, and coordinate improvements to signage. In doing so RTBs should take the advice of key agencies, such as VicRoads, Parks Victoria, Heritage Victoria and Tourism Victoria, and
collaborate with local government, heritage and ecotourism operators, historical associations, and other relevant stakeholders to create a coherent themed approach to signage.

RECOMMENDATION 3.5

The Victorian Government work with the federal government, local governments, local industry representatives and telecommunications providers to improve the standard of telecommunications in Victoria’s regions, with particular attention to eliminating the state’s identified mobile black spots.

RECOMMENDATION 3.6

Regional Tourism Boards are best placed to identify the skills and training shortages in the regions, and should map their regions accordingly, in collaboration with local ecotourism and heritage tourism operators, the Victoria Tourism Industry Council, local councils and Tourism Victoria.

- Tourism Victoria should make training programs, such as the Tourism Excellence Program, and China-ready programs, accessible to regional operators, by delivering programs in regional centres, and online.

Chapter Four: Best practice in ecotourism

RECOMMENDATION 4.1

In the short term, while ecotourism is an emerging industry, Parks Victoria be funded to maintain a dedicated subsidy program to support nature-based and ecotourism operators on public lands gain eco-accreditation.

RECOMMENDATION 4.2

Tourism Victoria should create a promotional and marketing rewards program for nature-based and ecotourism operators who achieve eco-certification. The program will provide such operators with a higher profile in campaigns and other materials.

RECOMMENDATION 4.3

In assessing licence applications from tour operators in national parks, and determining the length of such licences, Parks Victoria will continue to give preference to those operators who possess accreditation. In particular, in highly sensitive areas of national parks that are the focus of ecotourism, Parks Victoria will issue licences only to operators who are eco-accredited.

Regional Tourism Boards (RTBs) work with the Victoria Tourism Industry Council to promote the benefits of accreditation to nature-based and ecotourism operators and businesses in their regions. In addition, RTBs will provide information to operators and businesses on how to gain access to an accreditation subsidy program.

RECOMMENDATION 4.4

The Victorian Government should take a proactive role in identifying and preparing sites in national parks that can be developed sustainably and appropriately by private investors. Parks Victoria will
take a lead role in this process, collaborating with the Department of Environment and Primary Industries, Tourism Victoria, Regional Tourism Boards, local government, and industry groups and operators.

- A priority area for commercial attraction should be the development of eco-accredited lodge accommodation to support the state’s iconic walks.

**RECOMMENDATION 4.5**

The Victorian Government refine the expression of interest (EOI) process for attracting commercial development in the state’s national parks. Master plans for commercial developments within national parks will set out strict guidelines for proposals, based on a ‘triple-bottom-line’ of environmental, social and economic sustainability. All proposals for commercial development should be independently audited by environmental auditors prior to approval.

- Parks Victoria will ensure that all commercial developments in national parks are audited on a regular basis to ensure their compliance with lease and licence agreements.

**RECOMMENDATION 4.6**

In developing the state’s iconic walks, the Victorian Government should give consideration to a ‘two experience’ model so that the broadest range of visitors can have access to, and enjoyment of these destinations.

- This model typically includes the provision of both public facilities such as huts and camping sites and privately owned and managed eco-lodge accommodation.

**RECOMMENDATION 4.7**

Tourism Victoria, in conjunction with the Regional Tourism Boards and the Victoria Tourism Industry Council, develops an investment attraction initiative to support the ecotourism sector. The program will assist investors interested in financing ecotourism developments throughout Victoria and, where appropriate, guide investors towards Parks Victoria’s expression of interest process for development in national parks.

**RECOMMENDATION 4.8**

The Victorian Government will ensure that the income derived from camping fees, parks, accommodation and commercial leases is hypothecated to the parks system.

- The Victorian Government explore the introduction of walkers’ fees to fund the construction and maintenance of iconic walking tracks within the state’s national parks. These fees will be hypothecated to fund individual tracks.
RECOMMENDATION 4.9
The Victorian Government renew its approach to nature-based tourism by developing a long-term nature-based tourism strategy for Victoria that specifically addresses and emphasises the development of the state’s ecotourism sector, underpinned by the principles of sustainability.  

Page 120

Chapter Five: Best practice in heritage tourism

RECOMMENDATION 5.1
Tourism Victoria renews its cultural tourism policy, in conjunction with Heritage Victoria and Arts Victoria, and includes within it a dedicated focus on the heritage tourism sector. The policy will develop a framework for cooperation between Tourism Victoria and Heritage Victoria designed to support heritage operators to deliver world class tourism experiences.  

Page 125

RECOMMENDATION 5.2
Tourism Victoria and Heritage Victoria collaborate in developing guidelines to assist operators with the interpretation of Victoria’s heritage in a tourism context, building on Victoria’s Framework of Historical Themes.

- These guidelines should — in conjunction with the Department of State Development Business and Innovation — include advice on the appropriate use of digital technologies for heritage interpretation.  

Page 133

RECOMMENDATION 5.3
The Victorian Government fund a grants program to expand the development of digital interpretation for heritage tourism.

- In addition, Heritage Victoria will work with Tourism Victoria to strengthen the tourism focus of the ‘Vic Heritage’ smartphone app to include more sites throughout the state.  

Page 133

RECOMMENDATION 5.4
Tourism Victoria, Heritage Victoria, Regional Tourism Boards and the Victoria Tourism Industry Council work together to develop appropriate training modules for staff and volunteers working within the heritage tourism sector.

- Training modules should have a focus on developing skills in heritage interpretation and storytelling for tour guides. These could become part of the existing Tourism Excellence Program.

- The Victorian Government should provide funding to support heritage tourism staff and volunteers to participate in relevant training opportunities.  

Page 135
RECOMMENDATION 5.5

The Victorian Government draws on the Community Support Fund to support community organisations and local councils to fund heritage tourism projects. Funded projects will have a clear focus on supporting heritage tourism, not simply on conserving or restoring heritage buildings.  

Page 141

RECOMMENDATION 5.6

The Victorian Government works with Heritage Victoria, Tourism Victoria, and local government to develop incentives, or remove disincentives, for private owners to restore and maintain heritage buildings and structures for tourism use. Incentives can includes heritage awards programs, small grants and/or planning or taxation concessions.  

Page 142

Chapter Six: Supporting Aboriginal tourism

RECOMMENDATION 6.1

Parks Victoria work with the Victorian Aboriginal Heritage Council and Registered Aboriginal Parties to develop a framework to guide the interpretation of Aboriginal heritage throughout Victoria’s public lands reserve.  

Page 148

RECOMMENDATION 6.2

The Victorian Government should investigate establishing a showcase Aboriginal tourism destination in regional Victoria, including preparing an appropriate business case.  

Page 157

RECOMMENDATION 6.3

Tourism Victoria supports both long-established and newly developed Aboriginal tourism ventures to develop ‘market ready’ tourism experiences and to effectively promote their tourism products.

- Tourism Victoria should explore ways to further highlight Aboriginal tourism within the agency’s online marketing materials, investigating the introduction of an Aboriginal tourism portal that supports the direct online booking of Aboriginal tourism experiences.  

Page 158

RECOMMENDATION 6.4

The Victorian Government funds Tourism Victoria to work with the Victorian Aboriginal Heritage Council and appointed Registered Aboriginal Parties to support the development of Aboriginal tourism products and experiences throughout the state.

- In supporting Aboriginal tourism businesses there should be a focus on capacity building and workforce training.  

Page 158
RECOMMENDATION 6.5

Tourism Victoria works with the Victorian Aboriginal Heritage Council and appointed Registered Aboriginal Parties to increase awareness of Aboriginal heritage values within the tourism industry.

- Further, consideration should be given to the development of guidelines for the tourism industry to consult with Aboriginal people where Aboriginal heritage or stories are to be used in tourism products and ventures operated or delivered by non-Aboriginal people.

Page 160

Chapter Seven: Victoria as a leader in ecotourism and heritage tourism

RECOMMENDATION 7.1

The Victorian Government work with the Australian Government to pursue UNESCO World Heritage Listing for the Castlemaine Diggings National Heritage Park and the Budj Bim National Heritage Landscape.

- In addition, Tourism Victoria in conjunction with both Parks Victoria and Heritage Victoria, will develop a strategy to guide the identification of, and application process for, potential World Heritage sites within the state.

Page 165

RECOMMENDATION 7.2

In developing best practice models of interpretation for iconic destinations and experiences, Tourism Victoria and Parks Victoria will collaborate with, and draw upon the expertise of, other key agencies and stakeholders, such as Heritage Victoria, Regional Tourism Boards, and the Victorian Aboriginal Heritage Council. Where appropriate, collaboration will extend to lease-holders, destination managers, and licensed tour operators.

- Such an interpretive approach will combine ecotourism and heritage tourism in an immersive experience, offering visitors an integrated understanding of a site’s natural and cultural histories and values, including Indigenous heritage.

Page 168

RECOMMENDATION 7.3

The Victorian Government will ensure that the development of interpretation centre infrastructure at iconic destinations — such as at the Shipwreck Coast — occurs on the basis of world’s best practice in interpretation and sustainability.

Page 169

RECOMMENDATION 7.4

As part of an integrated thematic approach to interpreting and promoting natural and cultural heritage sites, Tourism Victoria will consider developing branding to include signposting for the state’s ‘must-see’ iconic sites, in conjunction with the development of a suite of complimentary digital interpretative materials, such as a smartphone app.

Page 169
# Acronyms and abbreviations

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apps</td>
<td>Smartphone applications</td>
</tr>
<tr>
<td>AtBC</td>
<td>Aboriginal Tourism Association of British Columbia</td>
</tr>
<tr>
<td>BTEG</td>
<td>Business and Tourism East Gippsland</td>
</tr>
<tr>
<td>CST</td>
<td>Certification for Sustainable Tourism</td>
</tr>
<tr>
<td>DEPI</td>
<td>Department of Environment and Primary Industries</td>
</tr>
<tr>
<td>DSDBI</td>
<td>Department of State Development, Business and Innovation</td>
</tr>
<tr>
<td>ENRC</td>
<td>Environment and Natural Resources Committee</td>
</tr>
<tr>
<td>GSTC</td>
<td>Global Sustainable Tourism Council</td>
</tr>
<tr>
<td>HEA</td>
<td>Hawaii Ecotourism Association</td>
</tr>
<tr>
<td>ICOMOS</td>
<td>International Council on Monuments and Sites</td>
</tr>
<tr>
<td>LEED</td>
<td>Leadership in Energy &amp; Environmental Design</td>
</tr>
<tr>
<td>LTOs</td>
<td>Licensed tour operators</td>
</tr>
<tr>
<td>M.A.D.E</td>
<td>Museum of Australian Democracy at Eureka</td>
</tr>
<tr>
<td>NaHHA</td>
<td>Native Hawaiian Hospitality Association</td>
</tr>
<tr>
<td>NPS</td>
<td>National Parks Service</td>
</tr>
<tr>
<td>NVS</td>
<td>National Visitor Survey</td>
</tr>
<tr>
<td>PMAV</td>
<td>Prospectors and Miners Association of Victoria</td>
</tr>
<tr>
<td>QR code</td>
<td>Quick response code</td>
</tr>
<tr>
<td>QuEST</td>
<td>Queensland Eco and Sustainable Tourism</td>
</tr>
<tr>
<td>RAPs</td>
<td>Registered Aboriginal Parties</td>
</tr>
<tr>
<td>RTBs</td>
<td>Regional Tourism Boards</td>
</tr>
<tr>
<td>TQCA</td>
<td>Tourism Quality Council of Australia</td>
</tr>
<tr>
<td>TRA</td>
<td>Tourism Research Australia</td>
</tr>
<tr>
<td>UNESCO</td>
<td>United Nations Educational, Scientific and Cultural Organization</td>
</tr>
<tr>
<td>VCEC</td>
<td>Victorian Competition and Efficiency Commission</td>
</tr>
<tr>
<td>VTIC</td>
<td>Victoria Tourism Industry Council</td>
</tr>
</tbody>
</table>
Introduction

The inquiry into heritage tourism and ecotourism in Victoria

On 28 August 2012, the Environment and Natural Resources Committee (ENRC) received a reference for consideration and report on matters relating to heritage tourism and ecotourism in Victoria, with particular reference to:

- Examining the current scope of ecotourism and heritage tourism in Victoria, including the extent to which the current arrangements maximise the benefits to the local industry;
- Examining best practice in ecotourism and heritage tourism;
- Examining the potential for the development of ecotourism and heritage tourism in Victoria;
- Determining the environmental and heritage issues associated with large scale tourism; and
- Determining whether the local industry is sufficiently advanced to manage increased tourism and any obstacles to this.

The Committee was originally due to report by the end of May 2014. However, due to the need to gather further evidence from across Victoria, and the high volume of information provided to the Committee, the report date was amended to 29 August 2014. The inquiry’s public process began in May 2013 by advertising the inquiry and its terms of reference, and inviting submissions, in a number of state and regional newspapers. The Committee’s website was also updated to announce that submissions were being accepted. All public hearings held in regional Victoria and Melbourne were advertised in local media.

Beginning in June 2013, the Committee sent letters inviting submissions to more than 300 stakeholders, including regional tourism boards and associations, local governments, state government departments and key agencies, private tourism operators and businesses, industry groups, heritage and cultural agencies, museums, community groups, and other relevant groups and individuals.

During the course of its inquiry, the Committee heard evidence from a wide range of groups from across Victoria, including industry representatives, state and local government officials, private eco-tour operators, tourism board representatives, heritage agency representatives, Parks Victoria and Tourism Victoria officials, key destination managers, community groups and other interested groups and individuals. The Committee received a total of 92 written submissions to the inquiry from a wide range of stakeholders. For a list of submissions see Appendix One.
The inquiry was conducted with public hearings and site inspections undertaken around the state. In Victoria, public hearings were held in Ballarat, Port Campbell, Lakes Entrance, Halls Gap, and Mansfield. Three days of public hearings also occurred in Melbourne. In preparing this report, the Committee drew heavily on written submissions and the information provided by witnesses. The Committee would like to thank all those who took the time to make a submission to the inquiry, and to all of the witnesses who made themselves available to attend public hearings to speak directly to the Committee. For a full list of public hearings and witnesses who attended see Appendix Two.

Site inspections were also conducted across Victoria. The Committee’s site inspections included: Sovereign Hill at Ballarat, Castlemaine Diggings National Heritage Park at Castlemaine, the Museum of Modern Democracy at Eureka (M.A.D.E), Flagstaff Hill and Maritime Village and Shipwreck Coast Visitors Centre at Warrnambool, the Worn Gundidj Visitor Centre – Tower Hill Wildlife Reserve, Port Campbell National Park, Bothfeet Walking Lodge at Johanna, Point Nepean National Park, the Port Phillip EcoCentre, Cape Conran Coastal Park, Buchan Caves Reserve, the East Gippsland Rail Trail, Lakes Entrance, the Brambuk Cultural Centre at Halls Gap, Grampians-Gariwerd National Park, and the Alpine National Park, including a guided visit to Bluff Hut.

The Committee also visited Tasmania where it conducted site inspections and held a public hearing in Hobart. The Committee visited the Cradle Mountain-Lake Saint Clair National Park, the heritage town of Oatlands, Hobart, and Port Arthur. The Committee would like to thank all of those organisations and individuals who provided their time and expertise in hosting the Committee on its invaluable site inspections. The Committee also travelled overseas. The North American Study Tour was also invaluable for the Committee in understanding global best practice in ecotourism and heritage tourism, and the Committee met with leaders in the field in each of its destinations, and conducted site inspections. The Committee takes this opportunity to thank all of its North American hosts for giving their time, and sharing their knowledge and expertise. A full list of all site inspections can be found at Appendix Three.

In the seven chapters that follow, the Committee addresses each of the inquiry’s terms of reference, provides details of the various views of stakeholders, and makes a number of recommendations. Having reviewed a wide body of evidence, the Committee is of the view that ecotourism and heritage tourism have enormous potential for sustainable growth in Victoria, building upon the advantages of the state’s natural and cultural assets. Indeed, the Committee believes that with the right strategic framework, and the collaboration of key agencies and stakeholders, Victoria should be a national leader in ecotourism and heritage tourism.
Chapter One

Victoria’s heritage tourism and ecotourism industry

This chapter discusses the varying definitions of ecotourism and heritage tourism, and provides an overview of current government policy relating to the tourism sector. It focuses on term of reference one, which instructs the Committee to examine ‘the current scope of ecotourism and heritage tourism in Victoria’.

The Committee heard that both ‘ecotourism’ and ‘heritage tourism’ are variously described and defined, and are often understood as part of the broader categories, respectively, of nature-based tourism and cultural tourism. Unlike some other Australian jurisdictions, the Victorian Government does not currently have dedicated policies for ecotourism and heritage tourism. Heritage tourism is managed as part of the cultural tourism sector, and also as a part of efforts to increase tourism to regional areas. Ecotourism was covered by the Victorian Government’s nature-based tourism policy (which expired in 2012). The Victorian Government considers ecotourism to be part of the nature-based tourism industry.

Victoria’s nature-based and heritage tourism industries are diverse, involving a range of private operators, government agencies and volunteer organisations. There are also a growing number of ecotourism operators that participate in various eco-accreditation schemes, as well as a small Indigenous tourism sector. Current data suggests that tourism is a growing sector of the Victorian economy and that the state has a number of internationally-recognised ‘iconic’ attractions attracting robust visitor numbers. The Committee is of the view that Victoria has a range of unique natural and cultural heritage assets and has the potential to become a leader in the areas of ecotourism and heritage tourism. Overall, this chapter outlines the current state of the ecotourism and heritage tourism industry, and offers a discussion of the state and national policy contexts supporting the sector.

1.1 Defining ecotourism

Ecotourism is understood by some stakeholders — particularly accreditation groups — as a distinct part of the tourism sector. Others, notably government agencies and industry representative groups, view ecotourism as part of the broader phenomenon of nature-based tourism, and as such should be discussed and promoted as a sub-set of this form of tourism. The views of tourism operators are mixed, with some arguing that ecotourism is a niche activity that should be accompanied by accreditation, while others simply use the term ‘eco’ synonymously with ‘nature’.

Ecotourism Australia, the main accreditation agency for Australian ecotourism ventures, defines ‘ecotourism’ as:
Ecologically sustainable tourism with a primary focus on experiencing natural areas that fosters environmental and cultural understanding, appreciation and conservation.¹

In this way ecotourism is considered to have an educative component whereby visitors learn about the environment and aim to minimise the impact of their visit on the local area.

Internationally, ecotourism is often linked to community development, with tourists encouraged to engage with and learn from local and Indigenous cultures. Accordingly, the International Ecotourism Society defines ecotourism as ‘responsible travel to natural areas that conserves the environment and improves the well-being of local people’.² Other organisations prefer to use the concept of ‘sustainable tourism’, such as the Global Sustainable Tourism Council, which has developed a range of criteria to measure sustainability that focuses on the environmental, cultural and economic impacts of tourism.³ The United Nations World Tourism Organization has also developed a code of ethics for sustainable tourism ‘to help maximise the sector’s benefits while minimising its potentially negative impact on the environment, cultural heritage and societies across the globe’.⁴

Ecotourism is often viewed as a niche activity involving limited visitor numbers in remote or unique natural areas, and generally involves high expenditure on the part of the visitor. The Hawaii Ecotourism Association notes that using an ecotourism model will often mean fewer visitors can be accommodated at a particular site.⁵ Ecotourism is often understood to target a narrowly defined group of potential customers, but can result in higher yields for owners and operators as these visitors have a higher spending capacity. At the same time sustainable tourism practices can also mean that operators can actually increase the capacity of a site if visitors are educated on how to minimise their impact on a site (for example, by keeping a certain distance from animals or sensitive natural areas). Ecotourism and sustainable tourism principles can also lead to resource recovery in areas that have been damaged by over use.⁶

To be considered part of the ecotourism sector the majority of operators will undergo training to gain certification through an accreditation scheme, such as those offered by Ecotourism Australia and recognised by the Australian Government’s T-QUAL program.⁷ Accredited ecotourism ventures typically follow a number of sustainability principles including leave-no-trace practices in

---

¹ Ecotourism Australia, submission no. 15, p. 1.
natural areas, the use of energy-saving appliances and waste reduction activities. Internationally, there are a number of competing schemes, such as Canada’s GreenStep program, the UK’s Green Tourism Business Scheme or New Zealand’s Qualmark Enviro Awards. These schemes generally involve a rating system whereby participating businesses are regularly audited and awarded a ‘rating’ according to the organisation’s sustainability criteria. For example, businesses that are part of the Green Tourism Business Scheme — versions of which operate in both Canada and the UK — undergo auditing every two years and receive either a ‘Gold’, ‘Silver’ or ‘Bronze’ rating. Between audits businesses receive information and support to improve their business practices, and possibly raise their rating at the next assessment. Alongside programs like the Green Tourism Business Scheme, the Global Sustainable Tourism Council aims to provide consistency between nationally-based accreditation programs by offering a benchmarking system to enable comparisons between different schemes. The issue of accreditation schemes is discussed further in Chapter Four in relation to best practice within the ecotourism sector.

In their submission to the inquiry ecotour operator Bothfeet takes an expansive view of ecotourism to include anyone who ‘provides a nature-based experience, either on private or crown land, either guided or self-guided’. This definition is based on the idea that for these operators ‘the environment is a core component of their business that needs to be considered throughout their operations’. While this definition is broad, Bothfeet takes the view that all nature-based operators should incorporate sustainability principles into their work and should aim to acquire formal eco-accreditation.

Although there are growing numbers of certified ecotourism ventures within Australia, some witnesses suggested that nature-based tourism operators are unsure of the meaning of ecotourism and the potential to position their business as part of the sector. At a public hearing in Lakes Entrance, Mr Phillip Rickards, Tourism Coordinator at East Gippsland Shire Council, argued that a ‘lot of the nature based operators do not really see value in ecotourism’. In response to this Mr Rickards suggested:

[T]hat if the definition of ecotourism is broadened to a degree so that it can include nature based tourism as a whole, not only will it mean that the nature based tourism operators will be able to understand the opportunities and good outcomes but also they will be able to potentially take on themselves some of the accreditation that currently applies to ecotourism operators.

Some operators who were aware of the term preferred to position their businesses in other ways. For example, Mr Peter Johnstone, an operator based in Lakes Entrance, stated that:

---

10 Bothfeet, submission no. 57, p. 1.
11 Ibid., p. 1.
12 Mr P Rickards, Tourism Coordinator, East Gippsland Shire Council, Environment and Natural Resources Committee public hearing – Lakes Entrance, 5 December 2013, transcript of evidence, p. 183.
I have some concerns about the term ‘ecotourism’. When I use that term, people look at me and yawn a bit. I prefer to use the term ‘eco adventure tourism’. I think adventure tourism is an important part of ecotourism. Ecotourism is the experience ... but to me adventure tourism is the way you carry out that experience, and I think that is an important part of the process.  

Rather than focusing on ecotourism as a distinct category, the Victorian Government has shaped tourism policy around the broad concept of ‘nature-based tourism’. In their submission to the inquiry, Tourism Victoria defined nature-based tourism to include a wide range of activities relating to nature, such as visiting national and state parks, zoos and wildlife parks, aquariums, botanic gardens, bushwalking, whale and dolphin watching, snorkelling and scuba diving. This definition is only concerned with tourism and activities taking place in natural areas, and does not confine itself to issues relating to sustainability and conservation. The Victoria Tourism Industry Council (VTIC) also supports a broad approach to nature-based tourism rather than an exclusive focus on ecotourism. Ecotourism Australia is also aware of broader understandings of ecotourism, stating that:

Rather than focus on the definition we wish to see the principles of ecotourism flourish where visitors’ experiences are improved, the environment is protected and appreciated and the business itself is sustainable.

The Committee has observed an increased interest in issues of sustainability, conservation and education across the broad nature-based tourism sector, not only from accredited ecotourism operators. However, the Committee appreciates that ecotourism is most often defined as a niche category within the tourism industry and is strongly associated with accredited sustainability practices. The Committee will use the term ‘ecotourism’ throughout the report to describe this sub-sector of the nature-based tourism industry. At the same time the Committee is concerned not to exclude operators outside this sub-category and is interested in how the nature-based tourism sector can best be supported as a whole. In this way the report will investigate potential within the nature-based tourism sector, including within its discussions a consideration of ecotourism ventures.

---

15 Tourism Victoria, submission no. 26, p. 6.
16 Victoria Tourism Industry Council, submission no. 64, p. 1.
17 Ecotourism Australia, submission no. 15, p. 1.
1.2 Defining heritage tourism

Internationally heritage is typically understood to encompass both natural and cultural aspects; a forest landscape is considered just as much a heritage site as an historic building. However, the Committee heard that heritage tourism in Victoria generally focuses on the built environment, and aims to provide tourists with experiences based on stories about particular historic sites, places or people. In addition, some stakeholders prefer to view heritage tourism as part of a broader cultural tourism sector that includes art galleries and theatre. While it is clear that ‘heritage’ is of interest to tourists and a key part of Victoria’s attraction for visitors, the policy context supporting heritage tourism is less certain about how to define and grow the sector.

Heritage is broadly understood as a society’s inheritance, and refers to those aspects of the past that a culture values and wishes to preserve for the future. In its submission to the inquiry the National Trust (Vic) explained the concept of ‘heritage’ as covering:

All that we, as a society, value today and wish to pass on to future generations. This is a very broad definition of ‘heritage’, and deliberately so. Its scope is much broader than ‘place’. It includes intangible as well as tangible heritage—language and customs, as well as places and moveable collections.18

The Heritage Council of Victoria provides a similar definition, focusing on the importance of storytelling to our understanding of heritage. The Heritage Council argues:

The value of heritage is in the capacity it holds to tell stories that explain to us our own transitory moment of history, instill [sic] connections to our past that ground us in our own time, and enrich the physical, visual and emotive experiences of residents and visitors who live or travel amongst it.19

Heritage Victoria’s key policy document, Victoria’s Framework of Historical Themes (‘the Framework’), highlights the unique aspects of Victoria’s heritage and provides a thematic framework for understanding the various stories associated with the state’s past. The Framework is designed as ‘a tool for developing a wider recognition and appreciation of Victoria’s diverse Aboriginal, historical and natural histories and the rich heritage resources these have created’.20 The Framework has a number of important applications, including assisting with the assessment and management of heritage places and objects, but it also aims to assist with ‘interpretation and tourism planning’.21

For the National Trust heritage tourism includes ‘visitation to places that have historic, Indigenous and natural values, their associated collections (including documentary collections), and the settings in which places are located’.22 The Heritage Council takes a similar view, emphasising the importance of heritage attractions such as historic houses and museums, and also highlights the

---

18 National Trust of Australia (Victoria), submission no. 70, p. 3.
19 Heritage Council of Victoria, submission 16 (a), p. 1.
21 Ibid., p. 3.
22 National Trust of Australia (Victoria), submission no. 70, p. 3.
value of heritage streetscapes — like those within Victoria’s goldfields — that provide an attractive ‘backdrop’ for tourist experiences. For both organisations heritage tourism centres on providing an experience for the visitor that links people to significant places through stories of the past.

Ms Kathryn Mackenzie, President of the industry association Cultural Tourism Victoria, argues for a broader understanding of heritage tourism to include ‘cultural tourism’. In a public hearing in Melbourne Ms Mackenzie stated that:

> Cultural tourism is one of the fastest growing industries in the Victorian tourism industry, but I believe that if we just separate heritage tourism, we are not getting the full picture. We really need to understand that what attracts people is not only the heritage but also the embellishment and the enrichment.24

This wider view of heritage tourism as a form of cultural tourism is shared by Tourism Victoria. The agency positions heritage tourism as part of the broader category of ‘cultural tourism’, which it understands as including the performing arts, festivals, museums and art galleries, as well as historic sites. Tourism experiences related to Indigenous Australians, including cultural performances and dance, are also categorised as part of the cultural tourism sector.

Despite this broader approach, heritage tourism is understood by the majority of the inquiry’s stakeholders to be closely associated with historic buildings and sites, rather than with artistic experiences or other cultural activities. This includes a number of heritage tourism operators that responded to the inquiry such as Sovereign Hill, Seaworks, and the Australian Aircraft Restoration Group. While the Committee understands that the Victorian Government considers heritage tourism as part of a wider category of cultural tourism (and conducts its visitor surveys and marketing on this basis), the Committee is of the view that specific attention should be paid to supporting the development of heritage attractions and experiences. Throughout the report the Committee will use ‘heritage tourism’ to refer primarily to tourism attractions relating to the interpretation of historic places and stories. Best practice in heritage tourism is discussed in Chapter Five.

The Committee also notes that there appears to be little overlap between the concepts of ecotourism and heritage tourism either at a policy level or from the perspective of operators. While Heritage Victoria does include the natural environment in its understanding of heritage, its legislative mandate is tied to the management of historic buildings, objects and archaeological sites. Similarly, Parks Victoria is predominately focused on land management and interpreting the historic heritage values of the natural environment is a low priority. While there does appear to be wide recognition that Victoria’s heritage includes natural and cultural aspects — and that heritage in its most holistic sense is attractive to visitors — this is not well articulated in a tourism

---

24 Ms K Mackenzie, Chair and President, Cultural Tourism Victoria, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 278.
25 Tourism Victoria, submission no. 26, p. 2.
context. It is the view of the Committee that a stronger focus on storytelling that integrates Victoria’s natural and cultural heritage will be important to growing the number of engaging tourism experiences across the state.

1.3 Indigenous heritage in Victoria’s tourism industry

An exception to the general separation of natural and cultural heritage within the tourism industry is found in the Indigenous tourism sector, which typically emphasises the centrality of nature to Aboriginal cultures. The interrelationship between Indigenous tourism and nature-based tourism is also common internationally and is a key feature of the tourism industry in North America.

Victoria has a small number of Indigenous tourism operators, although as discussed in Chapter Six the Committee views this as a key area for growth. The major Indigenous tourism products in Victoria, such as Brambuk and the Tower Hill Wildlife Reserve, represent partnerships between Parks Victoria and local Aboriginal communities. Victoria’s newly established Registered Aboriginal Parties are also becoming involved in cultural heritage tourism, such as the work of the Gunditj Mirring Traditional Owners Aboriginal Corporation in developing tours of the Budj Bim National Heritage Landscape.

Research indicates that international visitors to Australia seek engagement with Aboriginal heritage and culture, and that Victoria is well-placed to capitalise on this desire.26 Although there are currently few Aboriginal tourism ventures in Victoria, the Committee found that there was great interest amongst industry organisations and Indigenous groups to develop the sector further. In particular, the Committee heard that there was a desire to emulate the success of Indigenous tourism in New Zealand. As Mr Mick Harding, member of the Victorian Aboriginal Heritage Council noted:

'It seems to me that if you go to New Zealand, for instance — this is my own experience — you get a sense that each and every individual who is not of indigenous blood understands some really founding principles behind Maori culture. That is the sort of thing that I strive for personally, and I would like to think that other traditional owners throughout the state are able to have that opportunity to build that capacity.'27

The Committee understands Indigenous tourism as a specific form of tourism that combines aspects of ecotourism and heritage tourism, and as such is best discussed as a discrete part of the tourism sector. The Committee believes that Indigenous tourism is a key area for future growth and discusses ways to support the sector in Chapter Six.

---

27 Mr M Harding, Council Member, Victorian Aboriginal Heritage Council, Environment and Natural Resources Committee public hearing – Melbourne, 25 November 2013, transcript of evidence, p. 177.
1.4 Victoria’s natural and cultural heritage attractions

The Committee found that Victoria has a number of unique natural and cultural heritage assets, many of which are already the focus of high-quality, engaging tourism experiences. Victoria’s heritage is diverse and includes: An ancient volcanic landscape; one of the world’s oldest Indigenous cultures; a history of European pastoral settlement; the gold rush and nineteenth century towns; and stories of migration. Victoria’s heritage can be experienced in national and state parks, nature reserves, museums, historical buildings, at historical associations, on walking tours and in urban streetscapes. Throughout the inquiry the Committee visited a range of natural and cultural heritage sites, including Sovereign Hill, the Twelve Apostles, Point Nepean Quarantine Station, Brambuk Cultural Centre and the Grampians-Gariwerd National Park, Tower Hill Wildlife Reserve, Port Phillip Ecocentre, and Flagstaff Hill Maritime Museum.

The state currently appeals to a diverse range of tourists, including visitors from inter and intrastate, and is increasingly appealing to visitors from Asia. Further, Victoria has the advantage of being a relatively small state, with shorter distances for travellers to cover.

Nature-based tourism in Victoria’s national and state parks, wilderness areas and marine parks attracts over 86 million visitations per year, with parks in the Western region (including the Great Ocean Road) the most popular with tourists. Parks Victoria is also active in managing cultural heritage, including Indigenous and European sites, and has responsibility for 127 places listed on the Victorian Heritage Register.

Commercial activities in Victoria’s parks are regulated by Parks Victoria through a licensing scheme. There are currently 350 licensed tour operators (LTOs) in Victoria’s parks system. Parks Victoria issues commercial licences for a range of nature-based activities including bushwalking, bus tours, bird watching, canoeing, horse riding, rock climbing and mountain biking. One example of the range of businesses operating in the state’s parks is Adventure Victoria, an umbrella organisation for a group of nature-based operators working within the High Country. Many of the group’s activities take place in and around the Alpine National Park, with operators providing small group guided tours and nature-based activities such as horse riding, cycling, 4WD tours, bushwalking, and rafting.

A number of operators within the nature-based sector and working within parks have attained ecotourism accreditation. Parks Victoria provides incentives to LTOs to become eco-accredited and offers an extension to their licence period if they participate in a recognised program, such as those provided by Ecotourism Australia. One example is the walking tour company Bothfeet, which provides hutted accommodation and guided walking experiences along the Great Ocean Pathway.

---

28 Parks Victoria, submission no. 71, pp. 3, 6.
29 Ibid., p. 3.
30 Ibid., p. 6.
Walk.\textsuperscript{33} Another example is the Phillip Island Nature Parks — best known for the Penguin Parade — which is one of Victoria’s most visited attractions. In 2011-12 865,617 people visited the eco-accredited sites at the Penguin Parade, Churchill Island Heritage Farm and the Koala Conservation Centre, 55 per cent of whom were from overseas.\textsuperscript{34}

Victoria’s heritage tourism operators are diverse and include large organisations like the National Trust, alongside small community museums, privately-owned attractions and not-for-profit heritage destinations such as Sovereign Hill. As such, it is difficult to gauge visitor numbers for the heritage tourism sector, although Tourism Victoria states that ‘cultural tourism visitors represent 59\% of all international overnight visitors to the State,’ suggesting that cultural heritage is a drawcard for international visitors.\textsuperscript{35} For the same period (the year ending December 2012), Victoria received 2.6 million domestic overnight cultural tourism visitors.\textsuperscript{36} More broadly, Mr Jeremy Johnson, Chief Executive Officer of Sovereign Hill claimed that ‘57 per cent of international visitors to Australia go to a museum’.\textsuperscript{37}

Sovereign Hill is one of Victoria’s iconic heritage attractions focusing on the history of the gold rush. It is especially popular with Chinese tourists; at a public hearing in Ballarat, Mr Johnson noted that ‘one in three visitors to Victoria from mainland China go to Sovereign Hill’, which represents approximately 80,000 people.\textsuperscript{38} Sovereign Hill is an important example of a heritage tourism business that is actively engaging with international visitors and in particular, undertakes in-market promotion to attract Chinese tourists. Sovereign Hill is a major employer in the heritage tourism sector with 350 staff and a further 250 volunteers.\textsuperscript{39}

The National Trust is another key operator within the heritage sector. The membership-based advocacy group currently manages 24 heritage properties as tourist attractions, including Old Melbourne Gaol, Rippon Lea, and the Polly Woodside.\textsuperscript{40} The organisation states that more than 400,000 people visit a National Trust property each year, and that the Trust employs 118 people either full-time, part-time or casually.\textsuperscript{41} The National Trust focuses on guided tours of heritage buildings, but also stages performances and exhibitions at its properties. Heritage tourism is increasingly driven by technological innovation which, in the case of the National Trust, has led to the development of the \textit{Lost! Melbourne’s Lost 100} and \textit{Our City} smartphone apps to aid in the interpretation of its buildings.\textsuperscript{42}

The heritage tourism sector is dominated by volunteers, particularly in regional areas that rely on local historical societies to preserve heritage information and conduct tours. The Committee

\begin{itemize}
  \item \textsuperscript{33} Bothfeet, submission no. 57.
  \item \textsuperscript{34} Phillip Island Nature Parks, submission no. 68, p. 1.
  \item \textsuperscript{35} Tourism Victoria, submission no. 26, p. 2.
  \item \textsuperscript{36} Ibid., p. 3.
  \item \textsuperscript{37} Mr J Johnson, Chief Executive Officer, Sovereign Hill, Environment and Natural Resources Committee public hearing – Ballarat, 8 October 2013, transcript of evidence, p. 22.
  \item \textsuperscript{38} Ibid., p. 22.
  \item \textsuperscript{39} Sovereign Hill, submission no. 18, p. 3.
  \item \textsuperscript{40} National Trust of Australia (Victoria), submission no. 70, p. 2.
  \item \textsuperscript{41} Ibid., p. 2.
  \item \textsuperscript{42} Ibid., p. 9.
\end{itemize}
heard from a wide range of volunteer-based heritage groups involved in preservation and tourism, including the Australian Aircraft Restoration Group, which operates an aviation museum at Moorabbin airport; the Seaworks Foundation, which runs heritage shipping events and focuses on restoring the Seaworks Maritime Precinct in Williamstown; and the Association of Tourist Railways (Victoria), which represents 17 tourist railways across Victoria.43

Some local councils are active in the heritage tourism sector as managers and operators, such as Flagstaff Hill Maritime Museum, which is overseen by Warrnambool City Council, and Yarra Ranges Council manages the Yarra Ranges Regional Museum and is developing the Warburton Mountain Bike Centre.44 There are also a wide range of privately run heritage tourism businesses throughout Victoria like MELTours, a guided walking tour company based in Melbourne’s CBD that offers tours focusing on the city’s heritage, and Port of Sale Heritage Cruises, which operates cruises on a restored vessel.45

1.5 ‘Iconic’ sites and heritage listing

Victoria currently has one UNESCO World Heritage-Listed site — the Royal Exhibition Building and Carlton Gardens — and a number of nationally-recognised heritage sites, such as Lake Condah, the Point Nepean Quarantine Station and Bonegilla Migrant Camp. The Committee heard from a number of stakeholders who think there is potential for Victoria to have other sites UNESCO-listed, and that this could be an important catalyst for increased visitation. At a public hearing in Hobart, Dr Bob Brown, former senator for the Australian Greens, argued that Victoria is ‘missing out’ by not pursuing UNESCO status for, at a minimum, the Alpine National Park.46 Dr Brown suggested that there is a ‘tendency in a state or in a region to think it [the iconic site place] is somewhere else’.47 In doing so, it is easy for regions to underestimate their unique advantages ‘because we are familiar with what is in our backyard’.48

The Committee believes that Victoria’s public authorities should pursue the development of ecotourism and heritage tourism sites to meet an international best practice standard. Potential models for achieving best practice are discussed in Chapters Four and Five. In addition, the Committee is interested in the possible tourism advantages of UNESCO World Heritage status for more Victorian sites, and discusses the issue further in Chapter Seven.

A number of Victorian heritage-listed sites are also part of the Australian National Landscapes program, a partnership between Parks Australia and Tourism Australia to promote Australia’s key natural and cultural areas. In Victoria, the Alpine National Park, the Great Ocean Road, and Australia’s Coastal Wilderness (including East Gippsland) are part of the program. The initiative

---

43 Australian Aircraft Restoration Group, submission no. 88; Seaworks Foundation, submission no. 61; Association of Tourist Railways (Victoria), submission no. 29.
44 Flagstaff Hill Maritime Village, submission no. 60; Yarra Ranges Council, submission no. 59.
45 MELTours, submission no. 50; Port of Sale Heritage Cruises, submission no. 87.
48 Ibid., p. 247.
emphasises the nexus between tourism and conservation and aims for ‘our international and domestic visitors [to] become champions for protecting our natural places’. The program targets a segment of the tourism market known as the ‘experience seeker’: ‘Visitors who want to learn about the world they live in and connect with local culture.’ Australia’s National Landscapes provide the experience seeker with ‘off the beaten track experiences and opportunities to personally engage with culture and heritage’.

The Committee believes there is considerable potential to further develop engaging tourism ‘experiences’ that capitalise on Victoria’s most iconic natural and heritage assets. At a public hearing in Melbourne Mr Brett Cheatley, a parks planning consultant, described the typical ‘nature-based tourist’ in the following way:

They value unique and authentic experiences, they immerse themselves in culture and nature, they expect a higher level of service and products than we currently offer, they are stronger with internationals and they take longer trips and spend more time in regional Victoria.

Similar to the category of the ‘experience seeker’, Mr Cheatley’s idea of the nature-based tourist is one who is interested in tourism products that combine both natural and cultural heritage, and physical activity with interpretation or education.

The Committee is confident that Victoria has the potential to develop engaging experiences at a range of iconic sites, providing a significant boost to the tourism industry. The following chapters will discuss a range of views on how to capitalise on the advantages of Victoria’s natural and cultural assets, and how government policy could be reshaped to support the development of best practice ecotourism and heritage tourism experiences. The remainder of this chapter discusses the policy context for heritage and ecotourism in Victoria, and provides data on Victorian tourism.

1.6 Recent developments in tourism policy

1.6.1 Victoria’s 2020 tourism strategy

Tourism policy at the state level is developed with the advice of Tourism Victoria, a statutory authority within the Department of State Development, Business and Innovation. Tourism Victoria works under the Tourism Victoria Board, and reports to the Minister for Tourism and Major Events. In July 2013 the Victorian Government released Victoria’s 2020 Tourism Strategy.
(‘the 2020 Strategy’) a long term framework and ‘whole-of-government’ document designed to guide the development of the tourism industry. The 2020 Strategy’s vision for Victoria is threefold: Victoria is to be the leading tourism destination in the Asia Pacific Region; tourism is to be a leading contributor to the Victorian economy; and, Victoria will provide a range of experiences and an environment that supports the aspirations and culture of strong growth economies such as China, India and Indonesia.\(^{52}\)

The 2020 Strategy identifies a major opportunity as ‘the development of regional tourism and dispersal of visitors to regional Victoria’.\(^ {53}\) Indeed, the 2020 Strategy goes further to state that ensuring the benefits of tourism are spread across the state is both a fundamental goal of the government and an ‘overarching priority in the Strategy’.\(^ {54}\) The policy aims to grow the value of tourism to the Victorian economy to approximately $34 billion by 2020-21, including both direct and indirect contributions to Gross State Product, and generate 310,000 direct and indirect jobs.\(^ {55}\)

The 2020 Strategy identifies the following seven priority areas to support the industry:

1. Digital excellence — such as encouraging the development of websites and smartphone apps to showcase the industry and allow for online bookings.
2. International marketing — especially in the emerging markets of China, India, Malaysia and Indonesia. This is also the focus of the Victorian Government’s 2012 China Tourism Strategy (see below).
3. Domestic marketing — promoting food and wine destinations, wellbeing and spa activities, cultural-based tourism, and experiences in regional Victoria.
4. Major and business events — expanding the number of events held within Victoria.
5. Air services attraction — improving air access to Victoria from key markets, including direct air access from China, India and South East Asia.
6. Investment attraction and infrastructure development — including improving infrastructure at key tourist attractions to support increased visitation from Asia, and exploring development opportunities in national parks. Regional Tourism Boards have a role in providing advice on regional investment priorities.
7. Skills and workforce development — developing Asian language skills and cultural understanding, and encouraging workers to enter the industry, particularly in regional areas.\(^ {56}\)

As noted, the 2020 Strategy highlights regional tourism as a key challenge, and declares an aspiration to see the economic benefits of tourism more evenly dispersed throughout the state. In this context, the 2020 Strategy notes that tourism to the regions has been relatively stagnant, stating that between 2000 and 2012 domestic overnight visitors to regional Victoria declined at a rate of 0.5 per cent per annum.\(^ {57}\) Some regions beyond the two hour travelling circle from Melbourne have also experienced declines in visitation. The 2020 Strategy notes that the


\(^{53}\) Ibid., p. 6.

\(^{54}\) Ibid., p. 7.

\(^{55}\) Ibid., p. 6.

\(^{56}\) Ibid., pp. 11-23.

\(^{57}\) Ibid., p. 7.
Victorian Government is committed to working with Regional Tourism Boards to address local issues. The Victorian Government will introduce and expand the Regional Tourism Partnership Program, bringing together regional marketing, tourism excellence, digital excellence and Regional Tourism Board support programs. Another strong emphasis of the 2020 Strategy is the focus on Asian markets, with China seen as an increasing focus of tourism marketing in the short to medium term, and India, Malaysia and Indonesia viewed as the focus of medium to long term activities.

Nature-based tourism was the focus of a dedicated Victorian Government policy from 2008-2012. That strategy had as its vision that Victoria would be recognised as the leading sustainable nature-based tourism destination in Australia. Although this has now expired, the 2020 Strategy policy states that the Victorian Government is ‘committed to further developing nature based tourism’, particularly through the development of a dedicated trails policy and by supporting private sector investment in national parks. A trail strategy focused on developing walking, cycling and horse riding tracks has been recently released.

Other Australian jurisdictions, such as Queensland and Western Australia, have developed nature-based and/or ecotourism strategies, which specifically address the development and potential of this area of tourism in their respective states. Where relevant, these strategies from other states will be referred to in following chapters.

1.6.2 Victoria’s regional tourism strategy 2013-2016

Alongside the 2020 Strategy the Victorian Government has released in 2013 Victoria’s Regional Tourism Strategy 2013-2016 (‘the Regional Strategy’). The Regional Strategy elaborates the seven priority areas developed by the 2020 Strategy, and also identifies a number of priority initiatives for different regional centres. The Victorian Government signalled its support for regional tourism through funding initiatives worth $13.2 million over four years (in the 2012-13 state budget) and a further $8 million over four years in the 2013-14 state budget. The $13.2 million is mainly directed at the Regional Tourism Partnership Program. The Regional Strategy sees the product strengths of regional Victoria as including: Food and wine; nature-based; spa and wellbeing; and art and culture. The key experiences of nature-based tourism include natural icons such as the Twelve Apostles and the Grampians.

In terms of priority areas, in marketing the Regional Strategy includes a partnership action directed at launching a multi-platform campaign highlighting the diversity of regional Victoria’s experiences that targets Victorians. International marketing strategies also need development. For digital excellence the Regional Strategy states that Regional Tourism Boards (RTBs) need to be

---

58 Ibid., p. 17.
59 Ibid., p. 7.
61 Ibid., p. 7.
64 Ibid., p. 9.
encouraged to take advantage of the Australian Tourism Data Warehouse distribution platform, which will allow expanded distribution of destination information beyond the region’s own websites. In relation to major events the Regional Strategy calls on government agencies, RTBs and local government to maximise and expand the opportunities for major events and business events in regional destinations. For investment and infrastructure the Regional Strategy calls for improved coordination and planning for tourism in the regions, greater flexibility in the planning provisions for tourism developments, the removal of prohibitions on private sector development in national parks, and streamlining the approvals process on private and public land. Industry development in the regions includes the priority of RTBs in setting strategic directions for their regions, ensuring that this direction is communicated to all stakeholders and acting as the conduit between industry in the region, Tourism Victoria and local and state governments. A variety of actions are proposed involving industry structures, the Regional Tourism Partnership Program, workforce development, destination management and crisis management.65

For the individual regions, the Regional Strategy articulates a number of opportunities and actions. For Daylesford and Macedon Ranges these include further development of region strengths in spa and wellbeing and food and wine, and undertaking nature-based tourism product development, including walking and cycling trails. In Gippsland key actions include supporting nature-based infrastructure development in national parks, such as the Coastal Wilderness Walk, and infrastructure upgrades to water based facilities. For the Goldfields region the Regional Strategy sees the major opportunities as continuing to focus on supporting investment and marketing of new and existing cultural, and heritage infrastructure, and enhancing the region’s reputation for high quality tourism events. The Grampians region is viewed by the Regional Strategy as in need of continued development of the Grampians Peak Trail, continued promotion of Aboriginal cultural tourism, and encouraging investment through reform of planning zones.66

For the Great Ocean Road, actions include support for the development of a master plan for the Shipwreck Coast, development of nature-based tourism infrastructure along the Great Ocean Road and the Great Ocean Walk, and advancing the master plan for Indigenous heritage site Budj Bim. The Mornington Peninsula region actions include supporting appropriate development at Point Nepean that facilitates a year round destination with multiple uses that both preserves heritage and provides new experiences. For the Murray region actions include upgrades to Murray River ports infrastructure, diversification of the region’s accommodation, and development of nature-based infrastructure in the River Red Gum National Park. Phillip Island is viewed as having opportunities in encouraging overnight visitation through diversified accommodation, and a continued focus on enhancing access to the region.

For Victoria’s High Country key actions include investigating opportunities for nature-based investment and product development, and encouraging development of small and boutique accommodation in sympathy with nature-based assets in the region that provide visitors with personalised experiences. For the Yarra Valley and Dandenong Ranges the opportunities relate to

---

66 Ibid., pp. 29-32.
enhancing current strengths in food and wine and nature-based offerings. A key action is to evolve to an integrated peak Regional Tourism Body in cooperation with Yarra Ranges Council and local stakeholders.67

1.6.3 *Victoria’s China tourism strategy*

In 2012 the Victorian Government released the *Victoria’s China Tourism Strategy* (‘the China Strategy’). The importance of China to tourism in Victoria is underscored by the visitation numbers, with China now the number one origin country for international visitors to Victoria.68 A major issue for Chinese visitation to the state, is the need to encourage ‘dispersal’ of Chinese tourists to regional areas, both to stay longer and to stay overnight. Nights in the regions represent only three per cent of the total nights spent by Chinese visitors in Victoria.69

The China Strategy has five priorities: Developing a strong and unique brand in China by expanding into growth cities and provinces, including the need to maximise the digital platform for marketing; building on the education, migrant and business links to Victoria, particularly by a better understanding of the education market and the role of family visitation in tourism; improving visitor access regarding aviation and visas, including the development of a more viable set of China-Victoria flights; enhancing the visitor experience by increasing language services including the development of a range of Chinese language visitor resources on transport, shopping and restaurants; improving the quality of experiences; and refreshing priority attractions and attracting new investment. There is also a critical need to ensure that major destinations such as Phillip Island, the Great Ocean Road and Sovereign Hill, are well planned and developed for increased visitation, so that sites such as these are able to manage both environmental concerns and natural limitations.70

1.6.4 *Victoria’s Aboriginal tourism strategy 2013-2023*

In 2013 the Victorian Government released *Victoria’s Aboriginal Tourism Strategy 2013-2023* (‘the Aboriginal Tourism Strategy’). The Aboriginal Tourism Strategy focuses on supporting the development of high quality, authentic Indigenous products and experiences.71 The policy considers Aboriginal tourism as a good method for encouraging the dispersal of visitors throughout regional Victoria, although it also seeks to brand Melbourne as a destination that provides an accessible Aboriginal experience for visitors. The four key directions that provide the framework for the strategy are:

- To position Melbourne as a destination recognised as having a suite of in-depth authentic experiences;

---

67 Ibid., pp. 33-38.
69 Ibid., p. 9.
70 Ibid., pp. 12-27.
To develop and promote regional Indigenous offerings;
- To develop and grow Indigenous business capabilities; and,
- To market and distribute Indigenous products and experiences to a global audience. 72

A key focus of the Aboriginal Tourism Strategy is the role of tourism in providing employment and business opportunities for Indigenous Victorians. The strategy also identifies, as a measure of success, that at least one unique iconic attraction will establish Victoria as a destination for Aboriginal tourism. At present, Victoria secures only 12 per cent of the total Aboriginal tourism activity undertaken by international visitors to the country.73 Amongst the key actions to be undertaken to deliver on the four directions outlined by the strategy are: To develop an Aboriginal Victorian brand that differentiates itself from outback Australia; to ensure that regional experiences are well positioned and marketed; to support a Budj Bim World Heritage listing application; to develop an Aboriginal Cultural Awareness Program for both Indigenous and non-Indigenous tourism businesses; and, to work with Tourism Australia and Aboriginal Business Australia to support and market Victorian Aboriginal tourism businesses. 74

1.6.5 **Victoria’s Trails Strategy 2014-24**

Tourism Victoria’s recently released *Victoria’s Trails Strategy 2014-24* offers a whole-of-government approach to the development, maintenance and promotion of the state’s network of walking and riding trails. The strategy identifies walking as a key part of the nature-based sector, and suggests that connecting with wildlife and the natural environment is one of Victoria’s major attractions for overseas visitors. 75 The strategy outlines how different trails will appeal to different types of users, and therefore need different kinds of amenities and infrastructure; some trails aim to be major destinations for the international/national market, while others may be primarily concerned with serving a local community. 76

The strategy comprises the following five key directions: ‘Provide a strategic framework for trail investment; support effective planning, development and maintenance of trails; provide high quality information regarding trails; create better trail experiences; and market trails’. 77 The strategy articulates a set of ‘investment principles’ to guide decision-making about the development of trails, which focuses on how trails can deliver quality experiences to their defined target users and offer economic, environmental, heritage, and social benefits to the wider region. 78 In particular, the strategy highlights the importance of delivering appropriate information and interpretation to trail users, noting that ‘through storytelling and interpretation, visitors gain knowledge and an appreciation of Victoria’s natural environment, culture and heritage’. 79 The strategy also emphasises the importance of trails providing an ‘integrated’

---

72 Ibid., p. 3.
73 Ibid., pp. 4-6.
74 Ibid., pp. 12-15.
76 Ibid., p. 17.
77 Ibid., p. 12.
78 Ibid., pp. 14-5.
79 Ibid., p. 6.
experience for visitors, so that complementary services and activities — such as accommodation, food and wine — are easily accessible. Interpretation/information kiosks are also viewed as important in ‘creating better trail experiences’. Tourism Victoria and the Victorian Trails Coordinating Committee will be primarily responsible for implementing the strategy, and will work alongside Regional Tourism Boards, community and special interest organisations, such as cycling groups, as well as private operators.

1.7 National parks policy and legislation

In 2006 the previous Victorian Government released its *10 Year Tourism and Events Industry Strategy*, which foregrounded the development internationally of a convergence between tourism and environmental sustainability. Importantly, the strategy noted, and gave examples of, best practice sustainability models for ecotourism commercial development in national parks in other jurisdictions, such as the United States, New Zealand and Canada. The strategy included discussion of infrastructure development, investment attraction, nature-based tourism accommodation, and the partnership between government and industry. One of the products of this strategy was the development of the recently expired *Victoria’s Nature-Based Tourism Strategy 2008-2012*.

This was the state’s first strategy to focus on nature-based tourism, and aimed to provide a coordinated, long-term approach to the sector involving Tourism Victoria, Parks Victoria and the then Department of Sustainability and Environment. The strategy, which is further discussed in Chapter Four, had as its vision that Victoria would be recognised as the leading sustainable nature-based tourism destination in Australia. It also identified that there were a number of product ‘gaps’ in the sector that were preventing potential growth.

In September 2010, as part of addressing such products gaps in the nature-based tourism sector, the then Labor Government directed the Victorian Competition and Efficiency Commission (VCEC) to conduct an inquiry into the barriers that existed to the developments of Victoria’s tourism industry, and the creation of new tourist infrastructure. The Final Report of the VCEC was released in June 2011.

Following the 2011 Final Report of the VCEC, *Unlocking Victorian Tourism*, the Victorian Government passed legislation to facilitate private investment in national parks via the granting of long-term leases in selected areas.

The *Unlocking Victorian Tourism* report presented a number of key messages to government. These included: The overall context of international tourism growth and the challenges of

---

80 Ibid., p. 24.
83 Ibid., p. 7.
regional markets; planning control restrictions on tourism development and the need for a more flexible approach to be adopted by government; a lack of facilities on or near national parks that diminish their value to visitors, with Victoria one of only two Australian jurisdictions that prohibit private tourist facilities in parks; and a general recommendation to remove the prohibition on private development of tourist facilities in national parks where they complement environmental and heritage values and generate a public good.85

The report provided examples of sensitive developments in national parks in other jurisdictions, such as in Karijini National Park, Western Australia, Lake Saint Clair National Park, Tasmania, and Fiordland National Park, New Zealand.86 The Final Report made 17 recommendations.

In its 2012 response, the Victorian Government supported the key recommendations of the VCEC report, including all of the land-use planning and the management and use of public lands recommendations. The government stated that it would make changes to the land-use planning system and the management of public lands to ensure the appropriate development of the tourism industry.87

In 2013 the Victorian Government released guidelines which focused on providing opportunities for ‘appropriate and environmentally sensitive investment opportunities in national parks’.88 The guidelines provide for a five stage approval process for proposals that will be considered in relation to eight high level principles. These state that tourism investment opportunities must be sensible and sensitive to the national park setting, consistent with legislative objectives, take account of associated risks, and encourage access to national parks by Aboriginal tourism enterprises. Principle Five states that:

Tourism facilities must be established and managed in an ecologically sustainable manner, must minimise impact on Aboriginal cultural and historic heritage and must contribute to the maintenance and enhancement of national park values.89

In addition, the greatest net public benefit of a proposal will be determined by considering three outcomes:

- Environmental outcomes – the primary purpose of national parks is the preservation and protection of the natural environment;
- Social outcomes – parks are for the use and enjoyment of the public; and,
- Economic outcomes – proposals may include a broader economic benefit to the region.90

---

85 Ibid., p. xxi.
86 Ibid., p. xli.
89 Ibid., p. 3.
90 Ibid., p. 3.
Two further principles are that the approvals process should not compromise proponents’ intellectual property, and lease durations will be commensurate to the level of capital investment. In regard to the latter, lease durations will need to follow the leasing principles set out in the *Leasing Policy for Crown Land in Victoria 2010*. Any lease lengths beyond 65 years would need to demonstrate regional and/or state significance.91

The *National Parks Act 1975* was amended by the passage of the *National Parks Amendment (Leasing Powers and Other Matters) Act 2013* to allow for changes to leases and licences in national parks and to provide further regulation making powers. New section 19G gives the Minister the power to grant leases not exceeding 21 years, and provides provisions in support of such lease grants. New sections 19H and 19I provide for, respectively, the power of the Minister to give in-principle approval of longer term leases up to 99 years, and the power to grant such leases. The Minister is also empowered to grant licences associated with such lease arrangements. The Act also amended lease arrangements in relation to specific national parks, such as Point Nepean National Park (see new sections 30AAAB-30AAAD).

Agreements to lease land under new sections 19G and 19I will be ‘subject to conditions that prevent or minimise any adverse impact on the park (including its natural, indigenous, historic, cultural, landscape and recreational values) by the development or use of the land that is permitted under the agreement’, and may be subject to other conditions (see s. 19J(2)).92

### 1.8 Heritage tourism policy

Heritage tourism is not an explicit focus of recent government policy. However, Victoria’s *Regional Tourism Strategy 2013-2016* does mention the development potential offered by heritage buildings and streetscapes in regional towns. In its submission to the inquiry, Tourism Victoria stressed the centrality of heritage to Victorian tourism, with key offerings in gold rush heritage, bush rangers, Chinese history, maritime history and Aboriginal heritage.93

One of the Regional Strategy’s key actions is to continue to support ‘The Goldfields — Australia’s Premier Heritage Region’ project, through the development of touring routes and trails, improved visitor signage and interpretation products, and pursuing UNESCO World Heritage Listing for the Castlemaine Diggings area.94 The report also identifies opportunities to develop heritage tourism products associated with Glenrowan (relating to Ned Kelly).95 The most recent policy document related to heritage tourism is the 2010 *Victoria’s Arts, Theatre & Cultural Heritage Tourism Action*

---

91 Ibid., p. 7.
93 Tourism Victoria, submission no. 26, pp. 2-5.
95 Ibid., p. 37.
Plan 2010-2014. In this document heritage tourism is viewed broadly as falling within cultural tourism offerings.\textsuperscript{96}

Overall, ecotourism and heritage tourism are subsectors within the existing tourism marketplace. Although neither area is currently the focus of dedicated Victorian Government policy, both sectors will be impacted by recent policy changes designed to boost the place of tourism within the state economy. In particular, evidence gathered by the Committee in relation to ecotourism is relevant to the Victorian Government’s plan to encourage appropriate commercial development within national parks.

In relation to heritage tourism, the area is viewed by the Victorian Government as a key way of encouraging the dispersal of visitors to regional areas. The inquiry’s stakeholders have also raised issues about infrastructure improvement, workforce skills development, technological innovation, and ‘China-readiness’, which echo priority areas identified in the state’s 2020 Strategy.

1.9 National tourism policy

Tourism 2020 is the current national long-term strategy to build Australia’s tourism industry. Tourism 2020 was launched in 2011 and combines (and updates) a number of previous policy frameworks into a single plan. As such, it combines the National Long-Term Tourism Strategy launched in 2009, with the 2020 Tourism Industry Potential of 2010.\textsuperscript{97} The latest iteration of the strategy was in 2013, with the release of 2020 Setting the foundation (2010-2014): Tourism Australia’s journey 2010 to 2013.

Tourism 2020 is endorsed by all state and territory tourism ministers, and is implemented via a whole-of-government approach in partnership with industry. Funding costs to implement the strategy are shared on a 50-50 basis between the Commonwealth and states and territories.

Tourism 2020 has five key aims, which are to: increase the overnight tourism spend to between $115 and $140 billion by 2020; increase tourism labour and skills; increase accommodation rooms; increase aviation capacity; and improve industry quality and productivity.\textsuperscript{98} The six main areas of focus for the strategy are:

- Grow demand from Asia, particularly China and India;
- Build competitive digital capacity;
- Encourage investment development through regulatory reform;
- Improve tourism transport capacity and infrastructure to increase visitor numbers and enable dispersal;


\textsuperscript{97} Department of Resources, Energy and Tourism, National Long-Term Tourism Strategy, Australian Government, Canberra, 2009; Tourism Australia, Tourism Industry Potential – a scenario for growth, Tourism Australia, Australian Government, 2010. Tourism Australia is governed by a Board of Directors who report to the Federal Minister for Tourism.

- Address labour and skill shortages, including Indigenous participation; and
- Increase industry innovation, productivity and quality.\textsuperscript{99}

The national \textit{China 2020 Strategic Plan} was launched in 2011, and aims for Australia to remain competitive in China’s fast-growing outbound tourism market.\textsuperscript{100} The plan notes that China is Australia’s most valuable tourism market, and that by 2020 it has the potential to contribute between $7 to $9 billion annually to the economy. It identifies five areas regarded as pivotal to achieving China’s 2020 tourism potential.

The first of these is ‘Know the customer’ – wherein Tourism Australia will use its knowledge of middle class Chinese consumer patterns to build market share. The ‘Geographic strategy’ will allow for the expansion over time into new areas using data collected on over 600 Chinese cities. The third area concerns quality experiences and notes that there are instances where visitor expectations are not met – language and product relevance are two issues identified to be addressed. A healthy aviation environment is critical to the success of 2020, while the last area concerns the role of key partnerships.\textsuperscript{101}

In 2012 the national \textit{2020 India Strategic Plan} was released. The plan contains similar priority areas to the China plan, and notes that the potential value of this market to the Australian economy is between $1.9 to $2.3 billion by 2020.\textsuperscript{102}

\subsection*{1.10 The contribution of tourism to the national and Victorian economies}

The contribution of tourism to the Australian economy can be measured in different ways. In terms of total tourism consumption, the contribution of tourism to the national economy in 2012-13 was $110 billion, a four per cent rise, in nominal terms, over the figure for 2011-12.\textsuperscript{103} The contribution of domestic travel to this total in 2012-13 was $83 billion, 75 per cent of the total, while the contribution of international travel was $27 billion (25 per cent). Of domestic travel the largest contributor was intrastate travel at $36 billion. Interstate travel totalled $28 billion, and same-day travel was calculated at $19.4 billion.

Victoria’s contribution to total tourism consumption in 2012-13 was $23.9 billion, representing 22 per cent of the national total. The share of domestic tourism in Victoria was in line with the national average at 74 per cent.\textsuperscript{104}

\begin{itemize}
\item \textsuperscript{99} Ibid., p. 1.
\item \textsuperscript{100} Tourism Australia, \textit{2020 Summary of Tourism Australia’s China 2020 Strategic Plan}, Tourism Australia, Australian Government, 2011.
\item \textsuperscript{101} Ibid., pp. 2-3.
\item \textsuperscript{102} Tourism Australia, \textit{2020 Summary of Tourism Australia’s India 2020 Strategic Plan}, Tourism Australia, Australian Government, 2012.
\item \textsuperscript{104} Ibid., pp. 7-9.
\end{itemize}
Regarded as the most accurate measure of the tourism contribution the economy, gross value added (GVA) measures total labour income and capital revenue plus net taxes on production. In 2012-13, total direct and indirect GVA was $80 billion. The Victorian share of total direct and indirect GVA for 2012-13 was $17.2 billion, representing 21.5 per cent of the national total.\textsuperscript{105}

In terms of employment, there were 543,700 people directly employed in the tourism industry nationally in 2012-13, which represented a 2.2 per cent increase from the previous year. Victoria’s share of tourism employment was 23 per cent, which translates to a total of 124,000 people directly employed in tourism in Victoria in 2012-13. The tourism sectors’ share of total employment in Victoria for that period was 4.3 per cent.\textsuperscript{106}

Overall, a further 385,400 people were employed in industries that supported tourism demand indirectly in 2012-13. When combined with direct tourism employment, this produces a total figure of 929,000 people working nationally in the industry or in its support. Victoria’s share of indirect tourism employment was 21 per cent, amounting to a further 79,000 employed persons.\textsuperscript{107}

While the tourism sector continues to grow, in the period 2006-07 to 2012-13 the size of the tourism sector has actually decreased marginally relative to the whole economy. This is due, in part, to the fact that other industries have shown stronger growth over this period, such as mining, and professional and technical services.\textsuperscript{108} In addition, this period also saw the external shock of the Global Financial Crisis in 2008 which depressed demand for tourism globally. However, the most recent years of 2011-12 and 2012-13 have shown a pick-up in tourism demand. The driver of changes to recent tourism expenditure seems to have originated from in-bound stimulus, particularly from China.\textsuperscript{109}

A recent report by Deloitte Australia, titled \textit{Positioning for prosperity? Catching the next wave}, focuses on the economic sectors that will provide the country with future prosperity. The report nominates five areas of advantage that have the potential to be as big as the mining sector. These are; gas, agribusiness, tourism, international education and wealth management.\textsuperscript{110} Deloitte states that ‘exceptional ‘growth in these five sectors could add about $250 billion to the economy between 2013 and 2033’.\textsuperscript{111}

According to the report, tourism is projected to be among the world’s fastest growing industries. It argues that ‘Australia is ideally located to capitalise on the burgeoning Asian middle class and the demand for international travel that this is generating’.\textsuperscript{112} The Deloitte report estimates global growth in tourism at 4 per cent per annum from now to 2033, representing a doubling in size of

\textsuperscript{105} Ibid., pp. 10-12.
\textsuperscript{106} Ibid., pp. 13-14.
\textsuperscript{107} Ibid., p. 15.
\textsuperscript{108} Ibid., p. v.
\textsuperscript{109} Ibid., p. 16.
\textsuperscript{111} Ibid., p. 13.
\textsuperscript{112} Ibid., p. 33.
the industry over that time. The distinct Australian advantages are proximity to Asia, nature-based assets, safety and languages, and cheaper flights. Australia is also expected to continue to leverage the country’s status as a popular destination for international students.

The report identifies improved infrastructure (including road links to regional areas); increased accommodation capacity in capital cities; and developing skills within the tourism workforce as important steps to supporting the ‘next wave’ of tourism industry expansion. The report states that in order to make the most of this potential growth wave, ‘we need to ensure that the attractiveness of Australia’s unique tourism assets outweighs the limitations of our tourism industry’.

While statistics vary, it is generally agreed within the tourism industry that nature-based and ecotourism represent among the fastest growing segments of the tourism market. The International Ecotourism Society has reported that globally by the mid-2000s ecotourism was growing three times faster than the tourism industry as a whole. In Victoria, both nature-based and heritage experiences are regarded as Victorian tourism strengths.

Given this scenario of potential future growth, for both the heritage sector and particularly the ecotourism sector, it is vital that Victoria ensures that its ‘natural advantages’ and assets in both areas are fully and sustainably developed.

Tourism Research Australia (TRA) provides forecasts on growth in the tourism sector. The forecasts represent the most likely outcome for tourism given past trends, current information and the impact of policy and industry changes. The Spring 2013 forecasts have international visitor arrivals to Australia growing by 5.6 per cent in 2014-15, to 7 million visitors. The forecast for the 10 year long-run average growth for in-bound visitors is for growth of 4 per cent per annum, to reach 9.3 million visitors by 2022-23. National domestic visitor nights are forecasted to grow by 1.5 per cent in 2014-15.

---

113 Ibid., p. 32.
114 Ibid., pp. 32-34.
115 Ibid., p. 34.
117 See Tourism Victoria, submission no. 26.
119 Ibid., p. 6.
1.11 Recent tourism data on Victoria – International visitation

Tourism Victoria publish data based on the International Visitor Survey conducted by Tourism Research Australia (TRA). This data shows that to the year ended March 2014, there were just under two million overseas overnight visitors to Victoria, who spent a total of over $4.76 billion in the state. The almost two million visitors represents a rise of 10 per cent on visitor numbers for the previous year, while the rise in expenditure by overseas visitors was 6.7 per cent in the same period. This data provides general information on tourism visitation to Victoria but specific data on ecotourism or heritage tourism visitation is not currently available.

Table 1.1 shows data on international overnight visitor numbers for the Melbourne region, the total for regional Victoria, and the total for Victoria for the years ending March 2010, 2013 and 2014. N.B. It is important to note that these figures capture overnight visitation, not day trip visitation by international visitors.

<table>
<thead>
<tr>
<th>International Over-night Visitor Estimates</th>
<th>2010 (000s)</th>
<th>2013 (000s)</th>
<th>2014 (000s)</th>
<th>Annual Average Growth 2010/2014</th>
<th>% change 2013/14</th>
</tr>
</thead>
<tbody>
<tr>
<td>Melbourne</td>
<td>1,413.1</td>
<td>1,713.2</td>
<td>1,894.1</td>
<td>7.6%</td>
<td>10.6%</td>
</tr>
<tr>
<td>Regional Victoria</td>
<td>314.2</td>
<td>318.3</td>
<td>356.3</td>
<td>3.2%</td>
<td>11.9%</td>
</tr>
<tr>
<td>Total Victoria</td>
<td>1,515.3</td>
<td>1,814.9</td>
<td>1,996.7</td>
<td>7.1%</td>
<td>10.0%</td>
</tr>
</tbody>
</table>


Table 1.1 shows that regional Victoria had over 350,000 international overnight visitors to the year ended March 2014, which was rise of almost 12 per cent on the figure for the previous year. Table 1.1 also shows that overall, regional Victoria has experienced an annual average growth rate from years ending March 2010 to 2014 of 3.2 per cent per annum, while the Victorian total (including Melbourne) for the same period is 7.1 per cent.

The Melbourne region is the leading destination for international overnight visitation in Victoria with over 1,894,000 international visitors to the year ending March 2014, and an annual average growth rate between 2010 and 2014 of 7.6 per cent per annum.

Table 1.2, over page, shows overnight international visitation for all of the 11 campaign regions.

---

120 All the statistics in this section are derived from Tourism Victoria Research Unit Fact Sheets, which are published on the Tourism Victoria website, see Tourism Victoria, ‘International visitation’, Tourism Victoria, accessed 29 June 2014, http://www.tourism.vic.gov.au/research/international-research/international-visitation.html.
Table 1.2: International Overnight Visitation Estimates to Victoria by Campaign Region
Years ending March 2010, 2013, 2014

<table>
<thead>
<tr>
<th>International Over-night Visitor Estimates</th>
<th>2010 (000s)</th>
<th>2013 (000s)</th>
<th>2014 (000s)</th>
<th>Annual Average Growth 2010/2014</th>
<th>% change 2013/14</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daylesford &amp; the Macedon Ranges</td>
<td>11.2</td>
<td>10.6</td>
<td>10.2</td>
<td>-2.5%</td>
<td>-4.0%</td>
</tr>
<tr>
<td>Gippsland</td>
<td>58.0</td>
<td>45.6</td>
<td>56.6</td>
<td>-0.6%</td>
<td>24.2%</td>
</tr>
<tr>
<td>Goldfields</td>
<td>31.2</td>
<td>39.6</td>
<td>35.3</td>
<td>3.1%</td>
<td>-10.8%</td>
</tr>
<tr>
<td>Grampians</td>
<td>35.1</td>
<td>37.1</td>
<td>32.4</td>
<td>-2.0%</td>
<td>-12.8%</td>
</tr>
<tr>
<td>Great Ocean Road</td>
<td>159.0</td>
<td>158.8</td>
<td>173.1</td>
<td>2.2%</td>
<td>9.0%</td>
</tr>
<tr>
<td>Melbourne</td>
<td>1,413.1</td>
<td>1,713.2</td>
<td>1,894.1</td>
<td>7.6%</td>
<td>10.6%</td>
</tr>
<tr>
<td>Mornington Peninsula</td>
<td>37.3</td>
<td>31.0</td>
<td>44.6</td>
<td>4.6%</td>
<td>43.8%</td>
</tr>
<tr>
<td>Murray</td>
<td>39.1</td>
<td>40.9</td>
<td>48.7</td>
<td>5.6%</td>
<td>19.2%</td>
</tr>
<tr>
<td>Phillip Island</td>
<td>27.7</td>
<td>26.4</td>
<td>31.6</td>
<td>3.4%</td>
<td>19.9%</td>
</tr>
<tr>
<td>Victoria’s High Country</td>
<td>21.9</td>
<td>18.7</td>
<td>17.9</td>
<td>-4.9%</td>
<td>-4.2%</td>
</tr>
<tr>
<td>Yarra Valley &amp; Dandenong Ranges</td>
<td>26.7</td>
<td>26.4</td>
<td>33.6</td>
<td>5.9%</td>
<td>27.1%</td>
</tr>
<tr>
<td>Regional Victoria</td>
<td>314.2</td>
<td>318.3</td>
<td>356.3</td>
<td>3.2%</td>
<td>11.9%</td>
</tr>
<tr>
<td><strong>Total Victoria</strong></td>
<td><strong>1,515.3</strong></td>
<td><strong>1,814.9</strong></td>
<td><strong>1,996.7</strong></td>
<td><strong>7.1%</strong></td>
<td><strong>10.0%</strong></td>
</tr>
</tbody>
</table>

Tourism Victoria Research Unit, June 2014.

Table 1.2 shows significant variations in overnight international visitation to the various regions over this period. In regional Victoria in 2014, overnight international visitation was strongest in the Great Ocean Road, Gippsland, Murray and Mornington Peninsula regions, while some regions with closer proximity to Melbourne saw lower overnight visitation numbers. The majority of the regions saw growth across the period from 2010 to 2014, but there were falls in the High Country, the Grampians and Daylesford regions. This data for international overnight visitation regional Victoria needs to be treated with some caution. Some of Victoria’s most iconic destinations, such as Phillip Island, the Great Ocean Road, and Sovereign Hill have very high international visitation numbers in terms of daytrip visitors. For example, international overnight visitation to Phillip Island was just 31,600 visitors to the year ended March 2014.121 However, in their submission to the inquiry Phillip Island Nature Parks note that over half a million people visit the Phillip Island

Penguin Parade each year, and that over half of these visitors are international visitors.  
Similarly, as shown above, the Goldfields region had just 35,300 international overnight visitors to the year ended March 2014. But data provided in the Sovereign Hill Museums Association’s submission to the inquiry shows that overseas visitors to Sovereign Hill regularly top 120,000 visitors per annum. Likewise, the Twelve Apostles are an iconic Victorian destination with over 2.6 million visitors a year, a significant proportion of which are overseas tourists. And yet, in the whole Great Ocean Road region, international overnight visitation stands at 173,000 per annum. These statistics confirm what many of the stakeholders to this inquiry have advised the Committee. They demonstrate that overseas visitors are visiting and staying overnight in Melbourne in ever increasing numbers. Notwithstanding a steady average growth of 3.2 per cent per annum in overnight visitation to regional Victoria across the period of 2010-2014, the dispersal of international overnight visitors into regional Victoria does remain relatively limited. However, international visitors are making day trips to iconic destinations such as Phillip Island, Sovereign Hill and the Twelve Apostles.

Table 1.3 shows international visitor expenditure for the Melbourne region, the total for regional Victoria, and the total for Victoria for the years ending March 2010, 2013 and 2014. N.B. It should be noted that International Visitor Survey expenditure data is allocated to regions based on overnight stopovers. Thus, when an international visitor makes a day trip to a region, but does not stay there, their expenditure is not allocated to that region.

<table>
<thead>
<tr>
<th>Expenditure by International Over-night Visitors</th>
<th>2010 ($ million)</th>
<th>2013 ($ million)</th>
<th>2014 ($million)</th>
<th>Annual Average Change 2010/2014</th>
<th>% change 2013/14</th>
</tr>
</thead>
<tbody>
<tr>
<td>Melbourne</td>
<td>3,281</td>
<td>4,157</td>
<td>4,448</td>
<td>7.9%</td>
<td>7.0%</td>
</tr>
<tr>
<td>Regional Victoria</td>
<td>296</td>
<td>310</td>
<td>316</td>
<td>1.7%</td>
<td>1.9%</td>
</tr>
<tr>
<td>Total Victoria</td>
<td>3,577</td>
<td>4,467</td>
<td>4,765</td>
<td>7.4%</td>
<td>6.7%</td>
</tr>
</tbody>
</table>


---

122 See Phillip Island Nature Parks, submission no. 68, pp. 1-2.
123 See Sovereign Hill Museums Association, submission no. 18, pp. 1-2.
Table 1.3 shows overnight expenditure in regional Victoria was $316 million to the year ended March 2014, a rise of 1.9 per cent on the previous year. For the period 2010 to 2014, the annual average rate of expenditure growth by overnight international visitors in regional Victoria was 1.7 per cent. Expenditure in Melbourne to the year ended March 2014 reached almost four and a half billion dollars, and rose on average from 2010 to 2014 by 7.9 per cent.

These figures indicate the significance of the overseas tourism dollar for the Victorian economy. Rising at a rate of 7.4 per cent per annum on average since 2010, international visitor expenditure in Victoria increased by almost $1.2 billion in just four years.

Overseas visitors to Victoria come from all over the world. However, certain markets now dominate. Table 1.4 shows the top ten source countries for international overnight visitors to Victoria to the year ended March 2014.126

<table>
<thead>
<tr>
<th>International Over-night Visitors to Victoria by country origin</th>
<th>2013 (000s)</th>
<th>2014 (000s)</th>
<th>% change 2013/14</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>293.5</td>
<td>341.1</td>
<td>16.2%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>270.8</td>
<td>283.0</td>
<td>4.5%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>195.1</td>
<td>220.9</td>
<td>13.2%</td>
</tr>
<tr>
<td>USA</td>
<td>135.2</td>
<td>146.7</td>
<td>8.5%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>87.6</td>
<td>99.6</td>
<td>13.7%</td>
</tr>
<tr>
<td>Singapore</td>
<td>81.1</td>
<td>93.9</td>
<td>15.8%</td>
</tr>
<tr>
<td>India</td>
<td>70.3</td>
<td>75.0</td>
<td>6.8%</td>
</tr>
<tr>
<td>Germany</td>
<td>61.4</td>
<td>72.1</td>
<td>17.5%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>51.1</td>
<td>63.7</td>
<td>24.7%</td>
</tr>
<tr>
<td>Canada</td>
<td>37.3</td>
<td>44.0</td>
<td>17.7%</td>
</tr>
</tbody>
</table>


As Table 1.4 shows, China is Victoria’s leading overseas tourist source, with over 341,000 Chinese overnight visitors to Victoria in the year ended March 2014. New Zealand is the next largest group of overseas visitors to the state, with 283,000 visitors to Victoria in the same period. Nearly all

overseas markets experienced strong growth in 2014, with the exception of Japan, which declined by 3.6 per cent.127

1.12 Recent tourism data on Victoria – Domestic visitors

Tourism Victoria publish data based on the National Visitor Survey (NVS) conducted by Tourism Research Australia (TRA).128 This data shows that to the year ended March 2014, there were just under 19.1 million domestic overnight visitors to Victoria, who spent a total of over $10.73 billion in the state. The 19.1 million domestic overnight visitors includes both intrastate and interstate visitors. This figure represents a rise of 6.9 per cent on visitor numbers for the previous year, while the rise in expenditure by domestic overnight visitors was 4.3 per cent in the same period.129

However, Tourism Victoria have stated that the comparison of these 2014 results with previous years does need to be treated with ‘extreme caution’, due to changes to the National Visitor Survey methodology.130 Table 1.5 shows data on domestic overnight visitor numbers for the Melbourne region, the total for regional Victoria, and the total for Victoria for the years ending March 2010, 2013 and 2014. N.B. It is important to note that these figures only capture overnight visitation, not day trip visitation by domestic visitors.

<table>
<thead>
<tr>
<th>Domestic Over-night Visitor Estimates</th>
<th>2010 (000s)</th>
<th>2013 (000s)</th>
<th>2014 (000s)</th>
<th>Annual Average Growth 2010/2014</th>
<th>% change 2013/14</th>
</tr>
</thead>
<tbody>
<tr>
<td>Melbourne</td>
<td>6,439</td>
<td>6,987</td>
<td>7,320</td>
<td>3.3%</td>
<td>4.8%</td>
</tr>
<tr>
<td>Regional Victoria</td>
<td>10,505</td>
<td>11,338</td>
<td>12,341</td>
<td>4.1%</td>
<td>8.8%</td>
</tr>
<tr>
<td>Total Victoria</td>
<td>16,379</td>
<td>17,834</td>
<td>19,069</td>
<td>3.9%</td>
<td>6.9%</td>
</tr>
</tbody>
</table>


Table 1.5 shows that regional Victoria had over 12.3 million domestic overnight visitors to the year ended March 2014, which was rise of almost 8.8 per cent on the figure for the previous year.

127 Ibid.
130 The NVS methodology has changed to include interviews on mobile phones as well as landlines, which has resulted in a break in the time series, see Tourism Victoria, Domestic Visitor Estimates to Victoria: Year ending March 2000-2014, Tourism Victoria Research Unit, Tourism Victoria, accessed 9 July 2014, http://www.tourism.vic.gov.au/component/edocman/?view=document&task=document.download&id=730.
Table 1.5 also shows that overall, regional Victoria has experienced an annual average growth rate from years ending March 2010 to 2014 of 4.1 per cent per annum, while the Victorian total (including Melbourne) for the same period is 3.9 per cent. Of the 11 campaign regions, the Melbourne region is the leading destination for domestic overnight visitation in Victoria, with over 7.3 million domestic overnight visitors to the year ending March 2014, and an annual average growth rate between 2010 and 2014 of 3.3 per cent per annum. The 19.1 million domestic overnight visitors to Victoria for the year ending March 2014 are comprised of just under 6.1 million interstate visitors, and just under 13 million intrastate visitors. Thus, of all overnight traveller types to Victoria – international, interstate and intrastate – Victorians themselves represent the majority of overnight visitors. Table 1.6 shows overnight domestic visitation for all of the 11 campaign regions.

Table 1.6: Domestic Overnight Visitor Estimates to Victoria by Campaign Region
Years ending March 2010, 2013, 2014

<table>
<thead>
<tr>
<th>Domestic Over-night Visitor Estimates</th>
<th>2010 (000s)</th>
<th>2013 (000s)</th>
<th>2014 (000s)</th>
<th>Annual Average Growth 2010/2014</th>
<th>% change 2013/14</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daylesford &amp; the Macedon Ranges</td>
<td>303</td>
<td>413</td>
<td>524</td>
<td>14.7%</td>
<td>26.9%</td>
</tr>
<tr>
<td>Gippsland</td>
<td>1,432</td>
<td>1,565</td>
<td>1,645</td>
<td>3.5%</td>
<td>5.1%</td>
</tr>
<tr>
<td>Goldfields</td>
<td>1,180</td>
<td>1,347</td>
<td>1,354</td>
<td>3.5%</td>
<td>0.5%</td>
</tr>
<tr>
<td>Grampians</td>
<td>592</td>
<td>742</td>
<td>756</td>
<td>6.3%</td>
<td>1.9%</td>
</tr>
<tr>
<td>Great Ocean Road</td>
<td>2,392</td>
<td>2,353</td>
<td>2,736</td>
<td>3.4%</td>
<td>16.3%</td>
</tr>
<tr>
<td>Melbourne</td>
<td>6,439</td>
<td>6,987</td>
<td>7,320</td>
<td>3.3%</td>
<td>4.8%</td>
</tr>
<tr>
<td>Mornington Peninsula</td>
<td>1,022</td>
<td>1,169</td>
<td>1,323</td>
<td>6.7%</td>
<td>13.2%</td>
</tr>
<tr>
<td>Murray</td>
<td>1,654</td>
<td>1,777</td>
<td>1,931</td>
<td>3.9%</td>
<td>8.7%</td>
</tr>
<tr>
<td>Phillip Island</td>
<td>639</td>
<td>691</td>
<td>839</td>
<td>7.0%</td>
<td>21.4%</td>
</tr>
<tr>
<td>Victoria’s High Country</td>
<td>1,183</td>
<td>1,136</td>
<td>1,128</td>
<td>-1.2%</td>
<td>-0.7%</td>
</tr>
<tr>
<td>Yarra Valley &amp; Dandenong Ranges</td>
<td>627</td>
<td>685</td>
<td>666</td>
<td>1.5%</td>
<td>-2.8%</td>
</tr>
<tr>
<td>Regional Victoria</td>
<td>10,505</td>
<td>11,338</td>
<td>12,341</td>
<td>4.1%</td>
<td>8.8%</td>
</tr>
<tr>
<td><strong>Total Victoria</strong></td>
<td><strong>16,379</strong></td>
<td><strong>17,834</strong></td>
<td><strong>19,069</strong></td>
<td><strong>3.9%</strong></td>
<td><strong>6.9%</strong></td>
</tr>
</tbody>
</table>

Tourism Victoria Research Unit, July 2014.

131 Ibid.
Bearing in mind the changes to NVS methodology, Table 1.6 shows that there is significant variation in overnight domestic visitation to the various regions over this period. Outside of the Melbourne campaign region, overnight domestic visitation was strongest in the Great Ocean Road, Murray and Gippsland regions. Regions with closer proximity to Melbourne saw generally lower overnight visitation numbers. Nearly all the regions recorded growth in overnight visitation across the period from 2010 to 2014, with the exception being the High Country, which fell marginally. Meanwhile, the Daylesford and Macedon Ranges region grew overnight domestic visitation on average by 14.7 per cent each year over the period from 2010 to 2014 (admittedly from the relatively low base of 303,000 overnight visitors in 2010). The Phillip Island, Grampians and Mornington Peninsula regions all saw significant growth rates.

Domestic day trip visitor estimates for Victoria for the year ending March 2014 show that there was a total of just under 43 million domestic day trip visitors, a fall of 3.6 per cent on the previous year. Expenditure by domestic day trip visitors is detailed below. Table 1.7 shows total domestic visitor expenditure (including both overnight and day trip expenditure) for the Melbourne region and regional Victoria, and the total for Victoria for the years ending March 2010, 2013 and 2014.

<table>
<thead>
<tr>
<th>Table 1.7: Domestic Expenditure in Victoria</th>
<th>Years ending March 2010, 2013, 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expenditure by Domestic Visitors</td>
<td>2010 ($ million)</td>
</tr>
<tr>
<td>Melbourne (Total)</td>
<td></td>
</tr>
<tr>
<td>Overnight visitors</td>
<td>6,785</td>
</tr>
<tr>
<td>Daytrip visitors</td>
<td>5,106</td>
</tr>
<tr>
<td>Daytrip visitors</td>
<td>1,679</td>
</tr>
<tr>
<td>Regional Victoria (Total)</td>
<td>6,248</td>
</tr>
<tr>
<td>Overnight visitors</td>
<td>4,011</td>
</tr>
<tr>
<td>Daytrip visitors</td>
<td>2,236</td>
</tr>
<tr>
<td>Total Victoria</td>
<td>13,032</td>
</tr>
</tbody>
</table>

Source: Fact Sheet, ‘Domestic Tourism Expenditure in Victoria: Year ending March 2010-2014’
Tourism Victoria Research Unit, July 2014.

Table 1.7 shows domestic expenditure in regional Victoria was $7.21 billion to the year ended March 2014, a rise of 3.7 per cent on the previous year. For the period 2010 to 2014, the annual average rate of expenditure growth by domestic visitors in regional Victoria was 3.7 per cent.

---

132 Ibid.
Domestic expenditure in Melbourne to the year ended March 2014 reached almost $7.9 billion dollars, and rose on average from 2010 to 2014 by 3.9 per cent. Total domestic visitor expenditure in Victoria, including both daytrip and overnight expenditure was $15.11 billion, a rise of 2.1 per cent on the previous year. Bearing in mind the caveat on changes to the NVS methodology mentioned above, this data does show the resilience of the domestic tourism market in Victoria. Victorians themselves remain an important component of this market.

Table 1.8 shows the origins of domestic overnight visitors to Victoria by state and territory, including intrastate overnight visitors.

<table>
<thead>
<tr>
<th>Domestic Over-night Visitors to Victoria by state/territory origin</th>
<th>2010 (000s)</th>
<th>2013 (000s)</th>
<th>2014 (000s)</th>
<th>% change 2013/14</th>
</tr>
</thead>
<tbody>
<tr>
<td>New South Wales</td>
<td>2,520</td>
<td>2,606</td>
<td>2,851</td>
<td>9.4%</td>
</tr>
<tr>
<td>Victoria (Intrastate)</td>
<td>11,006</td>
<td>12,223</td>
<td>12,987</td>
<td>6.3%</td>
</tr>
<tr>
<td>Queensland</td>
<td>1,008</td>
<td>897</td>
<td>962</td>
<td>7.2%</td>
</tr>
<tr>
<td>South Australia</td>
<td>902</td>
<td>880</td>
<td>1,009</td>
<td>14.7%</td>
</tr>
<tr>
<td>Western Australia</td>
<td>288</td>
<td>467</td>
<td>479</td>
<td>2.6%</td>
</tr>
<tr>
<td>Tasmania</td>
<td>344</td>
<td>333</td>
<td>398</td>
<td>19.5%</td>
</tr>
<tr>
<td>Northern Territory</td>
<td>71</td>
<td>75</td>
<td>89</td>
<td>18.7%</td>
</tr>
<tr>
<td>Australian Capital Territory</td>
<td>240</td>
<td>354</td>
<td>294</td>
<td>-16.9%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>16,379</td>
<td>17,834</td>
<td>19,069</td>
<td>6.9%</td>
</tr>
</tbody>
</table>


As Table 1.8 shows, Victoria provides the majority of overnight visitors to the state. Of the other states and territories, New South Wales is the leading tourist source, with just under three million visitors in the period, a rise of 9.4 per cent on the previous year. South Australians are the next largest group of domestic interstate visitors to the state, with over one million visitors to the year ending March 2014. Domestic overnight visitation to Victoria is growing, with only the ACT experiencing a decline in the period.134

The above statistics for international and domestic visitation to Victoria demonstrate the importance of tourism to the Victorian economy. The following are key points:

• Total overnight visitation (domestic and international) to Victoria to year ending March 2014 was over 21 million visitors, a rise of three million since 2010;
• Total expenditure by overnight international visitors and domestic visitors (overnight and daytrip) in Victoria to year ending March 2014 was almost $20 billion, a rise of three and a quarter billion dollars since 2010;
• Chinese visitors are the number one overseas visitor group to Victoria;
• Victorians contribute significantly to the tourism industry of the state, both in terms of visitor numbers and expenditure; and
• International overnight visitation to regional Victoria grew modestly over the period from 2010 to 2014, but remains relatively limited.
Chapter Two

Developing the potential within the ecotourism and heritage tourism industry

It is widely recognised that Victoria has a variety of unique natural and heritage assets that are attractive to both domestic and international visitors, and that there is significant potential to grow visitation further. This chapter discusses a range of factors that have been identified by the inquiry’s stakeholders as important to nurturing the potential of Victoria’s ecotourism and heritage tourism industries. These factors include: The effectiveness of current industry governance structures, especially Regional Tourism Boards (RTBs); approaches to destination marketing; boosting visitation to regional areas; and, engaging with the needs of international visitors. These issues relate to aspects of terms of reference one, three and five, namely:

- Examining the current scope of ecotourism and heritage tourism in Victoria, including the extent to which the current arrangements maximise the benefits to the local industry;
- Examining the potential for the development of ecotourism and heritage tourism in Victoria; and,
- Determining whether the local industry is sufficiently advanced to manage increased tourism and any obstacles to this.

The Committee also heard a significant amount of evidence relating to the importance of infrastructure improvements in developing the potential of Victoria’s ecotourism and heritage tourism industries. Chapter Three is devoted to discussing infrastructure in-depth.

2.1 Governance structures and the Victorian tourism industry

Tourism Victoria is the Victorian Government’s lead agency supporting the tourism industry, reporting to the Minister for Tourism and Major Events. It is also connected to the Department of State Development, Business and Innovation. Tourism Victoria has responsibility for developing and implementing the state’s tourism marketing strategy and takes a lead role in policy development for the sector. In supporting the tourism industry the agency works in partnership with other state government departments and agencies including Parks Victoria, local government, industry representative bodies such as the Victoria Tourism Industry Council (VTIC), and RTBs. The recently established RTBs are designed to assist Tourism Victoria in both identifying and delivering priority projects and policy initiatives for Victoria’s tourism regions.

2.1.1 The role of Regional Tourism Boards

Regional Tourism Boards (RTBs) are a key partner in the Victorian Government’s 2020 and Regional Tourism strategies. The boards are comprised of locally-based stakeholders in the
tourism industry and are designed to provide an overarching strategic vision for each region. There are currently 10 RTBs throughout Victoria covering the following regions:

- Mornington Peninsula
- Daylesford and the Macedon Ranges
- Phillip Island
- Yarra Valley and Dandenong Ranges
- Goldfields
- Grampians
- Great Ocean Road
- Gippsland
- High Country
- The Murray

Although not considered ‘regional’, Melbourne is covered by its own organisation, Destination Melbourne.\footnote{Tourism Victoria, ‘Regional tourism contacts’, Tourism Victoria, accessed on 9 May 2014, www.tourism.vic.gov.au/tourism-industry/industry-contacts/regional-tourism-contacts.html.} The area covered by each RTB corresponds to one of Tourism Victoria’s marketing campaign regions (including Melbourne). In many areas the strategic activities of RTBs are supported by smaller sub-regional or local tourism associations which have a stronger focus on marketing and supporting local operators.


The system of RTBs is still relatively new; at the time of writing a number of RTBs have only been operating for less than 12 months. Further, while some RTBs are long-standing organisations – such as the RTBs for Phillip Island and Gippsland – others are newly created or merged bodies like the Goldfields and Great Ocean Road RTBs. The boards are skills-based and their operations are typically managed by an executive officer and sometimes an administrator/finance officer. Tourism Victoria views RTBs as an important vehicle for giving local industry a role in setting regional priorities, and a key partner in implementing government policy directions.\footnote{Tourism Victoria, \textit{Victoria’s Regional Tourism Strategy 2013-2016}, Victorian Government, Melbourne, 2013, p. 6.}

The Committee has heard from some Regional Tourism Boards, but it is not clear how well resourced these entities are to carry out their functions, and whether they have the capacity to support local tourism initiatives. Operating budgets for RTBs vary, although they are usually financed by a mix of state government, local government and local industry sources. Tourism
Victoria’s newly released Regional Tourism Strategy notes that funding of $13.2 million over four years has been allocated to supporting regional tourism, including RTBs. Another $8 million has been allocated to Tourism Victoria to fund campaign materials and regional events.\(^{138}\)

The Committee found widespread support for the new system of RTBs and a general hopefulness about the capacity of these organisations to play a central role in setting regional priorities and supporting greater cooperation between local government, industry, and Tourism Victoria. At the same time, a range of stakeholders expressed the view that ‘it is early days’ and that the RTBs will need support to develop the capacity of regional tourism operators.\(^{139}\)

Some RTBs have been formed from existing organisations, with significant experience working with tourism operators in the region. For example, Destination Gippsland has operated for five years and, according to Chief Executive Officer, Mr Terry Robinson, undertakes a more ‘active’ role ‘than the old marketing that campaign committees used to do. We are active in advocacy, destination planning, industry development and product development as well as having the traditional marketing role’.\(^{140}\)

Shipwreck Coast Tourism was a local tourism organisation and has recently wound up in preparation for the operation of the new Great Ocean Road RTB. Former Shipwreck Coast Tourism Executive Officer, Ms Carole Reid, described the range of activities undertaken by the organisation that will continue under the new RTB structure:

> We are not just marketing, we are industry development and product development. Domestic-wise we work in partnership with Tourism Victoria. International-wise we have [the] Great Southern Touring Route ... We have been working in partnership for 22 years with the Grampians, so there is the Great Ocean Road, the Grampians and Ballarat. Under the new organisation of the Regional Tourism Board, that will continue.\(^{141}\)

Ms Kathryn Mackenzie, Chair and President of Cultural Tourism Victoria, spoke positively of the new system of RTBs, but also noted that it will take time to see results given the challenges involved in working with operators at the local level:

> I am working with quite a few immature destinations. How you actually grow that destination and really move it forward is really challenging. That does not mean to say that we are not committed to doing it, but I think there are some real challenges around it. We need to look harder at what drives change and what

---

\(^{138}\) Ibid., p. 9.

\(^{139}\) Ms K Mackenzie, Chair and President, Cultural Tourism Victoria, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 283.


\(^{141}\) Ms C Reid, Executive Officer, Shipwreck Coast Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 76.
builds capacity. Marketing is okay, but that is the end result after you have got something really worthwhile to market and something is really happening. 142

The tourism industry representative organisation VTIC is also positive about the introduction of RTBs, but argued in its submission that the structure needs to be ‘cemented’ into the future to provide certainty, including through ‘a clearer statement of roles and increased funding’. 143

The Committee has observed widespread optimism about the new RTBs and their role in growing the potential of Victoria’s tourism industry at a regional level. It acknowledges that although there are concerns about the long-term capacity of these organisations it is too early to assess their impact. The Committee is confident that the RTBs will provide local industry stakeholders with a stronger voice in relation to tourism policy and can provide a platform for local industry to work cooperatively to develop their destinations. Although RTBs are funded from a mix of local, state government and industry sources, given their central role within the state’s tourism strategies the Victorian Government should provide certainty for the new RTBs by committing to recurrent funding to support their operations. Accordingly, the Committee recommends that:

**RECOMMENDATION 2.1**

The Victorian Government commit to providing recurrent operational funding to support Regional Tourism Boards sufficient for them to carry out their expanded functions as recommended by this Committee. In addition, Tourism Victoria will monitor the performance of the new Regional Tourism Boards, with a view to ensuring that the organisations are fulfilling their responsibilities and are appropriately resourced.

2.2 Marketing Victoria’s assets

Tourism Victoria develops statewide and regionally-focused marketing campaigns, and coordinates industry-led promotional activities. To date, the agency has taken a broad approach that focuses on the diversity of Victoria, rather than promoting a select number of ‘iconic’ sites. The Committee heard a mix of views about the effectiveness of Tourism Victoria’s marketing and the ability of the current approach to effectively promote regional destinations.

2.2.1 Tourism Victoria’s promotional campaigns

Developed in 1993, Tourism Victoria’s ‘Jigsaw’ campaign — including the slogan ‘You’ll love every piece of Victoria’ — is designed to highlight the diversity of experiences and sites throughout Victoria. The approach deliberately avoids focusing on a few key icons and instead promotes the breadth of activities available to the visitor in the areas of ‘food and wine, natural attractions,

---

142 Ms K Mackenzie, Chair and President, Cultural Tourism Victoria, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 283.
143 Victoria Tourism Industry Council, submission no. 64, p. 4.
arts, theatre and culture, shopping, special events, skiing and conventions and exhibitions’. The Jigsaw branding is primarily focused on the domestic Australian market and is complemented by targeted campaigns for international markets, particularly in Asia.

The Jigsaw campaign is widely considered to be an innovative and effective marketing strategy, which has been drawn on by other Australian jurisdictions. As Mr Rod Hillman, Chief Executive of industry accreditation organisation Ecotourism Australia noted:

There seems to be a lot of respect for Tourism Victoria [in the ecotourism sector], the way the general marketing campaign is going such as the Jigsaw campaign and Run Rabbit Run and those types of programs, which are being imitated right around Australia. South Australia is certainly taking examples of what you are doing and moving it there.145

Similarly, Mr Jeremy Johnson, Chief Executive Officer of Sovereign Hill, praised the campaign: ‘Tourism Victoria has done an exceptionally good job in pursuing its marketing campaign since the Jigsaw strategy was first invoked and built on by successive governments. It has been a great strength to our state’.146

The Committee found the majority of stakeholders believe that Tourism Victoria’s Jigsaw promotional campaign has been highly successful in the past. However, some witnesses argued that it is now due for renewal to ensure its continued relevance to visitors. Some stakeholders have criticised the lack of focus on their individual product or area, such as Ms Lex Chalmers who argues that the Jigsaw campaign ignores the assets of the south-west beyond the Great Ocean Road.147 Speaking about the usefulness of the Jigsaw campaign Ms Chalmers stated that ‘I think that today the Tourism Victoria lens homogenises the regions, that its Jigsaw-branded regional publications are very uneven and that its staff should get out more to become familiar with differing regions’.148

Further, the Heritage Council of Victoria argues that the Jigsaw campaign is not effective at highlighting heritage attractions. In its submission the group argues that the campaign’s focus on geographic ‘regions’ downplays the fact that key heritage themes — such as the gold rush, agricultural development and migration — are not only present in one ‘region’ but throughout Victoria. In relation to the heritage of the gold rush, the Council argues that:

The Victorian Gold Rush belongs to at least six tourism regions: Grampians, Daylesford and Macedon Ranges, Goldfield (Ballarat, Bendigo), Gippsland, Victoria’s High Country and the Murray. Tourism Victoria website identifies the

146 Mr J Johnson, Chief Executive Officer, Sovereign Hill, Environment and Natural Resources Committee public hearing – Ballarat, 8 October 2013, transcript of evidence, p. 23.
148 Ibid., p. 85.
State’s gold story with only one of these regions, the Goldfields. This lessens the ability to maximise benefits from Victoria’s extraordinary widespread gold history and cultural heritage.149

The Australian branch of ICOMOS (International Council on Monuments and Sites) is also critical of the representation of heritage tourism in the Jigsaw campaign, and argues that Victoria’s heritage attractions need to be more clearly marketed.150 The organisation proposes developing a ‘heritage Jigsaw’, to highlight the diversity of heritage sites and attractions in each region. Australia ICOMOS suggests that:

This would not only enable Tourism Victoria’s current ‘Jigsaw’ campaign to continue to drive people to iconic attractions, but also offer a range of themed heritage experiences across the state, involving short or long itineraries.151

In contrast, Destination Phillip Island is supportive of the Jigsaw campaign, in which the Island is a featured ‘piece’.152

The industry body VTIC was broadly supportive of the Jigsaw campaign and recommended it be revived to more strongly target regional destinations. At a public hearing in Melbourne, VTIC Chief Executive, Ms Dianne Smith stated that:

We need to implement a campaign such as the example of the original Jigsaw ‘You’ll love every piece of Victoria’ ads. They were highly successful, and that was a very long time ago. So we have pushed for something similar which is appropriate to the current situation to focus on regional Victoria, particularly beyond 2 hours from Melbourne.153

Tourism Victoria’s Acting Chief Executive, Mr John Dalton, emphasised to the Committee that the Jigsaw campaign is not designed to promote ‘iconic tourism attractions’, but rather ‘to attract people through the diversity of experiences they can have’ in Victoria.154 Nevertheless some stakeholders felt that already prominent sites received significant attention, particularly key natural attractions. For example Ms Reid, from Shipwreck Coast Tourism, argued that there has been too much emphasis on some icons in the south-west, like the Twelve Apostles, and an insufficient focus on the breadth of activities within the region.155 Similarly, Baw Baw Shire Council felt that destinations and attractions within their municipality were overlooked in Tourism Victoria marketing. Mr Peter Kulich, Economic Development Coordinator with the Council,

149 Heritage Council of Victoria, submission no. 16(a), p. 2.
150 Australia ICOMOS, submission no. 40, p. 5.
151 Ibid., p. 5.
152 Destination Phillip Island Regional Tourism Board, submission no. 25, p. 4.
154 Mr J Dalton, Acting Chief Executive, Tourism Victoria, Environment and Natural Resources Committee public hearing – Melbourne, 7 November 2013, transcript of evidence, p. 89.
155 Ms C Reid, Executive Officer, Shipwreck Coast Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 76.
reported that in working with government ‘there was a lack of understanding or willingness from
departments to necessarily work outside the icons they knew’.\footnote{Mr P Kulich, Economic Development Coordinator, Baw Baw Shire Council, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 292.}

The Committee is aware that inclusion in Tourism Victoria promotional materials requires a
financial contribution from operators. The Committee considers that it is part of the role of RTBs
to engage with local operators and encourage them to participate in local campaign promotional
strategies.

The Committee shares the view of the majority of stakeholders that Tourism Victoria’s Jigsaw
campaign has been an innovative and effective strategy. However, the Committee is concerned
that the agency’s marketing remains relevant and promotes the state’s key heritage and
ecotourism attractions. The Committee believes that RTBs have a crucial role to play in working
with Tourism Victoria to develop the major attractions within their areas and to provide advice on
how to promote regional destinations. In particular, Tourism Victoria and the Regional Tourism
Boards need to highlight the state’s unique ecotourism and heritage tourism sites within the
context of the existing Jigsaw framework. In relation to the Jigsaw campaign, the Committee
recommends that:

**RECOMMENDATION 2.2**

Tourism Victoria, in consultation with the Regional Tourism Boards, regularly updates the
content of the Jigsaw campaign to effectively highlight and promote Victoria’s ecotourism and
heritage tourism attractions.

### 2.2.2 The role of social media

Throughout the inquiry the Committee heard about the importance of social media as a
marketing tool for ecotourism and heritage tourism destinations. Social media covers a range of
internet-based programs that allow users to create and share information, such as Twitter,
Facebook, Instagram and YouTube. Tourism Victoria utilises social media for promotional
purposes both in Australia and in key international markets. In particular Chinese social media
platform Weibo is increasingly viewed as an important tool for engaging with a Chinese-speaking
audience. Within a tourism context, social media can be used by operators to promote their
businesses, but it is also used by visitors to share their experiences with friends and make
recommendations and ‘rate’ their experiences through sites such as TripAdvisor.

Tourism Victoria’s 2020 strategy identifies ‘digital excellence’ as its first priority for building the
tourism sector.\footnote{Tourism Victoria, *Victoria’s 2020 Tourism Strategy*, Victorian Government, Melbourne, 2013, p. 11.} This includes improving the agency’s presence on key social media sites and
developing interactive content that allows visitors to contribute and share their own experiences
within Victoria. The viability of social media as a marketing tool is impacted by the availability of internet access throughout the state, especially Wi-Fi. The issue of developing telecommunications infrastructure to support tourism is discussed further in Chapter Three.

Many of the operators the Committee met with have indicated that social media is increasingly influential within the tourism sector. Mr Peter Johnstone, an ecotour operator based in Lakes Entrance, argued that ‘social media tends to dictate the market a fair amount’, and emphasised the importance of TripAdvisor reviews. Another operator, Mr Michael Leaney, President of the Walhalla and Mountain Rivers Tourism Association, explained how crucial Facebook has become to Walhalla’s businesses:

Even though we are only an association of about 15 members representing about 25 businesses, our organisation spends $2000, which is nearly all of our membership fees, on photography. We employ professional photographers to come up to Walhalla to take lots of photographs when the autumn leaves and cherry blossoms are good. Once we have those photographs, we do not leave them sitting on a DVD in someone’s drawer; we push them out. For instance, we have images on our Walhalla Facebook page. Every day, or every second day, our Facebook page has nearly 5000 people looking at it. We use those people to spread the word about what is going on in Walhalla on a daily basis. It is not a hard sell; it is basically about spreading the love, I suppose you would put it.

Some stakeholders, such as Destination Gippsland, suggested that visitor reviews on TripAdvisor are often more influential to visitors than other markers of difference such as accreditation or star ratings. Mr Terry Robinson, Chief Executive Officer of Destination Gippsland noted that ‘in the end the consumer is looking at TripAdvisor and other things to make decisions’, and that industry needs to be aware of how the site’s reviews can impact on their businesses.

In addition to the marketing advantages of social media, social media is now central to the way that many visitors experience destinations. Ms Sara Quon, Chief Executive Officer of Tourism North East, stated that most travellers now expect good internet access while travelling, as sharing their holiday on social media is an important part of their experience. At a public hearing in Mansfield Ms Quon described social media as central to many tourists’ experiences:

This new visitor’s expectations are very high. They are well researched, they are well travelled and we must deliver an exceptional experience to meet their

---

158 Ibid., p. 12.
159 Mr P Johnstone, Owner and Operator, Sea-Safari on Lakes Explorer, Environment and Natural Resources Committee public hearing – Lakes Entrance, 5 December 2013, transcript of evidence, p. 199.
161 Mr T Robinson, Chief Executive Officer, Destination Gippsland, Environment and Natural Resources Committee public hearing – Lakes Entrance, 5 December 2013, transcript of evidence, p. 203.
162 Ibid., p. 203.
demands. They will tell their family and friends about this experience, often on TripAdvisor and Facebook, provided they have internet and 3G connectivity. 163

Social media is considered by some operators as a way of enriching the experience of visitors, and personalising the interpretation of sites. Tourism stakeholders on the Great Ocean Road are aware of the importance of internet access and are planning to develop:

A series of wi-fi hot spots right along the Great Ocean Road, so that the visitor will be able to stop at places and download detailed information about that specific site, which may even include historic augmentation. You might be able to hold up your iPhone or iPad, look at the Twelve Apostles and then actually have a look at what they look like and how they were developed.164

The use of new technologies to improve the interpretation of ecotourism and heritage tourism sites is discussed further in Chapters Five and Seven.

The Committee believes that Tourism Victoria should draw upon the skills, expertise and resources of the Department of State Development Business and Innovation (DSDBI) to assist with the development and implementation of Tourism Victoria’s ‘digital excellence’ strategy.

Social media is a vital tool for marketing and engaging with visitors, and the Committee is supportive of Tourism Victoria’s commitment to furthering its online presence. The Committee is concerned to ensure that tourism operators — many of whom are small-to-medium businesses — are aware of the advantages of using social media and appropriately skilled to do so. The Committee believes that the Victorian Government is well-placed to provide ICT advice and support to the ecotourism and heritage tourism industry. Therefore, the Committee recommends that:

RECOMMENDATION 2.3

Tourism Victoria in concert with the Department of State Development Business and Innovation and the Victoria Tourism Industry Council work with Regional Tourism Boards to ensure that all Victorian tourism operators have the knowledge and skills — such as through the Tourism Excellence Program — to effectively use social media platforms to promote their ecotourism and heritage products, and engage with visitors.

163 Ms S Quon, Chief Executive Officer, Tourism North East, Environment and Natural Resources Committee public hearing – Mansfield, 21 March 2014, transcript of evidence, p. 358.
164 Mr R Grant, Executive Officer, Geelong Otway Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 54.
2.3 Encouraging regional dispersal

The Committee heard that tourism regions and attractions located more than 2 hours travel time from Melbourne often struggle to attract tourists, particularly from the Asian market. In contrast, sites within this 2 hours travel time window are popular destinations for time-poor visitors. Other witnesses noted that where tourists do venture beyond this radius — to areas like the Great Ocean Road — visitors tend to do so only as a day trip, lowering the economic benefit of tourism to regional areas. For some stakeholders improved marketing of the regions is seen as the key to encouraging dispersal; for others the barriers to increasing visitation lie in the need to improve tourism infrastructure in regional areas, particularly accommodation.

Achieving greater regional dispersal is a key aspiration of Tourism Victoria’s recent policy vision, which aims for tourism ‘to increasingly contribute to the growth of the regional Victorian economy’.165 This view is also shared by industry representative body VTIC, which believes that ‘for many regional communities, increased tourism is essential for their economic future’.166 Increasing ecotourism and heritage tourism is an important way of boosting regional dispersal, given the regional location of many of Victoria’s natural and cultural heritage assets.

For some attractions, such as those located in the Goldfields, proximity to Melbourne is a key strength. At a public hearing in Ballarat Mr Jeremy Johnson, Chief Executive Officer of Sovereign Hill, explained the benefits of being located within ‘a 2-hour radius’ of Melbourne:

We are a very compact state, and when you look within a 2-hour radius or thereabouts of Melbourne a lot of what Australia has to offer as a tourism destination can be found. There are wineries, heritage and surf, and obviously Melbourne is a huge attracting city with its arts and culture. There is environmental tourism and ecotourism at Phillip Island and the Great Ocean Road. Everything is in that 2-hour radius ... 167

Similarly, Mr Chris Meddows-Taylor from the Victorian Goldfields Regional Tourism Executive, noted that ‘having the goldfields within 2 hours from Melbourne is a huge attraction ... The only thing is that proximity can sometimes work against us because we want people to spend and have more overnight stays, too’.168

A range of stakeholders argued that more emphasis should be placed on promoting destinations and attractions outside of Melbourne. Ms Quon, Chief Executive Officer of Tourism North East

166 Victoria Tourism Industry Council, submission no. 64, p. 4.
167 Mr J Johnson, Chief Executive Officer, Sovereign Hill, Environment and Natural Resources Committee public hearing – Ballarat, 8 October 2013, transcript of evidence, p. 22.
168 Mr C Meddows-Taylor, Chairperson, Victorian Goldfields Tourism Executive, Environment and Natural Resources Committee public hearing – Ballarat, 8 October 2013, transcript of evidence, p. 44.
stated that ‘the challenge we have [in the High Country] is that the potential visitor knows very little about Victoria beyond 2 hours drive from Melbourne’.169

At the public hearing in Port Campbell Ms Reid also commented on many Victorians’ lack of knowledge about tourism experiences within the state, noting that:

> With regional Victoria, there is a lot of great product there. Do the consumers in Melbourne know about it? International marketing is a different thing, and 90 per cent of the business is domestic. As we know, international tourism produces three times more money, but we need to try to celebrate regional Victoria, make it appealing.170

Mr Gavin Ronan, operator of the guided walking tour company Bothfeet, suggested that Victoria’s current marketing is too Melbourne-focused:

> Victoria’s core marketing message is really Melbourne centric. It plays Melbourne hard in terms of tourism. The Jigsaw campaign has been around for 20 years now, and that was a great campaign, but we have not really evolved into new thinking in terms of our regions. We need to get people beyond Melbourne. We see people are driving down here in a day and going back in a day; they are not staying in the region. That is the outcome of all of these things, and the consequence is largely unrealised potential.171

VTIC presented a similar view on behalf of their members, arguing that:

> Amongst our membership there is certainly a feeling that there needs to be more of a concerted effort in terms of marketing the regions that fall beyond that two-hour radius. There have been some notable campaigns in the past really pushing those destinations, but industry members feel that currently there is a bit of a lack of focus on that and a bit more of a focus on Melbourne, as opposed to the regional destinations.172

Tourism Victoria has itself noted the need to increase promotion of regions, especially to the intrastate market and aims to ‘establish an intrastate marketing program that creates awareness of the diversity and accessibility of Victoria and the products and experiences on offer’.173

Beyond the issue of marketing, a range of inquiry stakeholders expressed concern about the need to improve the quality of the products and experiences available in Victoria. For many witnesses the key issue impeding regional dispersal is the lack of appropriate accommodation and tourism

---

169 Ms S Quon, Chief Executive Officer, Tourism North East, Environment and Natural Resources Committee public hearing – Mansfield, 21 March 2014, transcript of evidence, p. 359.
170 Ms C Reid, Executive Officer, Shipwreck Coast Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 80.
171 Mr G Ronan, Owner, Bothfeet Walking Lodge, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 63.
As recommended above, the Committee believes that the promotion of regional destinations can improve with input from the newly-created RTBs. The RTBs will also play a role in developing destination management plans to identify tourism infrastructure development priorities, and will provide a focus for local industry stakeholders to cooperatively market their destinations. These issues are addressed further by recommendations in Chapter Three.

In relation to improving the marketing of regional ecotourism and heritage tourism products and destinations, the Committee recommends that:

**RECOMMENDATION 2.4**

Tourism Victoria work with Regional Tourism Boards, the Victoria Tourism Industry Council and local tourism operators to identify market-ready ecotourism and heritage products within Victoria’s regions, and develop regional promotional materials that showcase these attractions.

### 2.4 Meeting the expectations of international visitors

Ecotourism tourism and heritage tourism are viewed as important elements in attracting international visitors to Victoria, and ensuring that visitors have relevant and engaging experiences. The Committee heard that encouraging increased international visitation is a key aspiration of both the sector and a central plank of Tourism Victoria’s recently developed policies. In particular, there is a focus on encouraging overseas tourists to spend time in regional Victoria. Marketing and promotional activities – including via social media – are seen as increasingly important in engaging with international visitors. Cultural awareness training and online marketing in Asian languages are also important steps in encouraging international visitation.

Expanding international visitation from Asia is a key element of the Victorian Government’s 2020 Tourism Strategy. Tourism Victoria aims to encourage Chinese visitors to stay longer in Victoria, particularly in regional areas, and to ‘build on Victoria’s strong education, migrant and business links’ to promote Victorian destinations to Chinese people living in the state. Chinese visitation to Victoria has been growing with 2014 data showing over 341,000 Chinese overnight visitors, representing a 16 per cent increase in visitation on the previous year.
Tourism Victoria has also had a long physical presence in mainland China, and was the first Australian state tourism agency to open an office there to conduct in-market promotion in 1999.174 In terms of marketing, Tourism Victoria has been involved in Super Trade Missions to China and India, and has launched Chinese-specific marketing campaigns, including via social media platform Weibo. According to the agency’s Acting Chief Executive Mr John Dalton, Tourism Victoria ‘features more and more products now on the Chinese app that we run in China on a Chinese website, so that people from China can readily see particular products’.175

Research conducted by Tourism Research Australia demonstrates that one of the main desires for Chinese visitors to Australia is to have a ‘nature-based experience’.176 Tourism Research Australia includes a range of activities as a ‘nature-based experience’, such as visiting beaches, wildlife, bushwalking in national parks and water-based activities like scuba diving and kayaking.177 The Chinese satisfaction survey notes that ‘it is essential that this [nature] experience lives up to their expectations as it affects overall satisfaction’ levels of their trip as a whole.178 Victoria is well-placed to meet the desire for nature-based experiences and capitalise on increased visitation from China.

Tourism Victoria believes that an important barrier to increasing international visitors to regional areas is the current quality of experiences and products on offer. According to research commissioned by Tourism Victoria:

> The Chinese short-term visitor experience doesn’t always live up to expectations due to issues relating to cultural understanding, inadequate Chinese language services and limited tourism experiences tailored to the Chinese market ... Long-term success cannot be achieved by simply marketing existing services to Chinese visitors. They have to be adapted and customised towards the needs of the market.179

The agency cites improving Chinese language services and cultural awareness as a key priority for enhancing visitors’ experiences.180 General product development is also considered important, including improving the quality of amenities at tourist sites, accommodation and hospitality services. The importance of infrastructure to boosting international tourism is discussed further in Chapter Three.

The Committee heard that the Chinese market is currently dominated by package tours to Melbourne, with visitors often undertaking daytrips to sites such as Sovereign Hill, Phillip Island Nature Parks and the Great Ocean Road. This focus on day-tripping yields a low economic benefit to regional communities. According to the China Strategy, ‘nights in regional areas account for

---

175 Mr J Dalton, Acting Chief Executive, Tourism Victoria, Environment and Natural Resources Committee public hearing – Melbourne, 7 November 2013, transcript of evidence, p. 91.
177 Ibid., p. 22.
178 Ibid., p. 5.
180 Ibid., p. 6.
only three per cent of the total nights spent in the State [by Chinese visitors]. The Victorian Government’s long-term goal is to encourage Chinese visitors to explore outside Melbourne, as is common with visitors from Hong Kong and Taiwan. This involves catering for the increasing number of independent Chinese travellers who are organising their own travel outside the tour group market.

The Committee heard that the concept of ‘China readiness’ is important to the inquiry’s stakeholders. At the same time there are operators aware of the need to engage the rapidly expanding international markets in India and South-East Asia. The Committee found that Sovereign Hill is a leader in engaging Chinese visitors, through Chinese-language information and heritage interpretation materials, cultural awareness training for staff, and via in-market promotional activities. At a public hearing in Ballarat, Mr Johnson, Chief Executive Officer, outlined Sovereign Hill’s Chinese programs:

In 1993 we employed our first Mandarin-speaking guides, and since then, we have constantly had Mandarin-speaking guides. It is a necessary commitment if we are serious in Victoria about addressing what that market needs. We have to provide the wherewithal for smaller operators to upskill in that space, even in the most basic of communications. I do not think we [Victoria] are doing that well enough at the moment. There are not enough opportunities for smaller operators to access, for example, resources that might allow them to produce their brochures, constantly review them, upgrade them and ensure that they are not saying the wrong things when they are translated into Mandarin.

Tourism Victoria noted its involvement in developing the China-readiness of Victorian operators. At a public hearing in Melbourne, Ms Chris White, explained the support available to operators seeking to improve their products for Chinese tourists:

In partnership ... with Tourism Australia and also the Australian Tourism Export Council we have worked with the industry to undertake a range of workshops, both in Melbourne and also in regional Victoria. They have been incredibly well attended by the tourism industry. They are very practical workshops aimed at up-skilling individual tourism businesses and also employees of those businesses in how to become China-ready, as John said, in relation to cultural practices, training the industry in how they should deal with Chinese visitors and getting a really good understanding of their expectations, down to basic things like how long they will actually spend at a tourism product and not being offended if they seem to come in and 20 minutes later they are having to go off to the next experience. So it has been a great program, run out over the last 12 months. It is an ongoing part of

---

181 Ibid., p. 9.
182 Ibid., p. 9.
183 Mr J Johnson, Chief Executive Officer, Sovereign Hill, Environment and Natural Resources Committee public hearing – Ballarat, 8 October 2013, transcript of evidence, p. 25.
trying to up-skill the industry and ensure that they are ready to cater to the Chinese market.\footnote{Ms C White, Group Manager, Product Marketing, Tourism Victoria, Environment and Natural Resources Committee public hearing – Melbourne, 7 November 2013, transcript of evidence, pp. 91-92.}

Tourism Victoria delivers China-readiness programs in conjunction with the Australian Tourism Export Council, which has developed the Welcoming Chinese Visitors program. The program provides participants with knowledge about the expectations of Chinese tourists, a general knowledge of Chinese culture and basic language skills.\footnote{Australian Tourism Export Council, ‘Welcoming Chinese Visitors’, Australian Tourism Export Council, accessed 9 May 2014, www.atec.net.au/welcoming-chinese-visitors1.html.} It has been developed with input from the China Ready & Accredited program, a Chinese-based company and provides training for both individuals and businesses within a range of sectors, including tourism. These programs have been supported and endorsed by the Australian Government’s TQUAL standards.\footnote{China Ready & Accredited, ‘Australia’, China Ready & Accredited, accessed 8 May 2014, http://chinareadyandaccredited.com/content/australia.}

The Committee heard from Tourism Tasmania that none of the Australian jurisdictions are sufficiently prepared to cater to growing numbers of Chinese tourists. For Ms Gill Parssey, Manager of Tourism Product and Planning with Tourism Tasmania, improved hospitality — especially food — is the key to attracting Chinese visitors:

> China Ready is absolutely about the food and then it is about culture. It is more about the food than it is about anything else. If you do not have the hospitality industry in tandem with any work you do on China Ready it is not going to be successful because it is intrinsic to the satisfaction, meeting the needs of the Chinese market.\footnote{Ms G Parssey, Manager Tourism Product and Planning, Tourism Tasmania, Environment and Natural Resources Committee public hearing – Hobart, 13 February 2014, transcript of evidence, p. 238.}

The Committee also heard about the need for operators to be aware of the changing nature of the Chinese market as the sector expands to include more independent travellers, and the need to target other international visitors in tandem with China. At a public hearing in Melbourne, Dr Rosalind Jessop explained the approach of Phillip Island Nature Parks:

> Looking ahead, as that [Chinese] market matures people tend to move from the mass market down to the independent travel market, so we are trying to target those. Our focus is moving from China — we still have people in China; we have our own people in China, booking people and going around to the travel agents and still getting those people to come. But we are ramping up in India to try to look at that market and in Asia. We are just trying to keep ahead of the wave ... \footnote{Dr R Jessop, Environment Manager, Phillip Island Nature Parks, Environment and Natural Resources Committee public hearing – Melbourne, 7 November 2013, transcript of evidence, p. 116.}

Some stakeholders emphasised the need for tourist experiences to be packaged and sold to international visitors in a ‘seamless’ way. Phillip Island Nature Parks outlined their approach to ‘packaging’ products for the international market, which aims to create a seamless experience for travellers and increases length of stay by involving a number of operators working together to
deliver a packaged experience. The organisation has had particular success in the Singapore and Malaysia markets with a three park pass that includes entry to the penguin parade, the koala park and Churchill Island, and has also worked with the local chocolate factory and company A Maze ‘N Things to develop a destination package.189

The Committee also heard about the importance of providing a seamless experience for tourists in terms of ease of access and transportation, and heard evidence about an operator who regularly drives international visitors from Melbourne Airport at Tullamarine to Mansfield.190

The Committee is aware that both Tourism Victoria and Tourism Research Australia have conducted extensive research relating to the expectations of international visitors and that Tourism Victoria tailors their marketing campaigns accordingly. However, the Committee is concerned to ensure that Victoria’s ecotourism and heritage destinations receive specific attention within international promotional efforts, given the demonstrated demand for these products from international —especially Chinese — visitors.

In this way, the Committee recommends that:

**RECOMMENDATION 2.5**

Tourism Victoria specifically develops promotional materials for international markets that highlight Victoria as a leading destination for ecotourism and heritage experiences.

The Committee observes that Tourism Victoria, in conjunction with industry bodies such as VTIC and the Australian Tourism Export Council, has taken a lead role in developing programs to provide information and training for tourism operators working with Chinese visitors. Victorian operators have a great opportunity to benefit from increased international visitation. This is especially the case for ecotourism and heritage operators, given the demand for engaging experiences from Chinese tourists. In order to support ecotourism and heritage operators to engage with the growing international market, the Committee recommends that:

**RECOMMENDATION 2.6**

Tourism Victoria works with Regional Tourism Boards to ensure that local tourism operators are aware of international visitor satisfaction research, and the demand from Chinese visitors for nature-based experiences. Tourism Victoria will also continue to offer China readiness programs to assist operators to tailor their products to meet the expectations of this growing sector.

---

189 Ms K Storey, General Manager, Destination Phillip Island, Environment and Natural Resources Committee public hearing – Melbourne, 7 November 2013, transcript of evidence, p. 117.

190 Ms S Quon, Chief Executive Officer, Tourism North East, Environment and Natural Resources Committee public hearing – Mansfield, 21 March 2014, transcript of evidence, p. 361
The Committee understands that the participation of tourism-dependent businesses — such as those in the hospitality, retail and accommodation sectors — is essential to creating a welcoming atmosphere for international tourists. As discussed above, research demonstrates that while in Australia visitors from mainland China expect to be able to find familiar food and receive tourist information materials in Chinese. As a result, the Committee recommends that:

**RECOMMENDATION 2.7**

Tourism Victoria works with Regional Tourism Boards to engage tourism-dependent businesses to provide welcoming and culturally appropriate services to international visitors. Tourism Victoria will offer their China readiness programs to operators in the hospitality, accommodation and retail sectors.
Chapter Three

Infrastructure for ecotourism and heritage tourism and workforce skills and development

This chapter examines the current state of ecotourism and heritage tourism infrastructure and the workforce skills capacity of the local tourism industry across Victoria. It is particularly concerned with evidence that suggests that there are significant infrastructure shortfalls in the state, and skills and training shortages in some areas. The chapter’s discussion of infrastructure also includes an examination of accommodation, signage and technological infrastructure, followed by a section focused on workforce skills and training. The chapter begins with an overview of the policy context. As such, the chapter responds to terms of reference one, three and five, namely:

- Examining the current scope of ecotourism and heritage tourism in Victoria, including the extent to which the current arrangements maximise the benefits to the local industry;
- Examining the potential for the development of ecotourism and heritage tourism in Victoria; and,
- Determining whether the local industry is sufficiently advanced to manage increased tourism and any obstacles to this.

3.1 Tourism infrastructure policy context

The policy context for tourism infrastructure support was recently articulated in the Victorian Government’s Victoria’s 2020 Tourism Strategy (‘the 2020 Strategy’), and in the Victoria’s Regional Tourism Strategy 2013-2016 (‘the Regional Strategy’). Priority six of the 2020 Strategy focuses on infrastructure support and investment. It states that new investment and infrastructure is required to realise the products and services that will deliver a positive visitor experience, particularly in relation to the new markets of Asia. The 2020 Strategy identifies a critical role for Regional Tourism Boards (RTBs) in providing advice and guidance on regionally significant priorities.192

State priority projects to be facilitated and supported include: Support for major investment in priority regions, with an initial focus on the Great Ocean Road; support for the upgrade of major attractions to ensure they are recognised as internationally acclaimed experiences; support for the upgrade of tourism port infrastructure; support for the establishment of infrastructure in

---

roads, transport and signage to take advantage of increased visitor numbers with a focus on diverse markets; support for investment in nature-based tourism products such as high end walking experiences and associated accommodation development; the release of the Victorian Trails Strategy; and, support for the development of regional destination management plans.  

The Regional Strategy states that a number of regional tourism assets are ageing, and that there is a need to build on the tourism product and accommodation already available to influence day visitors to extend their stay. Actions identified by the Regional Strategy include:

- To work with the private sector to encourage the expansion of tourism investment infrastructure, and to attract capital for investment projects;
- To facilitate and support the upgrade of infrastructure to meet the needs of the international market;
- To work with the Department of Environment and Primary Industries (DEPI) to identify Crown land suitable for investment, and to support DEPI in the ‘expressions of interest’ process for tourism investment in national parks; and,
- To support developments, aligned with destination management plans, to attract high yield visitation to priority areas, such as the Great Ocean Road.

Both strategies identify four major areas of government commitment within infrastructure and investment.

3.2 Infrastructure for ecotourism and heritage tourism

In generic terms, tourism infrastructure comprises two essential elements. The first is direct tourism infrastructure, such as accommodation, signage, trails, tracks, information and interpretation centres – all the physical and associated paraphernalia that provides the basis for the use and enjoyment of tourism assets. The second form of tourism infrastructure is more indirect, such as roads, rail and bus transport, air services, ports, power, telecommunications, and water and waste services, all of which will normally have multiple users, including the tourism industry.

The evidence presented to, and heard by, the Committee from across Victoria suggests that for both heritage tourism and ecotourism there is a significant infrastructure ‘shortfall’ in both types of tourism infrastructure that is seriously impeding the development of these market segments of tourism. There are multiple issues here. For heritage tourism there is the ongoing and particular issue of resourcing the maintenance of old structures and buildings. For ecotourism, there is a

---

193 Ibid., p. 22.
195 Ibid., p. 23.
lack at key destinations of high-end, high-yield sustainable eco-accommodation that is attractive to both international and national tourists. In some areas of the state infrastructure needs are centred on adequate access, while in others the needs are in relation to road infrastructure, water quality, port access or adequate and consistent signage. According to the Mount Alexander Shire Council:

The infrastructure to service heritage and ecotourism products is inadequate. Services such as campsites, toilets, signage, looped trails and public transport to service eco-tourists are either below standard or not available. In particular, many would not fit current guidelines for accessibility and so are unable to be accessed by the entire community.\textsuperscript{197}

For the Yarra Ranges Council, infrastructure needs in their region are at a ‘tipping point’, as the Council explained in its submission:

Current nature-based tourism infrastructure, especially secondary roads, the Lilydale to Warburton Rails Trail managed by Council and the public gardens, trails and facilities managed by Parks Victoria in the Dandenongs (especially the 1,000 Steps) are at a tipping point in terms of the quality of these assets and the resources required to maintain their use.\textsuperscript{198}

The standards of ecotourism and heritage infrastructure across the state vary significantly. While the Melbourne region and major destinations nearby, such as Sovereign Hill, have substantial and good quality infrastructure, in some regions key stakeholders report serious shortages and inadequacies. For example, in the Gippsland Lakes basic infrastructure at some sites is in disrepair. According to the Gippsland Lakes Ministerial Advisory Committee the quality of infrastructure around the lakes is holding back the industry and is relatively poor, particularly at some sites. At a public hearing at Lakes Entrance, the Executive Officer of the Advisory Committee, Mr Martin Richardson, stated:

The Rotamah bird observatory does have some funding to refurbish the building. The facilities over there are just shocking. The boardwalks are falling apart, the signage is not that flash and the paths are not well made. It is just basic cost-effective investment in that sort of infrastructure. When you go to places like Wattle Point and other nice little barbecue areas around the lakes where people can enjoy and interpret the environment, the barbecues are falling apart and the picnic tables are not that flash. It is basic infrastructure.\textsuperscript{199}

The Chief Executive Officer of Destination Gippsland, Mr Terry Robinson, echoed these views. He stated that in and around the Gippsland Lakes ‘there is a lot that can be done to improve boating access, whether it be ramps, pump stations, fuelling stations et cetera’.\textsuperscript{200} He went on to say that

\textsuperscript{197} Mount Alexander Shire Council, submission no. 66, p. 2.
\textsuperscript{198} Yarra Ranges Council, submission no. 59, p. 13.
\textsuperscript{199} Mr M Richardson, Executive Officer, Gippsland Lakes Ministerial Advisory Committee, Environment and Natural Resources Committee public hearing – Lakes Entrance, 5 December 2013, transcript of evidence, p. 193.
\textsuperscript{200} Mr T Robinson, Chief Executive Officer, Destination Gippsland, Environment and Natural Resources Committee public hearing – Lakes Entrance, 5 December 2013, transcript of evidence, p. 204.
there is ‘not just one element here, but the lakes as a boating hub have a lot of opportunities for improvement’ and that ‘an infrastructure base will drive that’. Mr Robinson also addressed the example of Wilsons Promontory, rhetorically asking ‘where is the high-standard accommodation and where is the dining capability in a world-class facility?’

In the west of the state a key destination for both national and international tourists is the Twelve Apostles. Yet this site has severe infrastructure constraints that involve accommodation, access, interpretation and services. According to the Executive Officer of Shipwreck Coast Tourism, Ms Carole Reid, the Twelve Apostles experience is ‘seriously diminished because of the infrastructure and the service that is there’, and there is no infrastructure at all at the Bay of Islands. The region has the tourism assets, both natural and human-made, but needs infrastructure investment to be developed. At the Port Campbell public hearing Ms Reid stated that:

I just wanted to say this region has well-preserved heritage assets. It has its streetscapes, buildings, gardens, the stone wall network, Aboriginal culture, shipwreck history and the Great Ocean Road. But investment in infrastructure, interpretation and marketing is required to develop it into a marketing product. Until we get our product right we will really not have those hooks that will say to someone coming into Melbourne, ‘Yes, I will get in a car’. If you are someone from overseas or you are in Melbourne, you have a lot of choice of where to go.

A lack of infrastructure impinges on economic performance. The Corangamite Shire Council told the Committee that tourists were visiting the Twelve Apostles, but then leaving the Shire without staying overnight, a fact directly related to an absence of relevant infrastructure, including interpretation centres, accommodation, road links and transport options. The Executive Officer of Geelong Otway Tourism, Mr Roger Grant, told the inquiry that appropriate and sympathetic infrastructure that enhances the tourism experience was needed to generate the level of economic activity the region needs.

Gannawarra Shire also sees its tourism potential not being adequately developed due to infrastructure and capacity constraints. The Shire believes ‘that industry development and capacity building, upgrades and enhancements of tourism infrastructure and products, and clear strategic directions for tourism will be crucial to the sustainable growth of heritage tourism and ecotourism in the shire’, a view that was also expressed by the Baw Baw Shire Council in its submission.

---

201 Ibid., p. 204.
202 Ibid., p. 204.
203 Ms C Reid, Executive Officer, Shipwreck Coast Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 77.
204 Ibid., p. 78.
205 Ms M Dougherty, Planning Officer, Corangamite Shire Council, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 46.
206 Mr R Grant, Executive Officer, Geelong Otway Tourism, Environment and Natural Resources Committee public hearing – Melbourne, 25 October 2013, transcript of evidence, p. 55.
207 Gannawarra Shire Council, submission no. 28, p. 6.
208 Baw Baw Shire Council, submission no. 46, p. 3.
The Committee also heard some evidence about the potential to increase the use of helicopters, both for air access to remote areas and for guided ecotourism flights. At the public hearing in Mansfield, Ms Judy Dixon, Deputy Manager, Tourism and Economic Development for Mansfield Shire, suggested that helicopters could be used to access eco lodge accommodation and transport goods within the Alpine National Park ‘with minimal environmental or user group impacts’. Mr Michael Watson also mentioned the potential for helicopters to be used in the High Country as ‘part of a high-end experience’ to improve access to the most remote areas of the park. The Committee is aware of the use of helicopters for flights along the Great Ocean Road, and for servicing walking huts along the Overland Track in Tasmania. The Committee understands that air services attraction is part of Tourism Victoria’s 2020 Strategy, although this is focused on securing international flights into Melbourne and Avalon Airports. The Committee believes there is potential to increase the use of helicopters, particularly in the development of high-yield ecotourism experiences. The Committee did not receive evidence relating to the use of light aircraft and regional airports. The Committee believes that regional airports do have the potential to increase access and tourism visitation to the state’s regional areas, especially from international visitors.

In a broader sense infrastructure is also about the tourism ‘experience’. For many stakeholders a lack of interpretive centres is clear at key destinations, which offer the site but without the interpretation of the site, its multiple stories and connection to local culture, history, and heritage. For the Central Goldfields Shire Council, tourism potential will be realised by a focus on infrastructure, product development, and capacity building – local heritage and tourism products will need to be brought under ‘the umbrella of a focussed regional vision with a clear goal’, with key projects to include streetscape design and enhancement, touring routes and trails, better transport connections, accommodation and facilities, connecting tourism with events, and stories and signage. The Victorian Goldfields Tourism Executive stated that while some areas in its region were well-placed others need ‘a lot more investment’. In their submission the Victorian Goldfields Tourism Executive further stated that:

All areas could benefit from more investment, not just in attractions and accommodation, but supporting infrastructure such as food and wine, interpretation, visitor services and industry development. The one area of tourism infrastructure that is truly regional is the existing touring and trail infrastructure and the potential to further develop these offerings... The Goldfields Track will become one of Australia’s great walks with further infrastructure development.

Likewise, the Heritage Council of Victoria referred in its submission to a recent report that stressed the importance of infrastructure to the development of heritage tourism in the Goldfields region. The report recommended improving streetscapes, civic precincts, information

---

212 Central Goldfields Shire Council, submission no. 4, p. 2.
213 Victorian Goldfields Tourism Executive, submission no. 63, p. 8.
and interpretation and the restoration and creative reuse of goldfields related buildings while, at
the same time, developing accommodation, tracks and attractions, and the use of new
technologies to help attract and inform visitors.214

The theme of developing new types of tourism infrastructure to accommodate the changing
demands of tourists was taken up by Phillip Island Nature Parks. Environment Manager for Phillip
Island Nature Parks, Dr Jessop, told the Committee that the focus for the future would be on
developing authentic, immersive, nature-based experiences, with a consequential shift needed to
courage more high-yielding individualised tours and events.215 Dr Jessop stated that:

State investment in infrastructure such as iconic visitor centres like the Penguin
Parade needs to be on a regular cycle. For example, the Penguin Parade visitor
centre was constructed in 1987 and no longer meets the needs of today’s
international and domestic visitors. It is often commented on in our surveys that
the visitor centre is out of date. New visitor centres need to embrace and become
centres for new communication technologies like Facebook, and we have been
developing a lot of apps to assist us.216

Dr Jessop also stated that basic infrastructure maintenance was still critical, with walkways,
boardwalks and staircases subject to erosion. Visitors now expect a higher standard of
infrastructure, but ‘committees of management may not be able to afford the upkeep of things
like car parks, toilet blocks and staircases’.217 The issue of visitor expectations in parks was also
taken up by the Wellington Shire Council in its submission. Commenting on the role of Parks
Victoria, the Council stated that:

The current scope of eco tourism in Victoria is essentially "left" to Parks Victoria to
deliver. Whilst this is primarily the responsibility of this department, there often
appears to be a conflict in relation to the level of "preservation" and "protection"
of the asset, compared to improving and creating facilities and services more in
tune with current visitor expectations. Whilst some attempts have been made to
provide "top end" facilities, such as five star tent accommodation, and Parks
Victoria staff hosted tours etc at certain specific locations, the facilities desired by
day visitors to parks and weekend campers have not appeared to have "kept up"
with current customer expectations.218

The Council went on to illustrate this point with discussion of the condition of visitor facilities at
Tarra Bulga National Park. According to the Council the Parks Visitor Centre in the park in unable
to be staffed, with community volunteers performing interpretive and liaison work instead. The
Council further stated that, ‘aged and environmentally inappropriate "long drop" toilets remain in
place along the 90 Mile Beach at many campgrounds; campgrounds that are in only average
states of repair due to heavy visitation and usage’.219

---

214 Heritage Council of Victoria, submission no. 16b, pp. 2-3.
215 Dr R Jessop, Environment Manager, Phillip Island Nature Parks, Environment and Natural Resources Committee
public hearing – Melbourne, 7 November 2013, transcript of evidence, p. 112.
216 Ibid., p. 112.
217 Ibid., p. 112.
218 Wellington Shire Council, submission no. 12, p. 2.
219 Ibid.
In relation to the state’s national parks, Parks Victoria does see its role in providing a ‘base level of tourism infrastructure’ and access for tourists to visit Parks Victoria sites. At a Melbourne public hearing the General Manager (Visitors and Community) of Parks Victoria, Mr Ian Christie, stated that a high level of investment was made by Parks Victoria in providing parks infrastructure, such as roads, tracks, lookouts, visitor information, accommodation, and camping grounds. He went on to say that there were real challenges in managing such a huge estate, with an asset portfolio estimated at $1.9 billion. He stated that:

Challenges in general are about Parks Victoria sustainably managing the huge portfolio of infrastructure and assets that underpin and support regional tourism — the volume, the number... Unfortunately historically over many decades the state has underinvested in that. It is a real challenge for us, and we are looking at innovative ways of generating more revenue — private investment in parks and cost recovery — to help support the underpinning of the tourism offer not only to Victorians but to interstate and international visitors.

In the Victorian Budget 2014-15, an extra $13.4 million (over four years) was allocated for upgrades to visitor amenities in national parks, state forests and public land, with the specific purpose of encouraging tourism. Also announced in the budget were regional infrastructure upgrades and works, such as the $50 million upgrade to the Great Ocean Road from Torquay to Allansford, which would either directly or indirectly enhance tourism infrastructure.

The Committee is concerned that there are significant infrastructure shortfalls across the state that are acting as a serious constraint on the development of ecotourism and heritage tourism in Victoria. As Chapter One showed, these two segments of the tourism sector are dynamic areas of growth, with ecotourism in particular asserted to be the fastest growing tourism segment in the world. Given the critical role that tourism will play in the national and state economies — particularly in the wake of the end of the mining boom and the relative decline of manufacturing — it is incumbent upon industry stakeholders, governments and agencies to work collaboratively towards maximising the potential of this sector.

It is vital that Victoria, as one player in a highly competitive and global market, has the infrastructure and services to be able to match and grow demand in ecotourism and heritage tourism in a sustainable manner. The infrastructure needs for ecotourism and heritage tourism are both direct and indirect, and the Committee is of the view that a coordinated approach must be taken in addressing these shortfalls.

The evidence presented to this inquiry suggests that while Victoria possesses outstanding natural and heritage assets, it is not currently maximising their potential to attract higher levels of visitation, particularly in the regions. The infrastructure shortfalls identified by this inquiry occur

---

220 Mr I Christie, General Manager, Visitors and Community, Parks Victoria, Environment and Natural Resources Committee public hearing – Melbourne, 7 November 2013, transcript of evidence, p. 97.
221 Ibid., p. 98.
223 Ibid., pp. 8-9.
on many levels. As the preceding evidence shows, at some destinations there is a lack of basic infrastructure, with facilities, such as toilets, tracks and camping grounds, that are ageing and poorly maintained. There is the ongoing issue of maintenance and upkeep for the state’s heritage assets, and port and boating facilities for ecotourism are substandard at some destinations. Key iconic destinations, such as the Twelve Apostles, simply do not possess the infrastructure (or services) that are needed to support and engage current levels of visitation, let alone the projected levels of growth for in-bound international tourists.

The Committee supports the priority infrastructure projects as outlined in the 2020 Strategy and the Regional Strategy, and the role of RTBs in providing advice and guidance on regionally significant priorities. The Committee is of the view that a market-driven approach, involving the collaboration of local advocates, can identify local infrastructure priorities, provided that these priorities are in alignment with state based strategies and priorities. Regional Tourism Boards will therefore collaborate with local heritage and ecotourism operators, Parks Victoria, Tourism Victoria, local shires and other stakeholders to identify infrastructure priorities that will enhance the development and sustainable growth of ecotourism and heritage tourism in their regions. Once identified, these priorities will become part of each region’s destination management plan. Accordingly, the Committee recommends that:

RECOMMENDATION 3.1

Regional Tourism Boards collaborate with local heritage and ecotourism operators, Parks Victoria, Tourism Victoria, relevant Victorian Government departments, local government, the Victoria Tourism Industry Council, and other stakeholders to identify infrastructure priorities that will enhance the development and sustainable growth of ecotourism and heritage tourism in their regions.

• Once identified, these infrastructure priorities will become part of each region’s destination management plan.

The Committee appreciates that there are budgetary implications in addressing these infrastructure shortfalls across the state. Funding models and investment attraction for ecotourism and heritage tourism projects will be the subjects of Chapters Four and Five. However, without pre-empting that discussion, the Committee is of the view that the state has a role in funding infrastructure projects to support and enhance ecotourism and heritage tourism. It welcomes the funding announced in the current state budget for upgrades to visitor amenities in national parks, state forests and public land, and the regional infrastructure projects that will indirectly support ecotourism and heritage tourism.

The Committee is particularly concerned that cornerstone projects, such as interpretation centres at key destinations, are often beyond the capacity of local regions to fund and develop. While not ruling out private investment in such ventures, the Committee supports the views of stakeholders, such as Phillip Island Nature Parks, that iconic visitor centres like that of the Penguin Parade need to be on a cycle of prioritised state investment. For the Shipwreck Coast, state involvement would be critical in the development of a cutting-edge interpretive centre,
which combines ecological and heritage narratives. Accordingly, the Committee recommends that:

**RECOMMENDATION 3.2**

The Victorian Government assist in the funding and/or facilitation of regionally identified infrastructure priorities that will enhance the development and sustainable growth of ecotourism and heritage tourism across the state.

- Large-scale infrastructure projects, such as interpretation centres at iconic destinations, should be appropriately maintained.

### 3.2.1 Accommodation

The Committee heard evidence from operators and industry representatives that the tourism sector lacks adequate accommodation, particularly in regional areas. While the Melbourne region is currently generally well catered for, and some areas in the regions have a diversity and range of accommodation, across the state there is a lack of adequate accommodation to expand the industry at the appropriate standard, and generate economic activity. There are various types of accommodation that are ‘missing’ in the landscape, such as hotels that can accommodate large numbers of international tourists in regional heritage centres like Ballarat; medium-scale regional hotels to encourage overnight stays near iconic nature-based sites; and smaller boutique eco-lodges/hotels that can cater for the high-yield market in hard-to-access or remote natural areas. As noted above, both the 2020 Strategy and the Regional Strategy recognise the need for the facilitation of the development of new and diverse accommodation to meet the needs of an expanding market.

The Yarra Ranges Council told the inquiry that the Dandenongs have accommodation ‘gaps’ in two areas; budget accommodation for families at one end, and higher end accommodation at the other. For the Sovereign Hill Museums Association a lack of accommodation at the regional level represents a substantial problem for regional dispersal, and mitigates against regional growth in the heritage and ecotourism sectors. Tourism Victoria concurs with this view, arguing that it is critical to increase the quality and size of accommodation beyond the two hours journey time from Melbourne, and to increase overnight stays at destinations such as Phillip Island and the Twelve Apostles. To this end the agency has ‘an investment area within Tourism Victoria that is focused on attracting that investment in partnership with Tourism Australia. There have

---

224 Yarra Ranges Council, submission no. 59, pp. 3, 14.
225 Sovereign Hills Museum Association, submission no. 18, pp. 4-5.
226 Mr J Dalton, Acting Chief Executive, Tourism Victoria, Environment and Natural Resources Committee public hearing – Melbourne, 7 November 2013, transcript of evidence, p. 92.
been various grants from the federal government to encourage firms to increase the quality of their accommodation’.  

In their submissions, both the Mansfield Shire Council and Tourism North East identified a gap in accommodation offerings in their region. With visitors increasingly seeking accommodation that adds richness to their stay, and helps them ‘feel closer to nature’, there is a need to develop unique accommodation that is in sympathy with nature – such accommodation would showcase the region’s unique natural assets, including forested environments and the night sky. Mildura Tourism stated that ‘opportunities to better access and appreciate the region’s natural assets could be maximized with the development of suitable and sensitive eco-friendly high standard accommodation such as wilderness lodges’, along the Murray.

The Corangamite Shire Council also sees investment in accommodation infrastructure as critical, with the need for a broader ‘accommodation pallet to improve yield and meet current and projected demand’. For the Chief Executive Officer at Sovereign Hill, Mr Johnson, the accommodation issue from Ballarat’s perspective is centred on a lack of a 4-star hotel of substantial size that could attract international groups to stay overnight rather than in Melbourne. Mr Johnson went on to discuss the critical importance to Victoria of catering to the expanding Chinese market.

Our market in China has been impacted on strongly. For example, when the Australian Open tennis is on, China cannot get into Melbourne so Chinese visitors go elsewhere. That is a big risk for Victorian tourism. We need to look at ways of accommodating particularly the China market at times when there are heavy loads on our accommodation in Melbourne — grand prix time, tennis time, AFL finals time, racing time. There are some real peaks there that we have to deal with to ensure that we do not lose market share in China to other Australian states.

Mr Johnson also commented on other areas of the state in relation to accommodation issues, saying that, in particular, accommodation issues along the Great Ocean Road have to be addressed, and not be continually put ‘into the too hard basket’; he stated that he wanted opportunities for accommodation development by the private sector on either private land or with long term leases on public land. The lack of relevant, quality and an appropriate quantity of accommodation in the Twelve Apostles/Port Campbell area was also attested to by Shipwreck Coast Tourism and Geelong Otway Tourism.

---

227 Ibid., p. 92.
228 See Tourism North East, submission no. 38, p. 6, and Mansfield Shire Council, submission no. 45, p. 9.
229 Mildura Tourism, submission no. 62, p. 2.
230 Corangamite Shire Council, submission no. 54, p. 1.
231 Mr J Johnson, Chief Executive Officer, Sovereign Hill, Environment and Natural Resources Committee public hearing – Melbourne, 8 October 2013, transcript of evidence, p. 24.
233 Ibid., p. 25.
234 See Ms C Reid, Executive Officer, Shipwreck Coast Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 77; and Mr R Grant, executive officer, Geelong Otway Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, pp. 55-56.
In terms of private investment in accommodation, the Victoria Tourism Industry Council (VTIC) told the inquiry that a range of facilities was needed, and that, ‘We really do not have very much on the ground in some locations where you have to have accommodation’. The Chief Executive of the VTIC, Ms Smith, in discussing accommodation in relation to iconic walks stated that:

There would definitely be a need for low-impact style eco cabins or eco lodges to complement some of the iconic walks. To walk from Falls Creek to Mount Hotham you have to stay overnight. It is too hard to do that whole walk. But it could be that there is something adjacent to the park that is more suitable to that type of setting as well. But it is a matter of having a range to complement what we already have.

Other stakeholders to the inquiry frequently commented on the missing element of sustainable accommodation within, or near, national parks for walkers and other visitors, in Victoria. Pointing to best practice examples from Tasmania and overseas, the Executive Officer of Geelong Otway Tourism, Mr Grant, stated in relation to the Great Ocean Walk that:

I think the opportunities for the private sector to develop appropriate accommodation similar to what we are seeing in New Zealand and similar to what we are seeing in other parts of the world are terrific, I really do. I think, again, it is about the management of that process to ensure that the development is appropriate in scope, scale and design.

Currently on-site accommodation is provided, on private land, for walkers near the Great Ocean Walk, although this requires walkers to leave the site overnight and return to the trail the next day. The owner of Bothfeet Walking Lodge, Mr Ronan, told the inquiry that for private investors in accommodation on public land, leases would need to be of an appropriate length:

I think on the Great Ocean Walk there is a case for maybe a 25 or 30-year lease. If you are looking at low-scale, low-impact accommodation that is blended into the walk and that is very low key, you need to get a return period commercially to make that make sense. I think 99-year leases would be for something more significant.

Tourism Victoria also commented on the role of walkers’ accommodation in significant destinations, such as the Grampians, the Great Ocean Road, the High Country and Wilsons Promontory. The Group Manager (Product Marketing), Ms Chris White, of Tourism Victoria stated that:

There is [a] real opportunity, consistent with what is done in Tasmania and New Zealand and Canada, to have appropriate accommodation in those walks and divide

---

236 Ibid., p. 148.
237 Mr R Grant, Executive Officer, Geelong Otway Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 56.
238 See Bothfeet, submission no. 57.
239 Mr G Ronan, Owner, Bothfeet Walking Lodge, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 67.
them up so that, instead of people doing one or two-day walks, we let them truly do a Peaks Trail walk for 8 or 9 or 10 days. 240

The Committee also heard about the development of the Coastal Wilderness Walk proposed for East Gippsland and the need for suitable and sustainable accommodation along its length. The Chief Executive Officer of Destination Gippsland, Mr Robinson, stated that such accommodation would not be large scale, and would need to be appropriate to the market and the environment. He went on to state that:

There is the example of the Coastal Wilderness Walk that we are supporting in East Gippsland, whether it be the Overland Track or some New Zealand options where there are huts and cabins along the way, which are part of the experience. It is not just about building accommodation and visitors will come; it needs to be considered as part of the environment. We are not advocating for inappropriate or large-scale development for the sake of it; it needs to be consistent with each particular area. There are not enough services and accommodation within the national parks for the demand they are getting currently.241

Not all contributors to the inquiry were supportive of the development of sustainable accommodation within national parks. The Victorian National Parks Association in its submission stated that adequate accommodation already existed, or could be developed, outside of the national parks system. In their submission, the Victorian National Parks Association provided examples, including Halls Gap, the Alpine resorts, Lorne and Apollo Bay, of sites with a range of attractive accommodation for tourists. 242 Ms Margaret Sietsma stated in her submission that, ‘In most of the world, tourist accommodation and commercial tourism hubs are in gateway areas outside the parks themselves, and all activities in protected areas are controlled by the park management agency’.243

The evidence presented to the Committee suggests that there is an accommodation shortfall for ecotourism and heritage tourism across the state. Accommodation is a vital part of tourism infrastructure, and currently Victorian regions are missing out due to the failure of the market to provide an adequate level and diversity of accommodation options for tourists. The Committee recognises that in some areas this issue is more acute than in others, and that the state does possess a significant and largely successful series of camping grounds on public lands. Victoria also has significant accommodation in mid-range bed and breakfasts, and motel accommodation, mostly servicing the touring market.

The gaps in the state’s accommodation infrastructure appear to be principally at two ends. One is at the high-end, high-yield boutique-style eco-lodges set in remote and pristine areas. This type of accommodation also includes eco-lodges for walkers in iconic destinations, such as the Great Ocean Road, the Grampians Peaks Trail, and the Coastal Wilderness Walk, located either in, or

240 Ms C White, Group Manager, Product Marketing, Tourism Victoria, Environment and Natural Resources Committee public hearing – Melbourne, 7 November 2013, transcript of evidence, p. 94.
241 Mr T Robinson, Chief Executive officer, Destination Gippsland, Environment and Natural Resources Committee public hearing – Lakes Entrance, 5 December 2013, transcript of evidence, p. 205.
242 Victorian National Parks Association, submission no. 67, p. 9.
243 Margaret Sietsma, submission no. 39, p. 1.
adjacent to national parks. The other type of ‘missing’ accommodation relates to the larger scale market associated with key destinations such as the Twelve Apostles, Phillip Island and Ballarat, and high numbers of international tourists. This lack of accommodation is a real constraint on regional dispersal, effectively putting a brake on the regional growth of ecotourism and heritage tourism.

Best practice models for the development of accommodation in national parks will be a subject for discussion in Chapter Four. However, the Committee can foreshadow that it supports the development of sensitive, environmentally sustainable accommodation, on a small scale, in national parks where appropriate. In some instances it will be more appropriate for such accommodation development to occur adjacent to, or nearby, a national park. The Committee does not endorse the notion that national parks cannot include sustainable accommodation development, provided that the process for establishing such ventures has a high level of rigour and is consistent with world’s best practice.

While it is not, generally, the role of government to supply accommodation, it can be the role of government to facilitate private investors in overcoming obvious market failures, such as those listed above. The Committee therefore supports the investment attraction strategies of Tourism Victoria concerning accommodation, noted above.

The Regional Tourism Boards (RTBs) have a role in identifying the accommodation gaps in their regions. The RTBs can work with local industry providers in ecotourism and heritage tourism, local councils, Parks Victoria and Tourism Victoria and other stakeholders to assess regional accommodation needs.

Accordingly, the Committee recommends that:

**RECOMMENDATION 3.3**

Regional Tourism Boards (RTBs), working with local providers of heritage and ecotourism products, chambers of commerce, councils, Parks Victoria, and Tourism Victoria, the Victoria Tourism Industry Council, and other stakeholders, will identify accommodation gaps currently constraining the development and sustainable growth of ecotourism and heritage tourism in their regions.

- In their destination management plans RTBs will include the means by which such gaps could be redressed, including proposals for facilitating private investment.
3.2.2 Signage

The signage that is in place along these sites has not been maintained over the years. It is like the traditional trails where they get the sign put up and someone puts a bullet through it, and over time those things degrade or a truck runs through it.

This comment from Mr Peter Abbott, the Manager of Tourism Services at Flagstaff Hill Maritime Village in Warrnambool, is illustrative of many of the comments made by contributors to the inquiry concerning the state of tourism signage around the state. Tourism signage is a critical and direct form of tourism infrastructure, and the Committee has been made aware of the often poor state of this key element of infrastructure.

According to stakeholders, signage is very often in disrepair, out-dated or inappropriate, or simply does not exist. Tourism operator, Ms Faye Barkla, of Maryborough, commented to the inquiry on the Maryborough heritage station, saying, ‘I do not understand why it is not promoted. There is no signage for it. As you come into the town you cannot even find the station; you have to go looking for it’.

Tourist signage located on Victorian roads is shaped by guidelines produced by VicRoads and Tourism Victoria. The signage policy is designed ‘to give visitors direction or guidance to tourist attractions, services and facilities’, through a coordinated network of standard signs. One of the policy’s stated outcomes is to ensure ‘a signing system which adds value to tourism development and promotion strategies and, in particular, contributes to enhanced visitor experiences, longer stays and greater tourism activity in regional areas’.

There are currently a number of official formats for tourist road signs, including:

- Direction signs: white lettering on a green background, used to provide directions to major towns and attractions;
- Tourist attraction signs: white lettering on a brown background, used to indicate significant tourist and recreation sites such as historic buildings, national parks and scenic lookouts; and,
- Services signs: white lettering on a blue background, used to provide directions to key tourism facilities such as visitor information centres, accommodation and service stations.

Examples of tourist road signs are provided over page.

244 Mr P Abbott, Manager, Tourism Services, Flagstaff Hill Maritime Village, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 71.
245 Ms F Barkla, Tourism Operator, Maryborough, Environment and Natural Resources Committee public hearing – Ballarat, 8 October 2013, transcript of evidence, p. 31.
247 Ibid., p. 8.
Alongside text these signs often include a range of standardised symbols denoting typical attractions and services, such as a bunch of grapes for a winery, or a cup and saucer to indicate a café.

Signs featuring Tourism Victoria’s Jigsaw logo exist at ‘gateways’ to the state’s tourism regions, for example, the Great Ocean Road and the Goldfields. A small number of Jigsaw-branded signs have been placed at individual tourist attractions, such as the Phillip Island Penguin Parade.

Tourism operators apply to the local council for approval to erect official signage. Applicants must fulfil a range of criteria to be eligible for tourist signage, such as meeting a minimum standard of opening hours and having appropriately trained visitor staff. Applicants are responsible for the cost of erecting and maintaining the sign. The policy also makes provision for regional/local tourism signing committees to be involved in consulting with local stakeholders about the signage needs of local industry.

In addition to roadside tourist signage, a range of interpretive signage exists within natural and cultural heritage sites to provide information and explain elements of tourist sites to visitors. Such signage can be found inside national and state parks, along walking trails, at historic sites, and also in roadside information huts. A number of agencies and organisations are responsible for the development of interpretative signage, including Parks Victoria, local government and individual heritage operators. Each organisation typically has its own template and approach to signage; there is no standardised approach to interpretative signage throughout the state.

Many of the contributors to the inquiry spoke of the need for high quality, interpretive signage at key destinations. The Wellington Shire Council, commenting on the Alpine National Park, stated that, ‘there is a lack of quality interpretive signage within the Alpine National Park and despite being one of the highest use National Parks east of Melbourne, no central information presence is

---

250 Ibid., p. 54.
provided, in terms of an Interpretation Centre or Visitor Centre.\textsuperscript{252} Good quality signage also takes into account the values of a given site, and the stories that underpin the site, whether they be natural stories, or human ones. This point was made by the Australian branch of ICOMOS (International Council on Monuments and Sites). ICOMOS Committee Member, Ms Lisa Gervasoni, told the Committee that the Royal Botanic Gardens in Melbourne provided an example of signage that was ‘discreet, well themed and well thought out, so you actually have an experience across the site’.\textsuperscript{253}

Good, well maintained track signage is a key part of delivering a good visitor experience in the state’s parks, with some of the inquiry’s contributors noting the often poor state of this signage. The Victorian National Parks Association’s Executive Director, Mr Matt Ruchel, told the inquiry that, ‘on infrastructure I would say, though — and we certainly agree with the tourism industry on this — that people need to have a really good experience when they visit our natural areas. For too long there has been a bit of neglect on things like track signage’.\textsuperscript{254}

The rise of Asian tourism into Victoria, particularly Chinese tourism, has raised the issue of the need for multilingual signage and services at key destinations. Sovereign Hill provides an example of a site that successfully provides dedicated Chinese signage and language tours to Chinese tourists. But the Committee was also advised that multilingual signage needs to avoid being tokenistic. According to the Manager (Tourism Product and Planning) of Tourism Tasmania, Ms Gill Parssey, ‘we think tokenistic kind of efforts in terms of signs dotted around the place in Japanese or Chinese make little difference’.\textsuperscript{255}

The Director of Visitor Services for the Tasmanian Parks and Wildlife Service, Mr Stuart Lennox, told the Committee that the focus for Asian tourist signage now was to create welcome signs in that language, with a QR code associated – that way Asian visitors are able to scan the code, which will take them to the park brochure, with all the information provided on the park in their language.\textsuperscript{256} The requirement for the establishment of signage infrastructure relevant to markets with diverse language and cultural needs is recognised and supported in the Victorian 2020 Strategy.\textsuperscript{257}

The Committee has itself witnessed the often parlous condition of the state’s tourism signage. With notable exceptions, heritage tourism and ecotourism signage is frequently inadequate, dilapidated or non-existent, and thus represents an important barrier to the growth of these tourism segments, particularly in the regions. The Committee views modern interpretative

\textsuperscript{252} Wellington Shire Council, submission no. 12, p. 2.
\textsuperscript{253} Ms L Gervasoni, Victorian Committee Member, Australia International Council on Monuments and Sites, Environment and Natural Resources Committee public hearing – Melbourne, 25 November 2013, transcript of evidence, p. 159.
\textsuperscript{254} Mr M Ruchel, Executive Director, Victorian National Parks Association, Environment and Natural Resources Committee public hearing – Melbourne, 7 November 2013, transcript of evidence, p. 91.
\textsuperscript{255} Ms G Parssey, Manager, Tourism Product and Planning, Tourism Tasmania, Environment and Natural Resources Committee public hearing – Hobart, 13 February 2014, transcript of evidence, p. 238.
\textsuperscript{256} Mr J Lennox, Manager, Director Visitor Services, Tasmanian Parks and Wildlife Services, Environment and Natural Resources Committee public hearing – Hobart, 13 February 2014, transcript of evidence, p. 230.
signage, complete with associated technologies and strong narratives, as an important infrastructure asset in matching the expectations of contemporary ecotourists and heritage tourists. Good signage is interpretive, and reflects and provides an understanding of a site’s history – natural, human or both – that assists in providing the visitor with the immersive experience of a place, that is one of the hallmarks of this type of tourism. Such signage is also multicultural, and allows for the visitor, via QR codes, to access this information in his or her own language.

The Committee strongly believes that the state’s tourism signage needs to be improved. The newly-formed RTBs have a central role to play in identifying the signage gaps of each tourism region and coordinating the needs of the myriad stakeholders involved, including Parks Victoria, Tourism Victoria, Heritage Victoria, the National Trust, local government, VicRoads, ecotour operators and heritage tourism providers. The Committee is concerned that the onus is currently on individual tourism operators to apply for and fund roadside tourism signs, and believes that the RTBs have a role in overseeing the erection of signage that has broader significance to a town or region.

Accordingly, the Committee recommends that:

**RECOMMENDATION 3.4**

Regional Tourism Boards (RTBs) identify gaps in directional and interpretive signage within each tourism region, and coordinate improvements to signage. In doing so RTBs should take the advice of key agencies, such as VicRoads, Parks Victoria, Heritage Victoria and Tourism Victoria, and collaborate with local government, heritage and ecotourism operators, historical associations, and other relevant stakeholders to create a coherent themed approach to signage.

In relation to interpretative signage, the Committee is aware that different organisations and operators have particular views on how best to interpret the heritage values of the sites they manage to visitors. However, the Committee considers improvements to interpretation signage as essential to providing engaging and informative visitor experiences. Good interpretation has the power to encourage visitors to stay longer at particular sites, potentially extending their stay in regional areas and increasing the economic impact of their visits. Chapter Five discusses the issue of heritage interpretation in depth, and recommends that Tourism Victoria and Heritage Victoria develop a best practice framework to guide the improvement of heritage information within a tourism context. Further, Chapter Seven suggests extending the current Jigsaw signage network to include signposting for the state’s ‘must-see’ iconic sites, in conjunction with the development of a suite of digital interpretation such as a smartphone app.

### 3.2.3 Technological Infrastructure

One of the keys to successful modern tourism is the use and deployment of new technologies. The Committee has heard that in general there is a lack of sophistication outside Melbourne in the application of new technologies, for the interpretation and promotion of tourism experiences.
New technologies can provide the independent traveller with access to sites and the interpretation of sites in new and meaningful ways. They can be applied anywhere that digital/phone coverage is good – itself an issue in some regions. As mentioned in Chapters One and Two, the Victorian Government’s 2020 Strategy identifies digital excellence as a key area for development. It notes that there is a growing trend for people to research and book travel online, and to engage with social media to review their travel experiences.\(^{258}\)

The Regional Strategy lists a number of current projects aimed at targeted online content delivery across a range of platforms, and encourages Regional Tourism Boards to take advantage of the Australian Tourism Data Warehouse distribution platform, a joint initiative of Tourism Australia and Tourism Victoria (and other state tourism agencies).\(^{259}\)

Cultural Heritage Victoria argues that the quality of visitor experiences can be improved significantly through the use of digital technologies for storytelling and interpretation.\(^{260}\) However, as the Wellington Shire Council point out, parts of regional Victoria lack communications capacity. The Council stated that visitor expectations are now different:

> For example, in recent years the rapid growth of electronic information provision has resulted in a normal customer expectation that there is an “app” or some form of portable device downloadable information available for all visitor attractions and that face book, twitter, trip advisor or other on-line services can provide details about the quality of the experience, prior to the visitor entering the location.\(^{261}\)

Moreover, an ‘expectation in terms of signage and interpretive information being provided in languages other than English is now the norm, as is the provision of infrastructure that is fully accessible for all’, and the Council went on say that, ‘consumer comparisons are now made with overseas countries and standards expected by visitors of today far exceed what most small scale heritage and ecotourism products can offer’.\(^{262}\) And, the Council stated, there is a problem with coverage:

> In many areas of regional Victoria, it is not possible to receive 3G mobile phone reception, which hampers small towns' efforts to attract visitors, as many visitors simply will not stay or go to locations that are not seen as being "fully serviced".\(^{263}\)

Murrindindi Shire Council also called for investment in new technologies to make destinations ‘visitor ready’. There is a lack of infrastructure, the Shire stated, in up to date interpretive displays and platforms, including signage, touch screens, mobile website and apps.\(^{264}\) The Committee also heard about phone/internet coverage issues, and black spots in the Grampians and Mansfield regions. At the public hearing in Mansfield, Shire Councillor, Mr Russell Bate, advised the Committee that:

---

\(^{258}\) Ibid., p. 11.


\(^{260}\) Cultural Heritage Victoria, submission no. 65.

\(^{261}\) Wellington Shire Council, submission no. 12, p. 3.

\(^{262}\) Ibid., p. 3.

\(^{263}\) Ibid., p. 3.

\(^{264}\) Murrindindi Shire Council, submission no. 19, p. 4.
Areas like Mansfield, in fact much of the north-east of Victoria, are severely constrained essentially by the topography of the area — that is, telecommunications do not work well in very hilly and poorly serviced remote areas. Unfortunately it has two significant impacts which reflect directly on tourism. One is the expectation that has been formed, based largely on global experience by international travellers, that reasonable levels of telecommunications will exist, and they come here and find that they do not. In terms of both international and local tourism, there is an implication of public safety. I think most of you are aware that Victoria’s bushfire warning system is predicated on texting. It is not terribly useful when a great majority of your remote tourism areas literally do not receive any form of mobile communications.  

Mr Bate went on to day that the Shire was involved in a regional telecommunications advocacy group, which was working towards solutions with both Telstra and other telcos and state and federal governments. Mr Bate emphasised what he saw as two critical issues:

One is the public safety issue, which is increasingly something that tourists are aware of and therefore sometimes they are reluctant to go into remote areas; and the other is the impost on local businesses, particularly those that are in adventure tourism, of physically being out of contact and unable to run their businesses in remote areas.

Mr Bate stated that the local shire was willing to share its part, and contribute towards rectifying the situation, but he also called on the state government to work with the federal government, in offering some facilities or assistance to the telcos, and that this would see ‘a more rapid rollout of telecommunications and the coverage of some black spots’. The Committee also heard that the Walhalla township, which has significant potential to expand its heritage tourism, has no effective mobile coverage or internet, despite the fact that it has fibre running down the main street. At the Halls Gap public hearing the Committee was advised that a lack of telecommunications infrastructure was a barrier to tourism in parts of the Northern Grampians, particularly in and around the Grampians themselves.

However, the Committee did learn about a number of projects that have, or will, deliver tourism products using new technologies. Phillip Island Nature Parks advised the Committee that a major strategic priority was to use ‘new technologies to provide interpretation for Penguin Parade visitors, including apps for social media devices and free Wi-Fi access at all our visitor centres’. The use of this technology would assist in providing a better experience for all visitors, particularly non-English speaking visitors, and the Nature Parks were also investigating interactive Skype education sessions.

---

265 Mr R Bate, Councillor, Mansfield Shire Council, Environment and Natural Resources Committee public hearing – Mansfield, 21 March 2014, transcript of evidence, p. 354.
266 Ibid., p. 355.
267 Ibid., p. 355.
270 Phillip Island Nature Parks, submission no. 68, p. 7.
The National Trust launched its third iPhone app in 2012 titled, *Lost! Melbourne’s Lost 100*, which allows the visitor to gain a 3D understanding of lost city icons, superimposing images of buildings that previously existed over those currently there. Heritage Victoria has recently released a mobile app that allows users to find information about listed heritage sites throughout Victoria. The app suggests walking tours and also encourages users to contribute their own information and experiences to share with other tourists. Geelong Otway Tourism is also exploring the use of digital technology on the Great Ocean Road, with a project to examine the development of a series of Wi-Fi hot spots along the Great Ocean Road, so that the visitor will be able to stop at places and download detailed information about that site.

The Committee will discuss best practice in new technologies for heritage tourism and ecotourism further in Chapters Five and Seven. The Committee welcomes the announcement in the Victorian Budget 2014-15, that $40 million is to be allocated to deliver free Wi-Fi on V/Line trains, and for the removal of mobile phone black spots. The evidence presented to the inquiry suggests there is a significant infrastructure shortfall in regional telecommunications, and that this shortfall is, in some instances, compromising the development of ecotourism and heritage tourism in areas of the regions. The impact of this shortfall is felt on the tourism industry, and also has serious implications for emergency services. The Committee urges the Victorian Government to continue to make telecommunications infrastructure a priority, and to work with the federal government, local shires and telcos to deliver better outcomes.

Accordingly, the Committee recommends that:

**RECOMMENDATION 3.5**

The Victorian Government work with the federal government, local governments, local industry representatives and telecommunications providers to improve the standard of telecommunications in Victoria’s regions, with particular attention to eliminating the state’s identified mobile black spots.

### 3.3 Workforce skills and development

The 2020 Strategy identifies workforce skills and development as a key priority for the industry. Tourism Victoria, through its *Victoria’s Workforce Development Plan* has identified labour and skills development as a challenge to the tourism industry; a challenge not only to increase the number employed in tourism, but to attract people to occupations where there have been

---

271 National Trust of Australia (Victoria), submission no. 70, p. 9.
273 Mr R Grant, Executive Officer, Geelong Otway Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, pp. 54-55.
persistent shortages, which are more pronounced in regional areas. The Regional Strategy identifies a number of actions to be undertaken to enhance workforce capacity in regional areas. A priority is to improve skills and service standards through the Tourism Excellence Program, workshop modules of which are designed to be implemented by Regional Tourism Boards (RTBs). A key feature of state strategies in this area is an understanding of the need to have workforce skills and capacities that match the increasingly diverse tourism market, particularly skills relevant to the China market.

In the evidence presented to the Committee in this inquiry it is clear that the ecotourism and heritage tourism sectors currently experience personnel, skills and training shortages across the state, with regional Victoria the most significantly affected. The Committee heard that there is a need for appropriately skilled guides to support visitor experiences at tourist sites. Ecotourism Australia notes that properly trained guides are central to producing high quality tourism experiences, stating that ‘current research is clear that the market is seeking authentic and memorable experiences where there is a personal connection between the visitor and the guide, operator or ranger’. Sovereign Hill has argued that this is of particular concern in regional areas: ‘The things that hold us back in regional Victoria are a lack of qualified and skilled guides, which is true for heritage tourism in general’.

For ecotour operators, such as Bothfeet Walking Lodge, the issue of staff attraction, retention and development is central to the success of the business. As business owner, Mr Ronan, stated at a public hearing:

> It is about developing the skills, the workforce and the community plans to support the growth. There is no point building this capacity and demand for experiences if we do not have the people who can deliver it — and the supporting social infrastructure. Like the example I mentioned with Apollo Bay, if you have no room to house employees, then you cannot service the demand.

Mr Ronan also suggests that improving skills in the industry is important in assisting with staff retention and creating careers within the sector:

> As an employer we see a lot of transient people going through the industry. It is not seen as a long-term industry, it is something you do at a certain time in your life and then you move on to something else. How do we make this a career for people? How do we build education systems to give the skill sets we need for the

---

277 Ecotourism Australia, submission no. 15, p. 2.
278 Mr Jeremy Johnson, Chief Executive Officer, Sovereign Hill, Environment and Natural Resources Committee public hearing – Ballarat, 8 October 2013, transcript of evidence, p. 24.
279 Mr G Ronan, Owner, Bothfeet Walking Lodge, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 64.
industry and ensure that we have the housing and social infrastructure to meet those needs.\textsuperscript{280}

The Committee heard that the seasonality of the sector also impacted on staff retention and development. Business and staff training is also an issue for the regions, where some accreditation and training courses may be hard to access. The Gippsland Lakes Ministerial Advisory Committee advised the Committee that when training programs were offered within regions there was usually a good take up rate – but there was a difficulty in persuading operators to take time off from their businesses to undergo training and development in Melbourne.\textsuperscript{281}

Enhancing the quality of the visitor experience, particularly in relation to the Chinese market is a key goal of the industry. To this end Tourism Victoria has partnered with Tourism Australia and the Australian Tourism Export Council and other partners to deliver a training and development program known as Welcoming Chinese Visitors, which was mentioned in the previous chapter of this report. At a Melbourne public hearing Tourism Victoria advised the Committee about the roll out of this program. Acting Chief Executive, Mr Dalton, stated that:

\begin{quote}
In partnership with Tourism Australia, there is a China-ready program, where firms undertake basic cultural and language training to make them more welcoming and culturally aware. I know it is part of marketing, but we feature more and more products now on the Chinese app that we run in China on a Chinese website, so that people from China can readily see particular products. Part of that China-ready program is again increasing cultural awareness in areas such as how to serve food, and places like Sovereign Hill now have dedicated Chinese signage and people taking tours around there.\textsuperscript{282}
\end{quote}

The importance of cultural skills training and development was emphasised to the Committee by the Manager of Tourism Product and Planning at Tourism Tasmania. Ms Parssey stressed the need for the hospitality industry, which supports ecotourism and heritage tourism, to be appropriately trained:

\begin{quote}
If you do not have the hospitality industry in tandem with any work you do on China Ready it is not going to be successful because it is intrinsic to the satisfaction, meeting the needs of the Chinese market…. Staff education, skills, training et cetera is critical. It is not good enough to train the businesses, it has to be cultural training at a much broader level with staff and the community.\textsuperscript{283}
\end{quote}

For the heritage tourism sector there are particular issues in staff training. In their submission the Sovereign Hill Museum Association stated that:

\begin{itemize}
\item \textsuperscript{280} Ibid., p. 62.
\item \textsuperscript{281} Mr M Richardson, Executive Officer, Gippsland Lakes Ministerial Advisory Committee, Environment and Natural Resources Committee public hearing – Lakes Entrance, 5 December 2013, transcript of evidence, p. 194.
\item \textsuperscript{283} Ms G Parssey, Manager, Tourism Product and Planning, Tourism Tasmania, Environment and Natural Resources Committee public hearing – Hobart, 13 February 2014, transcript of evidence, p. 238.
\end{itemize}
The lack of qualified and skilled guides is a major issue for heritage tourism. Interpreting the built heritage is a particular skill that requires training and ongoing educational support for the workforce and volunteers in the sector. 284

At the Ballarat public hearing, the CEO of Sovereign Hill told the inquiry that all of Sovereign Hill staff now undertake a program of training on cultural awareness, in partnership with both the University of Ballarat and Monash University. 285 There is a clear need to up-skill staff and volunteers within the heritage sector, both in terms of historical expertise and general hospitality skills. Ms Marie Kau from the Talbot Arts and Historical Museum spoke about the needs of volunteer heritage societies:

Overwhelmingly community museums are staffed by volunteers who have minimal relevant training. To realise the potential for developing heritage tourism, including the study of family and local history, support needs to be provided for these volunteers who, it has been estimated, return at least sevenfold in their output in relation to input to their activities. If for only this reason, providing support to volunteers is well worth the investment. 286

Ms Kau advised the Committee that a previous community museums strategy, which concluded in 2012, had provided a successful and locally delivered training program for heritage tourism volunteers. The program was especially popular because it was done locally, so volunteers were not required to travel to Melbourne. 287 However, a significant problem across the heritage tourism sector is its reliance on a volunteer workforce that is increasingly ageing, with fewer younger volunteers emerging. The heritage railways of Victoria are largely staffed by volunteers, but as the Registrar of Tourist and Heritage Railways, Public Transport Victoria, advised the Committee:

I represent the lower edge of the volunteers who get involved with tourists and heritage and I turn 60 in a month’s time. The biggest problem we have is that we are not encouraging or recruiting, training and retaining people who are in their 30s and 40s to take this forward. 288

The Committee believes that there are skills shortages that are limiting the potential growth of the ecotourism and heritage tourism segments of the tourism industry. The issue of accreditation for businesses and guides for ecotourism and heritage tourism will be discussed in Chapters Four and Five. Suffice to say at this juncture, that there is clearly a role for individual operators to fund the development and training of their staff, in order to enhance their businesses and expand the sector.

---

284 Sovereign Hill Museum Association, submission no. 18, p. 4.
285 Mr J Johnson, Chief Executive Officer, Sovereign Hill, Environment and Natural Resources Committee public hearing – Ballarat, 8 October 2013, transcript of evidence, p. 25.
286 Ms M Kau, Community Representative, Environment and Natural Resources Committee public hearing – Ballarat, 8 October 2013, transcript of evidence, p. 33.
287 Ibid., p. 33.
The Committee also appreciates that skills training for the tourism sector will often need to embrace the allied hospitality industry as well, particularly in the light of the growing Asian market. The ecotourism and heritage tourism industry face significant challenges in attracting, developing and maintaining a talented workforce, with the seasonality of the industry a key current constraint.

The Committee views Regional Tourism Boards are being best placed to identify the skills and training shortages in their regions. Industry leader, the Victoria Tourism Industry Council, also has a role in training gaps identification. The Committee is also of the view that, wherever feasible, programs and training courses, such as the Tourism Excellence Program, and the China-readiness programs, conducted for the sector by Tourism Victoria, should be made available in major centres in the regions. Accordingly, the Committee recommends that:

**RECOMMENDATION 3.6**

Regional Tourism Boards are best placed to identify the skills and training shortages in the regions, and should map their regions accordingly, in collaboration with local ecotourism and heritage tourism operators, the Victoria Tourism Industry Council, local councils and Tourism Victoria.

- Tourism Victoria should make training programs, such as the Tourism Excellence Program, and China-ready programs, accessible to regional operators, by delivering programs in regional centres, and online.

It should be further noted that the Committee is particularly concerned that volunteers in the heritage tourism sector receive adequate training to undertake their roles. The Committee appreciates that this group of Victorians provide an often extraordinary service to their local communities and the state. The Committee believes there needs to more collaboration across the sector to address the training needs of volunteers. The issue of training and skills acquisition for volunteers in the heritage tourism sector will be further pursued in Chapter Five.
Chapter Four

Best practice in ecotourism

This chapter examines best practices in ecotourism, drawing on evidence and examples from within Australia and overseas. It begins with an overview of Victoria’s licensing scheme for tourism operators, and then examines ecotourism accreditation schemes. The issue of commercial development in national parks is covered in detail, followed by a section on the funding of sustainable ecotourism development. The chapter concludes by examining the need for a renewal of policy in this area. As such the chapter primarily addresses term of reference two, but also relates to terms of reference three and four, namely:

- Examining best practice in ecotourism and heritage tourism;
- Examining the potential for the development of ecotourism and heritage tourism in Victoria; and,
- Determining the environmental and heritage issues associated with large scale tourism.

The chapter makes a number of recommendations designed to enhance the ecotourism sector in Victoria. The success of ecotourism in Victoria will rely heavily on the partnership between government and the private sector.

4.1 Victoria’s licensing scheme

Parks Victoria manages Victoria’s national parks, state parks and other lands and waterways of significance; an area that totals almost one fifth of the whole state (i.e. approximately 3.5 million hectares). According to Parks Victoria, Victoria’s parks attract 86 million visitations a year, and contribute $960 million annually to the Victorian economy.

Commercial activities in Victoria’s parks are regulated by Parks Victoria through a licensing scheme. As at 30 June 2013, there were 350 licensed tour operators (LTOs) in Victoria’s parks system, including lands managed by Parks Victoria and the Department of Environment and Primary Industries (DEPI). As Parks Victoria state in their submission, a Tour Operator Licence is required by people or businesses who conduct organised tours or recreational activities for profit.

---

289 P Darby, R Macreadie, C Ross, and B Lesman, National Parks Amendment (Leasing Powers and Other Matters) Bill 2013, Research Brief, No. 4, Parliamentary Library Research Service, Melbourne, 2013, p. 5.
290 See Parks Victoria, submission no. 71, p. 1.
291 ibid., pp. 3-6.
on public land in Victoria.²⁹² The top ten activities provided by LTOs are: bushwalking; coach and bus tours; bird watching; coastal walking; canoeing, kayaking and mountain biking; motorised boat tours; four wheel drive tours; rock-climbing; horse riding; and, abseiling.²⁹³

Of the 350 LTOs, 77 per cent hold a one year licence, 20 per cent hold a three year licence and 3 per cent hold a ten year licence, and these tour operators have facilitated over 84,000 visits to public lands in the year to June 2013.²⁹⁴ The most popular activity, bushwalking, is offered by 151 operators. The West Coast District parks, located along the Great Ocean Road, are the most visited areas by LTOs, attracting over 25,000 visitors.²⁹⁵

Parks Victoria states that tour operator licences are built on general conditions, activity conditions, location conditions, and special conditions, and that, ‘Parks Victoria provides longer tenure of licence for operators that hold recognised industry certification that encourages improved environmental, cultural and business management’.²⁹⁶ In order to be eligible for a longer-term licence, Parks Victoria requires, and recognises, a number of types of accreditation. Licence terms and conditions require the licensee to possess accreditation consistent with the nature of the product being offered, while maintaining such accreditation is a condition of the licence. For up to a three year licence term, the LTO must hold one of the following:

- Nature Tourism – EcoCertification IV;
- Australian Tourism Accreditation Program (formerly, Better Business Tourism Accreditation Program); and,
- Respecting Our Culture program.

For up to a 10 year maximum licence term, the LTO must hold one of the following:

- Advanced Ecotourism – EcoCertification IV;
- Ecotourism – EcoCertification IV; and
- EarthCheck Benchmarking and Certification (formerly GreenGlobe Company Standard).²⁹⁷

In addition to the licensing system for LTOs, the Committee is aware that a range of other commercial leases are granted by Crown land managers for activities on public lands, including in national parks and state reserves.²⁹⁸ Commercial leases often relate to restaurants/kiosks, caravan parks, and marinas. At a public hearing in Melbourne, Mr Peter Beaumont, Executive Director, Land Management Policy, DEPI, stated that ‘there are ‘1200 leases, licences and permits’

²⁹³ Parks Victoria, submission no. 71, pp. 3-4.
²⁹⁴ Ibid., p. 4.
²⁹⁵ Ibid., p. 4.
²⁹⁶ Ibid., p. 4.
²⁹⁷ Ibid., p. 4.
across Victoria’s parks and reserves. In its submission to the inquiry, DEPI noted the importance of leasing public lands for commercial activities that support ecotourism and heritage tourism. It argues that facilities such as caravan parks and restaurants enhance tourism experiences and ‘enable the community and visitors to use and enjoy public land’. Commercial leases may be granted to varying time frames and are managed by a range of acts, depending on the type of public land involved, including the National Parks Act 1975 (Vic) and the Crown Land (Reserves) Act 1978 (Vic).

4.1.1. Views of stakeholders

Stakeholders expressed a variety of views concerning the licensing system for commercial tour operators offering products on public lands in Victoria. For Geelong Otway Tourism, the processes and licensing systems for tourism operators on public land need to be streamlined, whilst at the same time, ‘ensuring necessary accreditations and environmental commitments are met’. This view was supported by the Executive Officer for Shipwreck Coast Tourism, Ms Carole Reid, who stated at the Port Campbell hearing that, ‘I think the current licensing agreement for tour activity operators and activities on public land requires a more streamlined administration system. It is very convoluted and difficult’. The Victoria Tourism Industry Council (VTIC) stated in its submission that the ‘current licensing system for tour operators and activity providers on public land promotes sustainable business practices and environmentally responsible conduct, however [it] could benefit from a streamlined administration system’. At a Melbourne public hearing, the Chief Executive of VTIC, Ms Dianne Smith, stated that:

There is confusion and inefficiency with the licensing system. We believe there should be one agency delegated to do the tour operator permits, and if they are resourced appropriately, they can then coordinate on behalf of the rest of the land managers. That is our position, and we put that forward to the government recently.

At the Mansfield public hearing the Chief Executive Officer of Tourism North East, Ms Sara Quon, told the inquiry that the barriers to growth in the industry included, ‘the licensing and insurance costs associated with our licensed tour operators running their businesses’, which can at times, ‘be prohibitive to the sustainability of their business’. The issue of licence costs and fees was

---

300 Department of Environment and Primary Industries, submission no. 80, p. 8.
301 Geelong Otway Tourism Inc., submission no. 77, p. 2.
302 Ms C Reid, Executive Officer, Shipwreck Coast Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 79.
303 Victoria Tourism Industry Council, submission no. 64, p. 3.
305 Ms S Quon, Chief Executive Officer, Tourism North East, Environment and Natural Resources Committee public hearing – Mansfield, 21 March 2014, transcript of evidence, p. 360.
also referred to by the owner and operator of Sea-Safari on Lakes Entrance, Mr Peter Johnstone, who stated that:

As a tour operator I am licensed to work on Parks Victoria land and Crown land in general. I pay a fee for that, which as a businessman I am never happy about, but that is small business. I sometimes feel that the fee, which is part of the licence, is not fairly distributed, to put it bluntly, from my perspective. In other words, if I take somebody to Rigby Island to walk for an hour, I pay the government $2.40. There are no facilities on Rigby Island — there are no toilets — but I still owe the government $2.40 every time I take someone for a 10-minute walk. As you can imagine that is an issue in itself.  

The Prospectors and Miners Association of Victoria (PMAV) believes that their members are being unfairly excluded from national and state parks and reserves, or given only highly limited access. The PMAV regards its heritage activities permitted under a Miners Right as very low impact, and argues for broader access to Victoria’s goldfields. In its submission to the inquiry, the PMAV argues that this form of heritage tourism has huge potential in the state’s national park system, and should be encouraged by the Victorian Government, not prevented. The PMAV states that prospectors are ‘ready, willing and able to spend their time and money as tourists in areas where they are currently not allowed’, and that most tourists are seeking ‘genuine, authentic, unique and memorable cultural experiences where there is a personal connection between the visitor and the activity’. 

A few operators have suggested that Parks Victoria issues too many licences, and that licences are too cheap, which has led to a high turnover in the industry, rather than the growth of sustainable, environmentally responsible businesses. The most trenchant criticism of the licensing system in this respect came from the owner of Bothfeet Walking Lodge, Mr Gavin Ronan, who stated at the Port Campbell hearing that:

The licensing system for being on Crown land and in national parks is essentially worthless, and what I mean by that is that a lot of people do not get licences, or that there are very few barriers to getting them. The cost of having a licence is very low, and whilst that is great for someone starting up like we did, I do not think it leads to the best outcomes in terms of the experience for the consumer, or for the economy or the social benefit of the regions these places are in. Sustainability is not a focus for most of the operators.

Mr Ronan went on to discuss the issue of accreditation in depth and made some valuable suggestions, which are referred to in the following discussion. However, it is important to note that neither Parks Victoria nor DEPI, concurred with the thrust of this criticism. At a Melbourne
public hearing the Manager of Tourism at Parks Victoria, Ms Alyssa Brandenburg, stated that in relation to the current licensing framework:

"I think the framework is solid. I think some definitions could use some further clarification. We have had the new reforms in the market, so to say, for three years and there have been some consequences of those that were probably unintended, from the regulatory impact statement. We are working with the department on some clarifying of definitions but also looking at streamlining approaches, cutting red tape and also the fee structures and how they might impact. We are definitely working on that a lot."

The Executive Director of Land Management Policy at DEPI, Mr Peter Beaumont, also expressed confidence in the licensing system, and its current cost structure, at a Melbourne public hearing, stating that:

"I think there is always scope to look at whether we are getting our best return. From a policy point of view we would not see the need to make changes at the moment, but there is always a need to make sure that we have sufficient revenue coming in to help maintain the parks estate and contribute to where we might add additional assets or services. At the moment the government has a regulatory impact statement on increased prices for camping fees. That is probably one example where we are looking at how we can cost recover for services in the parks. I would not say that we need to look at licences or how we run those commercial operations at the moment, but in the future there is always scope for that."

The Committee is concerned that for some industry operators the current licensing system is not adequately straightforward. The Committee supports the actions being undertaken by Parks Victoria, in concert with DEPI, to address current shortcomings including clarifying definitions, cutting red tape and reviewing fee structures. The Committee is of the view that the current structure of the licensing scheme for tour operators is not inherently flawed, and should be maintained. However, the Committee does consider that the issue of accrediting tour operators in national parks does need to be addressed, particularly in relation to the development of a viable ecotourism industry in the state, based on the sustainable use of public lands. This matter will be covered in the following section.

### 4.2 Ecotourism accreditation schemes

There are a multitude of accreditation schemes for tourism operators and businesses in Australia. One of the most recognisable brands is T-QUAL. The T-QUAL accreditation program is the Commonwealth Government’s quality framework for the tourism industry. The responsibility of the Tourism Quality Council of Australia (TQCA), T-QUAL assesses and supports quality assurance

---

311 Ms A Brandenburg, Manager of Tourism, Parks Victoria, Environment and Natural Resources Committee public hearing – Melbourne, 7 November 2013, transcript of evidence, p. 101.

schemes and endorses their members with its national symbol of quality, the T-QUAL Tick. As such, T-QUAL does not directly assess individual businesses, but rather endorses those schemes which have been independently assessed to ensure they apply standards which reach TQCA’s national quality benchmark. The members of such endorsed schemes can thus use the T-QUAL Tick in their marketing.

One of the schemes endorsed by T-QUAL is Ecotourism Australia’s eco-certification. Ecotourism Australia’s certification programs run in four principal areas: Eco-certification for ecotourism products; Eco-guide certification for individual high quality guides; Respecting Our Culture certification for operators incorporating Indigenous cultural experiences; and Climate Action certification for tour operators who wish to highlight their efforts in managing their carbon impacts. Eco-certification is divided into three graded levels of certification; Nature tourism, Ecotourism, and Advanced Ecotourism. ‘Nature Tourism’ provides certification for operators/businesses that conduct tourism in natural areas leaving minimal impact on the environment. ‘Ecotourism’ gives certification to operators/businesses conducting tourism in natural areas focusing on optimal resources use, commitment to nature conservation and helping local communities, while ‘Advanced Ecotourism’ covers tourism with strong interpretation values, commitment to nature conservation and helping local communities.

Ecotourism Australia is a not-for-profit organisation established in 1991 and has over 450 certified operators across Australia delivering over 1,500 ecotourism products. According to Ecotourism Australia, in 2013/14 the combined annual turnover of all Ecotourism Australia certified tour operators exceeded $1 billion. There are currently 47 eco-certified tourism operators in Victoria’s terrestrial and marine environments. Applications for accreditation are sent by Ecotourism Australia to an independent assessor, who provides Ecotourism Australia with an assessment containing the level of certification achieved. Application and annual fees are charged and on-site audits are conducted every three years.

Examples of Victorian organisations, businesses and operators which are eco-accredited include: Parks Victoria Wilderness Retreats, in Gippsland, which have advanced ecotourism accreditation; Aquila Eco Lodges in the Southern Grampians; the walking tour company Bothfeet, which provides hutted accommodation and guided walking experiences along the Great Ocean Walk; the family owned business Sea All Dolphin Swims, operating out of Queenscliff; the High Country tour company High Country Horses; and, Phillip Island Nature Parks — best known for the

---

314 Ecotourism Australia, submission no. 15, p. 1.
316 Ecotourism Australia, submission no. 15, p. 1.
317 See Ecotourism Australia, ‘Eco Certification’, Ecotourism Australia, accessed 22 May 2014, http://www.ecotourism.org.au/our-certification-programs/eco-certification. For EcoGuide accreditation Ecotourism Australia requires applicants to possess either 12 months guiding experience or a Certificate III or IV in tourism guiding, plus three months guiding experience. Courses that lead to Certificates III and IV in tourism guiding are offered in some Victorian TAFE institutes, such as the Gordon Institute, whose Certificate IV in Guiding has an emphasis on ecotourism and sustainability. See The Gordon Institute of Tafe, ‘Certificate IV in Guiding’, the Gordon, accessed 27 May 2014, http://www.thegordon.edu.au/Courses/Pages/Course-Preview.aspx?uid=3b38e0b3-ec4b-4a64-ae3f-4c6c6845b3f.
Penguin Parade — which is one of Victoria’s most visited attractions. Ecotourism Australia has a long established partnership with Parks Victoria, in delivering eco-certification and other services to tour operators working in national parks.

As was noted above, 23 per cent of the 350 LTOs have licences based on having completed, and maintained, an approved accreditation course, program or qualification. While not all of this group have ecotourism accreditation, a significant proportion do, at one level or another. Parks Victoria does provide incentives to LTOs to become eco-accredited and, as mentioned above, offers an extension to their licence period if they participate in a recognised program (such as those provided by Ecotourism Australia).

As the Parks Victoria submission notes, in 2010 Parks Victoria and Ecotourism Australia launched the Ecotourism Subsidy Program 2010-12, which was a tourism initiative aimed to increase business and operator professionalism for Victorian licensed tour operators. Under this program Parks Victoria subsidised 49 operators to reach eco-certified status or higher. Tourism Victoria was involved with Ecotourism Australia in the development of the national ecotourism accreditation program, which became known as the Ecotourism Certification Program, but is no longer actively involved. Similarly, Tourism Victoria previously funded Parks Victoria for the provision of subsidies for operators to obtain ecotourism accreditation, but no longer does so.

4.2.1 Views of stakeholders

Several themes emerged in the stakeholder evidence presented to the inquiry concerning eco-accreditation. Overall, there was significant and widespread support from key agencies, ecotourism providers, industry representatives, and community groups for the accreditation of LTOs and businesses, who were engaged in delivering nature-based and ecotourism products and operating on public lands. However, the sector also expressed some concerns regarding accreditation to the Committee, and offered their views on how the process could be improved.

A key argument presented was that the uptake rate of accreditation amongst nature-based and ecotour providers was far too low, and needed to be improved. Some operators stated that they were deterred from undertaking accreditation training due to the amount of resources, such as cost and time away for their business, which they need to devote to securing it. In addition, it is not clear to some operators that gaining accreditation currently gives them a competitive advantage in the marketplace. Some operators expressed the view that there was limited benefit to gaining accreditation due to the fact that few tourists understand what the various accreditation schemes stood for, or signified. There were also calls from stakeholders for the

---

318 In 2011-12, 865,617 people visited the eco-accredited sites at the Penguin Parade, Churchill Island Heritage Farm and the Koala Conservation Centre, 55 per cent from overseas, see Phillip Island Nature Parks, submission no. 68, p. 1. Ecotourism Australia’s 2012 publication, The Green Travel Guide Australia 2012/13, Bowen Hills, Queensland, lists 46 eco-accredited organisations (including one Respecting Our Culture accredited business) operating in Victoria.


320 Parks Victoria, submission no. 71, p. 5.

321 Tourism Victoria, submission no. 26, p. 8.
process of accreditation to be simplified to make them easier to understand for both operators and tourists.

The industry body VTIC stated in its submission that accreditation programs, such as those provided by Ecotourism Australia, were optional for tourism operators and that a higher level of uptake was desirable. Governments, state and federal, should cooperate and increase their promotion of accreditation in the industry. The RTB, Destination Gippsland, supported this sentiment, and also further recommended that ‘funding and support be provided to VTIC to implement a campaign to encourage and facilitate accreditation for any person delivering an ecotourism or heritage tourism activity’. At the public hearing in Lakes Entrance, Destination Gippsland explained that many operators choose not to undertake accreditation as it appears to have limited benefits for their business. Mr Terry Robinson, Chief Executive Officer of Destination Gippsland stated that:

The ecotourism side has a number of elements, logos and accreditation, but again it has no resonance for the consumer, and I think in most cases people in the industry have seen accreditation as a sort of bureaucratic hurdle to get to where they want to go to rather than something that actually lifts standards and separates their sector from others. Accreditation processes do not necessarily focus on quality. They are more around accrediting the business rather than the experience, if you know what I mean. If they are putting the paperwork through and ticking the right boxes, they get accredited, but how does that separate someone with 20 years experience who knows the product from someone who has just followed the bureaucratic steps?

The Committee was told at the Ballarat public hearing by the Manager of Economic Development and Tourism at the Mount Alexander Shire Council, Mr David Leatham, that there ‘is a lack of accreditation for ecotourism in the shire and probably a lack of knowledge in the industry about which programs have what accreditation’. At Port Campbell, the Committee was advised by Mr Roger Grant, Executive Officer at Geelong Otway Tourism that:

I think also we need to have a look at the development, implementation, training and accreditation of tour operators and private guides. Again looking on a national basis, there are some wonderful opportunities now that are being delivered out of Queensland — the Savannah guides. In fact I am the chairman of the Great Ocean Road National Landscape. At our recent forum in the Blue Mountains we discussed the whole issue of national accreditation and the enhancement of guides. That is worthy of examination and support.

---

322 Victoria Tourism Industry Council, submission no. 64, p. 3.
323 Destination Gippsland Ltd., submission no. 55, p. 2.
324 Mr T Robinson, Chief Executive Officer, Destination Gippsland, Environment and Natural Resources Committee public hearing – Lakes Entrance, 5 December 2013, transcript of evidence, p. 203.
326 Mr R Grant, Executive Officer, Geelong Otway Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 54.
Mr Martin Richardson, Executive Officer of the Gippsland Lakes Ministerial Advisory Committee, argued for a simplified accreditation process, for base level entry:

I would be inclined to suggest that you do need a base level of accreditation, otherwise there is a risk you will have people not only perhaps spoiling the brand but also giving out the wrong information. Having heard Skipper Pete last night, I think we would have to have a look at simplifying the process. You should not have to do 12 months of study, a TAFE certificate and this, that and the other thing, or whatever it is. I think we need to look at a baseline of accreditation that is fairly simple for people to obtain and really just comes down to a basic level of understanding of the ecological issues they are talking about and an understanding of how they are supposed to give that information in a professional way. I do not imagine you would need to go to great lengths to get the accreditation, but I think we would need to look at simplifying that process. 327

In their submission Business and Tourism East Gippsland (BTEG) argued that, currently, anyone can say they are a quality guide without any formal process or accreditation, and the industry needs a ‘well-supported package of training to anyone wishing to act as a guide in the Eco-Tourism or Heritage Tourism industries’. 328 BTEG suggested that the training packages could start at a basic two day Certificate 1 level, through to a 12 month Certificate 4 level option.

Tour operator on the Gippsland Lakes, Mr Johnstone, supported training packages along the lines suggested by BTEG and recommended that Tourism Victoria should implement an accredited training package for any person delivering an ecotourism or heritage tourism activity. 329 Mr Johnstone also expressed his concern at not being able to secure appropriate longer term permits for his business despite his being Ecotourism Australia eco-guide accredited. He stated that because he does not also have ecotourism accreditation for his business, ‘all they will give me is 12 months, so every 12 months I have to go through the whole rigmarole of pages and pages of permits, writing, signatures, insurance documents, all those things, which I have to resubmit, and it takes about two months’. 330

Other stakeholders were more confident that eco-accreditation was a real advantage to themselves or operators in their region. The Chief Executive Officer at Grampians Tourism, Mr Will Flamsteed, stated that:

I see eco-accreditation as a really important separator in the marketplace. I see it as a marketing tool. Let us be honest, it is a marketing tool, but what it does is bring a level of tourism excellence or business sustainability in excellence that will allow them to move forward. 331

327 Mr M Richardson, Executive Officer, Gippsland Lakes Ministerial Advisory Committee, Environment and Natural Resources Committee public hearing – Lakes Entrance, 5 December 2013, transcript of evidence, p. 192.
328 Business and Tourism East Gippsland Inc., submission no. 13, p. 2.
329 Peter Johnstone, submission no. 17, p. 3.
For the Phillip Island Nature Parks, eco-accreditation provides a basis for their business model, particularly in relation to the newer, more immersive ecotours on offer. As Environment Manager, Dr Rosalind Jessop stated:

Eco is a very valuable tool for us. From our point of view the ecotours are based on being in the wild with wild animals. The accreditation model that we are party to, that is what they base it on. The Penguin Parade itself would never be in the highest class of the eco classification because it has got so much infrastructure, whereas the tour where you are going and looking with the night-vision goggles, that is a very high class one, because it is very immersive.  

From the perspective of Ecotourism Australia, gaining awareness of accreditation in the marketplace is a real challenge. Chief Executive, Mr Rod Hillman, told the Committee that T-QUAL represented the national overarching program for accreditation, and that the Commonwealth Government had spent about $4.5 million promoting it. Mr Hillman said that ‘trying to promote certification directly to customers has proven extraordinarily challenging for anyone’. He went on to say that Ecotourism Australia works with its partners ‘where they create rewards and benefits for certified operators, and then they provide exclusive access in the different areas and PR benefits and things like that which get more people into the certification, and then the customers see the logo attached to the operators when they are doing it, and then that starts a conservation’.  

Mr Hillman provided the example of certified marine operators in the Great Barrier Reef. Eighty per cent of all passengers who go on tours at the Great Barrier Reef are carried by ecotour operators – a situation that exists because of the direct support the Great Barrier Reef Marine Park Authority gives to certified operators. He said that:

If you are certified operator operating in the marine areas of the Great Barrier Reef, you can get up to a 15-year licence, and if you are buying large boats and these types of things, to go to a bank and say, ‘I have a licence for 15 years’ compared to saying, ‘I have a licence for one year’ — I know who the bank will give the loan to.  

In their submission to the inquiry, Ecotourism Australia stated that it was incumbent upon operators within national parks to demonstrate best practice. It states that:

Operating within a National Park is an enormous privilege and requires high levels of trust being established between all stakeholders. At a minimum operators
should be required to demonstrate their commitment to best practice through adherence and commitment to certification programs.\textsuperscript{336}

At the same time, the submission underlined the importance of providing rewards for operators who choose eco-certification, and argued that they should be increased. These rewards include, ‘cost effective longer permits and licenses, exclusive access to sensitive areas and preference in public relations and media opportunities for eco-certified operators [which] are effectively used in other States’.\textsuperscript{337} The submission went on to state that:

Eco-certification is totally industry funded and provides tangible benefits to governments by reducing compliance costs, improving visitor experience and providing increased environmental outcomes. Eco-certification is expensive to operate, especially the commitment to undertake on-site audits every three years, and ongoing Victorian Government financial support would greatly assist Ecotourism Australia to continue delivering the service.\textsuperscript{338}

This type of ‘rewards based’ approach to eco-accreditation was supported by owner operator, Mr Gavin Ronan, of Bothfeet Walking Lodge. Mr Ronan argued at the Port Campbell public hearing that the licensing system for operators in national parks should be competitive, where accredited operators are given advantages in terms of access, and licence terms. The latter is particularly important in relation to attracting investment, which he said must be given an incentive.\textsuperscript{339} In arguing for increased participation in accreditation schemes Mr Ronan outlined some suggested improvements to the current system. In his submission he details the number of currently competing certification organisations and programs, such as Ecotourism Australia, Green Globe, Earth Check, Green Table, Leave No Trace, ‘and dozens more internationally’.\textsuperscript{340} Mr Ronan would like the system to be consolidated into a single-based national system, offering three clear graded levels (basic, intermediate, and advanced – represented symbolically by a three-leaf system) and that accreditation for operators in national parks should be mandatory:

We really need one system in my opinion. If you operate in a park or in a natural environment, then you need an accreditation system. It needs to have simple gradings, and people should be able to easily identify what those gradings mean. It should be mandatory for all operators. It is crazy to think that people do not think about that in running a business in a national park. They should be thinking about this stuff. We need to educate operators in terms of their business and updating their systems and ensure they are people who can deliver these values properly and that they are motivated and passionate about it.\textsuperscript{341}

\textsuperscript{336} Ecotourism Australia, submission no. 15, p. 3.
\textsuperscript{337} Ibid., p. 2.
\textsuperscript{338} Ibid., p. 2.
\textsuperscript{339} Mr G Ronan, Owner, Bothfeet Walking Lodge, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, pp. 63-65.
\textsuperscript{340} Bothfeet Walking Lodge, submission no. 57, pp. 1-2.
\textsuperscript{341} Mr G Ronan, Owner, Bothfeet Walking Lodge, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 64.
In their submission, Bothfeet took the emphatic view that any operator who ‘provides a nature based experience, either on private or crown land, either guided or self guided, should be considered a member of the eco-tourism industry, as the environment is a core component of their business that needs to be considered throughout their operations’.  

### 4.2.2. International eco-accreditation schemes

On its North American study tour, the Committee was made aware of eco-accreditation schemes operating in other jurisdictions, such as Canada’s GreenStep program, the UK’s Green Tourism Business Scheme and New Zealand’s Qualmark Enviro Awards. Globally, best practice accreditation schemes generally involve a rating system whereby participating businesses are regularly audited and awarded a ‘rating’ according to the organisation’s sustainability criteria. Accredited ecotourism ventures typically follow a number of sustainability principles including leave-no-trace practices in natural areas, the use of energy saving appliances and renewables, local community support and engagement, and waste reduction activities. Poverty reduction is also often an aim of ecotourism accreditation in developing economies. What follows is a selective overview of some key accreditation schemes; it is not designed as a comprehensive survey of all such schemes.

In Hawaii, the Committee met with representatives of the Hawaii Ecotourism Association (HEA). One of HEA’s main goals is to advocate for small group, low-impact tours that are culturally and environmentally sensitive. In support of this HEA runs several projects, including a certification program for ecotour operators in Hawaii funded by the Hawaii Tourism Authority, and a ‘peer review’ process, introduced in 2006, to assist HEA’s members and customers to differentiate between ecotour providers and promote intra-market competition. The HEA described a pilot program it has developed with the assistance of the University of Hawaii to support tourism businesses to adopt the principles and practices of ecotourism. The program identifies a range of measures against which business can be rated, from the use of energy saving appliances and waste reduction, to management practice and engagement with local communities and cultures. The scheme is designed around ‘levels’ of certification so that organisations can ‘move up’ the levels as they improve their sustainability practices. Businesses pay a fee to participate in the scheme and receive their rating after an assessment by a third-party auditor. The HEA acknowledged that visitor understanding of sustainable tourism and certification is very low. The organisation aims to educate people about how to recognise and interpret ecotourism certifications, so that certification can become a positive point of differentiation for participating businesses. The HEA is also looking to Ecotourism Australia as a best practice model in further developing its certification scheme.

---

342 Bothfeet Walking Lodge, submission no. 57, p. 1.
In Canada, the Committee met with representatives of GreenStep Solutions, which manages the Green Tourism Canada program, in partnership with the UK’s Green Tourism Business Scheme. The latter is the largest independent accreditation body in the world for sustainable businesses and practices, and has over 2,000 members across the UK and Ireland.346

GreenStep is a not-for-profit organisation that provides sustainability solutions to government, business and the tourism industry, and so far the Green Tourism Canada program has certified 26 operators in British Columbia.347 Businesses pay to participate in GreenStep and undergo auditing every two years. All auditors are employed and trained by Green Step to maintain consistency with grading, and are also trained to provide advice to business about improving their business. Businesses are rated on a scale from bronze to silver and gold levels. Most businesses are in the ‘silver’ category.348 GreenStep argued that a tiered system encourages businesses to improve and then move up the scale, and that there is a growing segment of the tourism market interested in sustainability and using green tourism businesses. Tourists are also becoming aware of the practice of ‘greenwashing’ – in which businesses claim green credentials without evidence. GreenStep is building partnerships with BC’s regional destination marketing organisations and with Destination BC to boost recognition of the program.

The Committee also met commercial travel industry representatives and operators on its study tour, who are actively promoting themselves through eco-accreditation, or association with sustainable products, such as carbon offsetting. An example of the latter is the Harbour Air company, which is a seaplane airline founded in British Columbia in 1982. Harbour Air includes a carbon offset in its pricing that is used to mitigate the environmental impact of flights, and works with the Vancouver-based Offsetters Climate Neutral Society, a not-for-profit company that invests funds into renewable energy and energy efficiency projects on behalf of various companies. Harbour Air claims to be North America’s first carbon neutral airline.349 The Committee also visited the commercial operator Eagle Wing Tours, which conducts sustainable wildlife watching tours in British Columbia. The company has offset 100 per cent of emissions generated by its tours, including emissions from its office-based operations and works with professional green-house gas quantifiers to audit and calculate the organisation’s carbon footprint. The company then purchases carbon ‘offsets’ from Offsetters Climate Neutral Society and The Carbon Fund.350

---

346 Green Business UK Ltd is the sole authorised advisory and auditing company for the Green Tourism Business Scheme, and monitors the performance of participating businesses against the scheme’s environmental criteria, see Green Tourism Business Scheme, ‘About us’, Green Tourism Business Scheme, accessed 25 September 2013, www.green-tourism.com/consumer/about-us/.
347 The program was extended to the whole of Canada in 2013, see GreenStep Solutions, ‘About’, GreenStep Solutions, accessed 25 September 2013, www.greenstep.ca/about/.
Closer to home, New Zealand’s Qualmark scheme is a broad based national quality assurance scheme for tourism operations and businesses, that provides both a symbol and star rating levels. For a fee, Qualmark licenses businesses to use the Qualmark logo, following a successful assessment process (the business rating being determined by Qualmark), and regular assessments are carried out for participating licence holders.\footnote{See Qualmark New Zealand, ‘Information and tools for existing Qualmark licence holders’, Qualmark New Zealand Ltd, accessed 22 May 2014, \url{http://www.qualmark.co.nz/licence_holders.html}.} While all businesses must meet environmental and social criteria to be accredited, for those businesses wishing to promote and be recognised for their sustainable tourism practices, Qualmark undertakes further assessment for the ‘Qualmark Enviro Awards’. These are awarded at three levels: Gold, which entails exceeding the highest levels of environmental and social responsibility and represents strong leadership and advocacy; silver, which represents exceptional levels of resource management and social responsibility; and, bronze which demonstrates outstanding levels of resource management and actions.\footnote{For further details see Qualmark New Zealand, ‘Looking for quality experiences?’, Qualmark New Zealand Ltd, accessed 22 May 2014, \url{http://www.qualmark.co.nz/quality_experiences.html}.}

In Central America, Costa Rica was an early, if not the earliest, destination to offer ecotourism products, and has developed its own unique accreditation system. Unlike the industry-based schemes mentioned above, the Costa Rican process for eco-accreditation is managed by the government. The Certification for Sustainable Tourism (CST) was established in 1999, is regulated by the Costa Rica National Accreditation Commission, and consists of a scale of five levels, indicated by green leaves, of sustainable tourism achievement. CST accreditation is an ongoing, continuous process, and while highly effective for participants, is regarded as laborious, time consuming and expensive.\footnote{See Turismo Sostenible CST, ‘Sustainable Tourism CST: Certification for Sustainable Tourism in Costa Rica’, Costa Rica Tourism Board, accessed 23 May 2014, \url{http://www.turismo-sostenible.co.cr/en}; and Lapos Rios, ‘Lapos Rios and its Sustainable Certification (CST)’, Lapos Rios Eco-Lodge, accessed 23 May 2014, \url{http://www.laparios.com/lapa_cst_faq.html}.}

The Committee is aware that the Global Sustainable Tourism Council (GSTC) aims to provide consistency between nationally-based accreditation programs by offering a benchmarking system to enable comparisons between different schemes.\footnote{Global Sustainable Tourism Council, ‘International standards’, Global Sustainable Tourism Council, accessed 16 April 2014, \url{www.gstcouncil.org/gstc-objectives/gstc-international-standards.html}.} One of the key objectives of GSTC is to facilitate the adoption and creation of universal principles for sustainable tourism, via the establishment and adoption of the Global Sustainable Tourism Criteria. The criteria are the minimum requirements that a tourism business should ‘aspire to reach in order to protect and sustain the world’s natural and cultural resources while ensuring tourism meets its potential as a tool for poverty alleviation’.\footnote{To develop these criteria, the GSTC consulted with sustainability experts and the tourism industry and reviewed more than 60 existing certification and voluntary sets of criteria around the globe. More than 4,500 criteria were analyzed and the resulting draft criteria received comments from over 2000 stakeholders. See Global Sustainable Tourism Council, ‘International standards’, Global Sustainable Tourism Council, accessed 16 April 2014, \url{www.gstcouncil.org/gstc-objectives/gstc-international-standards.html}.} Since the launch of the criteria in October 2008, the GSTC Partnership has focused on engaging all tourism stakeholders – from purchasers to suppliers to
consumers – to adopt the criteria. In 2011 GSTC recognised Ecotourism Australia’s Ecotourism and Advanced Ecotourism accreditation programs – one of only ten such internationally recognised programs by GSTC.

There was very little commentary from stakeholders to the inquiry on international efforts to create global standards for eco-accreditation. For those stakeholders who did comment on this aspect of accreditation, it was generally the view that a well-promoted national accreditation system, with good uptake rates was more essential, in the first instance, than a global program.

The Committee is impressed with the progress that has been made in recent years in extending eco-accreditation to almost 50 tour operators in Victoria. However, it notes that the majority of LTOs operating in the state’s national parks and the DEPI estate do not possess eco-accreditation, or any other accreditation that would attract longer licence periods. The vast majority of licences granted are for one year. While Parks Victoria does provide a level of incentives to operators to become accredited, it is important to note that, currently, operator licences are built on local standards such as general conditions, activity conditions, local conditions and special conditions. Overall, as the figures indicate, only a minority of LTOs have chosen to participate in an ecotourism accreditation scheme, and the evidence suggests that Victoria may be lagging behind other jurisdictions in the uptake of accreditation processes. Victoria has just over 10 per cent of all the operators and businesses eco-accredited by Ecotourism Australia in Australia.

The Committee concurs with many of the stakeholders to the inquiry who have argued for a greater uptake of accreditation across the state. Some stakeholders have also called for a national system of accreditation to be introduced. However, it is clear that Australia already possesses a long established industry-based national accreditation scheme for ecotourism operators and businesses in the form of Ecotourism Australia’s eco-certification scheme; a scheme that has three defined levels of certification, and is only one of a handful of such schemes recognised internationally by the Global Sustainable Tourism Council. The Committee is also aware that other jurisdictions, such as Hawaii, have looked to the eco-certification scheme of Ecotourism Australia as a model of best practice in this area. The Committee does not support the introduction of a government managed accreditation scheme, along the lines of the eco-accreditation scheme operating in Costa Rica. The Committee believes that the ecotourism industry in Australia is best placed to manage its own accreditation programs, which can support excellence in sustainability in the industry without being overly bureaucratic.

---


358 For example, see Mr R Grant, Executive Officer, Geelong Otway Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, pp. 56-57.

359 Parks Victoria also utilises the Victorian Adventure Activity Standards (AAS) to provide local industry standards which operators must meet. See Parks Victoria, submission no. 71, p. 4.
The key issue here is the poor uptake rate for eco-accreditation in Victoria. As detailed above, a number of stakeholders to the inquiry currently do not see, or are unsure of, the benefits of accreditation, and some operators are unwilling to commit time and money to processes which may not achieve a positive outcome in the marketplace. Nevertheless, the industry broadly understands the importance of accreditation to the future development and credibility of the sector. Best practice in Australia and internationally rests on an accreditation system that promotes sustainability in operations, while at the same time enhancing marketability. The most successful commercial operations on land and water in the nature-based and ecotourism sectors, in both Australia and internationally, are recognisably eco-accredited, and the global trend is towards higher standards in sustainability reflected in awards and ratings systems. The Committee sees the ecotourism sector in Victoria as still being in a relatively immature phase of development, and in the short term in need of support to alleviate market gaps and failures, in an industry, which, as Chapter One demonstrated, is projected to become a key contributor to the Victorian economy and workforce. It is vital that this state not fall behind its competitors, both here and overseas.

The Committee believes there is a role for government in facilitating the uptake of eco-accreditation amongst nature-based and ecotourism operators and businesses in Victoria. The Victorian Government needs to provide more support for operators and businesses to gain accreditation, and create rewards and benefits for those that do. The previous subsidy program, which was supported by Tourism Victoria and ran until 2012, should be re-instituted, for a limited period, allowing Parks Victoria to further support operators on public lands to reach eco-certified status or higher. Accordingly the Committee recommends that:

**RECOMMENDATION 4.1**

In the short term, while ecotourism is an emerging industry, Parks Victoria be funded to maintain a dedicated subsidy program to support nature-based and ecotourism operators on public lands gain eco-accreditation.

In addition to a subsidy program, the Committee also believes that an incentives program for accreditation needs to be developed. Tourism Victoria should create rewards for certified operators, in terms of promotional material and campaign highlights. Accordingly the Committee recommends that:

**RECOMMENDATION 4.2**

Tourism Victoria should create a promotional and marketing rewards program for nature-based and ecotourism operators who achieve eco-certification. The program will provide such operators with a higher profile in campaigns and other materials.

As demonstrated above, the Committee has heard arguments concerning exclusive access to national parks, and the need for a more competitively based licensing system. The Committee understands that there is wide diversity of commercial tourism products being delivered on
public lands, and that not all LTOs providing such services will necessarily require such advanced accreditation. However, for those operators providing, or wishing to provide, ecotourism and nature-based tourism products in high value, pristine and sensitive areas, such as national parks, it is preferable that such operators be accredited. Parks Victoria is best placed to determine those areas for which only eco-accredited operators should be given access. The Committee is also of the view that Regional Tourism Boards have a role in promoting accreditation, particularly if eco-accreditation will be subject to a form of government subsidy. The Committee therefore recommends that:

**RECOMMENDATION 4.3**

In assessing licence applications from tour operators in national parks, and determining the length of such licences, Parks Victoria will continue to give preference to those operators who possess accreditation. In particular, in highly sensitive areas of national parks that are the focus of ecotourism, Parks Victoria will issue licences only to operators who are eco-accredited.

Regional Tourism Boards (RTBs) work with the Victoria Tourism Industry Council to promote the benefits of accreditation to nature-based and ecotourism operators and businesses in their regions. In addition, RTBs will provide information to operators and businesses on how to gain access to an accreditation subsidy program.

The Committee is aware that the three level model of achievement in eco-accreditation has become an international norm. It also recognises that the Australian industry-based scheme, run by Ecotourism Australia, has a three level system of accreditation. There has been some criticism amongst stakeholders that accreditation, including its levels, needs to be more clearly branded, possibly with more distinctive symbols. The Committee believes that the tourism industry is best placed to determine how such branding can be delivered, and with the use of which symbols.

### 4.3 Ecotourism and commercial developments in national parks

As detailed in Chapter One of this report, the previous government had, in its 2006 *10 Year Tourism and Events Industry Strategy*, foregrounded the development internationally of a convergence between tourism and environmental sustainability. That strategy noted best practice sustainability models for ecotourism and commercial development in national parks in other jurisdictions, such as the United States, New Zealand and Canada. A major focus of *Victoria’s Nature-based Tourism Strategy 2008-2012* was to attract ‘high yielding visitors’ by

---


addressing product gaps in the ecotourism sector.362 The strategy highlighted that despite Victoria’s natural assets — including extensive national parks, an accessible coastline and compact size — Victoria was ‘lagging behind’ other states in terms of converting visitation into yield.363 The policy argued that the key to boosting the economic value of nature-based tourism was to support the creation of ‘authentic’ ecotourism experiences that encourage visitors to stay longer in regional areas and increase their spend.364

As part of addressing products gaps in the nature-based tourism sector, in 2010, the then Labor Government directed the Victorian Competition and Efficiency Commission (VCEC) to conduct an inquiry into the barriers that existed to the developments of Victoria’s tourism industry, and the creation of new tourist infrastructure.

Subsequently, the VCEC’s 2011 Unlocking Victorian Tourism report recommended the removal of the prohibition on private development of tourist facilities in national parks,365 and referred to best practice models of sustainable developments in national parks in other jurisdictions, such as Karijini National Park, Western Australia, Cradle Mountain-Lake Saint Clair National Park, Tasmania, and Fiordland National Park, New Zealand.366 The Coalition Government supported recommendations of the VCEC report, including all of the land-use planning and the management and use of public lands recommendations.367 As referred to in Chapter One, the 2013 guidelines released by the Victorian Government focused on providing opportunities for ‘appropriate and environmentally sensitive investment opportunities in national parks’, and provided for a five stage approval process for proposals that are to be considered in relation to eight high level principles.368 To re-iterate: The guidelines state that the greatest net public benefit of a proposal will be determined by considering three outcomes, which comprise environmental, social, and economic outcomes.369

In 2013 the National Parks Act 1975 was amended to allow for changes to leases and licences in national parks. Prior to these changes, leases in national parks could only be granted for a maximum of seven years for a camping ground, or up to 20 years for a kiosk, store, or ski tow. A few national parks did have longer lease periods available for up to 50 years, including Mount Buffalo National Park, and the lighthouse at Wilsons Promontory.370 In addition, amendments to the Crown Land (Reserves) Act in 2009 increased the maximum lease duration on Crown land to

---

363 Ibid., p. 11.
364 Ibid., p. 11.
369 Ibid., p. 3.
65 years. New sections of the National Parks Act 1975 provide the Minister with powers to grant leases not exceeding 21 years, and to give in-principle approval of longer term leases up to 99 years, and the power to grant such leases. The Minister is also empowered to grant licences associated with such lease arrangements.

4.3.1 Views of stakeholders

There was considerable discussion amongst stakeholders over the best way to manage land for tourism across the state, and a general concern about the possible environmental impacts of increased tourism on natural areas. In particular, the Committee received numerous submissions from individuals and organisations opposed to, or in favour of, commercial developments within national parks. Some stakeholders do not want any commercial development in national parks, and view development in nearby towns as wholly adequate for tourism’s needs. Others want Victoria to come into line with other jurisdictions — Western Australia, Tasmania, New Zealand, and Queensland — that have, or are in the process of developing, sustainable commercial projects in national parks and public land settings.

The Victorian National Parks Association is strongly opposed to commercial developments in national parks, arguing that they are at high risk of failure (often requiring government bail-out), subject to the risk of fire, inevitably grow in size over time, and are an added burden on park budgets. Moreover, developments outside national parks are able to best meet the needs of visitors. Further, the Association has expressed concern about the guidelines for development in national parks, arguing that:

They are vaguely worded, and quite lacking in clearly articulated accountability when development proposals go wrong ... And importantly, in the Victorian guidelines, the all-important environmental impact assessment for a proposal is not required until after the public interest assessment stage. Any environmental impacts by a proposed development will not, it appears, be subject to public scrutiny!

Other groups have also expressed concern that increased tourism in national parks may damage the very qualities that make these areas attractive to visitors. For example, Environment East Gippsland argued that ‘allowing 99-year leases in park land is as good as a private sale. It is clearly the thin end of the wedge that will exploit an area to near death (a-la Gold Coast).’

371 Ibid., p. 5.
372 See sections 19G, 19H and 19I, National Parks Act 1975. Agreements to lease land under new sections 19G and 19I will be ‘subject to conditions that prevent or minimise any adverse impact on the park (including its natural, indigenous, historic, cultural, landscape and recreational values) by the development or use of the land that is permitted under the agreement’, see s. 19J(2). See P Darby, R Macreadie, C Ross and B Lesman, National Parks Amendment (Leasing Powers and Other Matters) Bill 2013, Research Brief, No. 4, Parliamentary Library Research Service, Melbourne, 2013.
373 Victorian National Parks Association, submission no. 67, p. 7.
374 Ibid., p. 8.
375 Environment East Gippsland, submission no. 31, p. 1.
The Committee received a number of short submissions from individuals concerned about developments in national parks. For example, Ms Anna Burns suggested that developments in national parks ‘will ... degrade the natural and cultural heritage features of those areas. It is totally unnecessary for private tourism developments to occur in national parks. It would be much more appropriate for such development to occur outside park boundaries on adjacent land’. Mr Tom Tootell suggested in his submission that a clear distinction should be drawn between national parks and state forests, with an embargo on any further development in the former, and an ‘envelope of land in or around’ the latter, where ‘a sense of destination can be established’. Lou Baxter submitted that:

Our national parks are treasured repositories of our natural heritage and, as such, belong to future generations as well as present. Indeed Victoria’s national parks are especially important because of the high land clearances and ongoing degradation of the natural environment that has occurred in Victoria ever since European settlement.

Mr Roger Grant from Geelong Otways Tourism supports commercial developments in parks as they can greatly benefit regional areas with appropriate management and controls. At a public hearing in Port Campbell Mr Grant argued that:

With effective management and control, there is a win-win: a win for the environment and a win for the tourism industry through quality experiential accommodation and attractions. If we do not deliver this, we will not deliver the yield that the tourism industry is so desperate for. Simply walking on a beach, whether it be at Gibson Steps, or on the Great Ocean Road walk is not going to generate the level of economic activity that we need. So again that infrastructure is absolutely critical.

Mansfield Shire Council argued strongly that the Victorian Government should take a more proactive approach to encouraging commercial eco-developments in national parks. At the public hearing in Mansfield Ms Judy Dixon, Deputy Manager, Tourism and Economic Development, for the Council stated that:

To sit on our hands and wait to assess the applications from the private sector is not, in our opinion, proactive enough if we want to create the iconic product that will position Victoria in a league with other destinations such as New Zealand, Tasmania and other world-class sites around the world.

Ms Dixon went on to say that, ‘we believe there should be clear expression of both what is and is not desirable in terms of development locally and tick off some of the steps to encourage

---

376 Anna Burns, submission no. 33, p. 1
379 Mr R Grant, Executive Officer, Geelong Otway Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 55.
appropriate development without being too prescriptive or fettering the private sector’. 381 Mr Michael Watson, representing Adventure Victoria, suggested that government could play a role in funding eco-lodges within the Alpine National Park, arguing that, ‘it is one of those things where you would really be looking for government to play a lead role in supporting the establishment of such a facility, and then it would be a user-pays system’. 382 Mr Watson said that the management of such eco-lodges could be undertaken privately under lease arrangements with Parks Victoria.

At the public hearing in East Gippsland, officials from the East Gippsland Shire Council regarded ecotourism as a growth area for the region. The Director of Development, Mr Paul Holton, said that ‘Cape Conran is a fantastic example of an appropriate development in a very sensitive area. It has been developed through Parks Victoria. I guess the market that utilises it is very sensitive to the environment; it is very low impact’. 383 The Shire is hoping that the Coastal Wilderness Walk between Marlo and Mallacoota will be developed with appropriate infrastructure. 384 As Chapter Three of this report demonstrated, amongst tourism industry groups, regional tourism boards and tour operators there is generally an understanding of, and support for, the benefits of sustainable commercial development on public lands.

None of the witnesses to this inquiry called for unfettered or open development of national parks, and nearly all stakeholders were keen to point out the primary need for the state’s national parks estate to be preserved and conserved. However, there is a clear division in opinion amongst the stakeholders to this inquiry about how this can be achieved.

Ecotourism Australia notes that increased visitation in national parks will need to be supported by improved services, and be carefully managed to conserve the environment. The organisation notes that ‘an increase in ecotourism will mean an increase in visitation and expectations for Victoria’s National Parks. This will need to be matched by a proportional increase to base and capital funding for National Parks’. 385 Further, ‘long term support for the management of Victoria’s protected areas is critical to the success of ecotourism. Any devaluing of protected areas through inappropriate grazing, hunting and extractive industries devalues the potential for ecotourism’. 386

At the public hearing in Melbourne the Chief Executive of Ecotourism Australia, Mr Hillman, summarised the issue of commercial development as follows:

381 Ibid., p. 352.
384 On its trip to East Gippsland, the Committee visited, and stayed in the Cape Conran Coastal Park, near Marlo. Parks Victoria manages onsite accommodation at the Park, including a traditional camping ground, cabins, a lodge with dormitories and Wilderness Retreat Tents. The Retreats have attained Advanced Ecotourism certification through Ecotourism Australia, and are designed to provide a higher level of comfort to visitors, with minimal impact on the surrounding area. The Retreats sit on an innovative modular galvanised steel frame that does not require concrete footings, which touches the earth lightly. There is a communal kitchen and shared bathroom facilities. Parks Victoria, ‘Stay in a wilderness retreat’, Parks Victoria, accessed 11 June 2014, http://parkweb.vic.gov.au/explore/parks/cape-conran-coastal-park/things-to-do/stay-in-a-wilderness-retreat.
385 Ecotourism Australia, submission no. 15, p. 3.
386 Ibid., p. 3.
The specific questions asked by this inquiry are addressed in our submission, but one issue I would like to discuss is the controversial issue of development within national parks. There are many divergent views here, with strong support for a no-development approach where members of conservation groups are philosophically opposed to any commercial development and see this as the thin edge of the wedge: once the door is open, more is sure to follow. History would show that once areas are open, they are rarely, if ever, closed.\(^\text{387}\)

Mr Hillman went on to say that not all tourism operators and developers are to be feared. He argued that:

Many have a deep and abiding conservation ethic, and Ecotourism Australia supports a measured and case-by-case approach to this issue as long as strong protective measures are in place. National parks and other protected areas are special places, and the standards that people and organisations must adhere to need to be much higher than elsewhere. Above and beyond the current guidelines, there needs to be a range of further protections and considerations — meaningful protections from the ‘what if’ scenarios, where a development may not be successful or have unintended consequences. Either a robust insurance measure or bond should be required; otherwise the park — that is, the Victorian government — will be left to clean up the mess.\(^\text{388}\)

Throughout the inquiry there has been some discussion of whether Victoria’s process for encouraging commercial development in national parks represents best practice. Parks Victoria acknowledged that Victoria is only beginning a process that has operated for some time in other jurisdictions. At a public hearing in Melbourne the General Manager, Visitors and Community, for Parks Victoria, Mr Ian Christie, stated that:

Victoria is trying to provide opportunities for high-quality tourist attractions very sensitively built and sited. If you look nationally, we are trying to get into that space and are behind some other jurisdictions, as the previous witness from Tourism Victoria mentioned. Tasmania has a number of lodges — at Cradle Mountain, Wineglass Bay, which is just out of a park. There is also Kangaroo Island, central Australia — Uluru — Kingfisher Bay in Fraser Island. A number have been operating successfully for a number of decades. Internationally there are numerous examples.\(^\text{389}\)

The General Manager of Environment and Heritage for Parks Victoria, Mr Ian Walker, explained at the same public hearing that:

Jurisdictions in Australia are very much going through, I guess, this opportunity for tourism development in parks. Western Australia went through this process of identifying suitable sites for opportunities in parks. A number of examples spring to

\(^{387}\) Mr R Hillman, Chief Executive, Ecotourism Australia, Environment and Natural Resources Committee public hearing – Melbourne, 7 November 2013, transcript of evidence, p. 106.

\(^{388}\) Ibid., p. 106.

\(^{389}\) Mr I Christie, General Manager Visitors and Community, Parks Victoria, Environment and Natural Resources Committee public hearing – Melbourne, 7 November 2013, transcript of evidence, p. 99.
mind, including the Ningaloo coast, with eco-retreats, not dissimilar to what we have in Victoria, established on the coastline of a very sensitive environment there and done in an environmentally conscious and friendly way. Again, in Karijini National Park there is eco-tent-type accommodation supporting a higher yield market and basically increasing visitation — particularly in Western Australia’s case — to a more remote environment. There are certainly good examples of where those things are occurring in national parks right across Australia.390

4.3.2 Models of best practice in other jurisdictions

The Committee is aware of how government and land management agencies in the United States and Canada have long grappled with the challenges of managing conservation works, visitor services and commercial development in national parks. On its North American study tour the Committee met representatives of the US National Park Service (NPS). The NPS grants licences, known as ‘concessions’, for operators and businesses to operate and deliver services in national parks. Commercial operations in US national parks are covered by the Concessions Management Improvement Act 1998 which requires that all concessions operations are ‘limited to those that are necessary and appropriate for public use and enjoyment’ of the relevant national park. Concessions must also be ‘consistent to the highest practicable degree with the preservation and conservation of resources and values of the park unit’.391

Overall the US National Park Service administers a commercial services program that includes more than 500 concession contracts, covering areas such as food services, accommodation and coach tours. Concessioners employ over 25,000 hospitality workers in peak season, and annual gross receipts are US$1 billion.392 Concession contracts are usually valid for 10 years, but can range up to 20 years. Commercial Use Authorisations are often issued to permit small-scale activities in parks, such as guided tours or rafting ventures. The NPS also provides some leases for land or buildings within parks, which can extend up to 60 years in order to ensure a viable return on investment for the operator. Concession contracts are issued following the release of a prospectus package from the NPS and a competitive tendering process.393 Concessions are generally required to adopt a range of sustainability practices to minimise the impact of operations on the park. Further, the prices charged by concessioners for their goods and services must be approved by the NPS.

Hawaii Volcanoes National Park provides an example of best practice in terms of managing commercial development within a national park area. The Park is listed on the UNESCO World

Heritage List. Accommodation had been managed by private operators prior to the park’s designation in 1916. Today, private operators provide retail and accommodation services in the park, and bus companies can acquire permits to tour within the park. Onsite accommodation at the park is provided at ‘Volcano House’, which has operated since 1846 (although not in the same building). In 1974 the House was placed on the National Register of Historic Properties. It was closed for renovations in 2009 and re-opened in 2013 following the issuing of a new concession contract and extensive renovations. Following the management agreement negotiated with the NPS, rooms at Volcano House do not have televisions, the onsite restaurant is committed to serving locally-sourced produce, and housekeeping services are designed to minimise waste. Volcano House is a good example of an existing infrastructure footprint within a national park being re-used in a sustainable and sensitive manner.

In San Francisco, the Committee visited Fort Baker, an historic army post located at the Marin Headlands and part of the Golden Gate National Recreation Area operated by the National Park Service. The Committee visited Fort Baker to view how the site’s military buildings have been converted into an accommodation lodge and restaurant. The post was built between 1902 and 1910 and was active as a military site until the mid-1990s. When the military donated the 335 acre site to the National Park Service in the 1990s the NPS and the Golden Gate Parks Conservancy undertook extensive planning to identify the different options for developing the site. A number of different plans for the military buildings were mooted but the option of developing accommodation and a restaurant was viewed as the only financially sustainable option.

The development at Fort Baker has retained the same building ‘footprint’ that was present when the site was used by the military. This has meant that a number of buildings have been restored and converted into accommodation, while some older buildings were demolished and replaced with new buildings. The NPS set environmental standards for the concessioners at Fort Baker, including that buildings must meet LEED (Leadership in Energy & Environmental Design) standards. The concessioners have secured a 70 year lease for the lodge, to ensure that returns can be generated above the cost of capital improvements. In addition, the NPS undertook improvements at the site, including maintenance on roads and electricity infrastructure. Fort

---

394 The park was established in 1916 and is located on the island of Hawai‘i (The Big Island). The park includes two active volcanoes: Kilauea, one of the world’s most active volcanoes, and Mauna Loa. Constant volcanic eruptions at the Park have created a unique geological landscape. The park also features a number of rare bird species, forests of giant ferns and the archaeological remains of Native Hawaiian villages, temples and graves. The park is in the process of developing a new General Management Plan to be released in 2014 to cover the management of the park for the next 15-20 years. A consultation is currently underway inviting the public to comment on what visitors’ value most about the park and suggestions for the future. Across two days the Committee received guided tours from rangers focusing on geology, biodiversity, and Native Hawaiian culture. See National Park Service, ‘Hawai‘i Volcanoes National Park’, National Park Service, accessed 25 September 2013, www.nps.gov/havo/index.htm.


Baker is an example of sustainable best practice in the conversion and adaptive re-use of an old military site within a national park, without expanding beyond the original infrastructure footprint.398

In San Francisco the Committee also visited the Presidio, an urban park and former military base on the northern tip of the San Francisco Peninsula and also part of the Golden Gate National Recreation Area. The re-development of the Presidio site, which was established as a fort by New Spain in 1776, provides a unique case study in national parks and financial self-sufficiency. In 1996 the Presidio came under the management of the Presidio Trust, a US Government corporation established by an Act of Congress. The Trust has managed the transformation of over 300 historical buildings at the Presidio, removed Army landfills, restored natural areas, and updated the park’s infrastructure. The Presidio works in partnership with the Golden Gate Parks Conservancy and the National Park Service.399 Given the extensive infrastructure and conservation challenges of the site, the Presidio Trust was developed as a stand-alone federal agency to manage the development of the site when it was donated. Due to rents from commercial operations within the Presidio, the Presidio became financially self-sufficient in 2013.

The Presidio has prompted discussion about the commercialisation of national parks and the balance between conservation and accessibility. A number of commercial uses exist within the Presidio, generally in refurbished military buildings, such as an accommodation lodge. The Presidio Trust retains ownership of all buildings within the park and takes responsibility for maintaining communal infrastructure. As with other NPS sites, development within the Presidio must not exceed the existing building footprint. The Presidio was the first site in the US to achieve the status of a LEED neighbourhood under criteria that recognises the adaptive re-use of heritage buildings.400

New Zealand has been consistently mentioned throughout this inquiry by various stakeholders as an example of best practice commercial development in national parks. Any business or organisation that wants to use public conservation land for their activities needs to get permission from the Department of Conservation in the form of a concession, which is a legal

---

398 The development of Fort Baker was supported by the local chamber of commerce in Sausalito, who viewed the project as important in attracting more visitors north of the Golden Gate Bridge. The project also had a focus on employing local people from within Marin County. The NPS and the Conservancy are currently examining ways to improve the park experience for day trippers and low-income visitors, such as expanding the range of accommodation and food options available. The NPS also manages a range of free public events and ranger tours in the park as is common throughout the national park system. See also National Park Service, ‘Fort Baker Publications’, National Park Service, accessed 25 September 2013, [http://www.nps.gov/goga/planyourvisit/foba_pub.htm](http://www.nps.gov/goga/planyourvisit/foba_pub.htm).

399 The National Park Service manages the coastal areas inside the Presidio while the Conservancy coordinates and mobilises volunteer resources and runs community programs, among other activities. See Presidio Trust, ‘The Presidio and Presidio Trust’, Presidio Trust, accessed 25 September 2013, [www.presidio.gov/about/Pages/about-the-presidio-and-presidio-trust.aspx](http://www.presidio.gov/about/Pages/about-the-presidio-and-presidio-trust.aspx).  

400 The Presidio Trust is now in its 2nd stage of development to improve the visitor experience. A new heritage centre and restaurant will tell the history of the Presidio, and provide a focal point for tourists. The centre will also include an archaeology lab to deliver education and volunteer programs. The Trust is also creating new walking trails within the park. See Presidio Trust, ‘About the Presidio Trust’, Presidio Trust, accessed 25 September 2013, [http://www.presidio.gov/about/Pages/about-presidio-trust.aspx](http://www.presidio.gov/about/Pages/about-presidio-trust.aspx).
requirement under the *Conservation Act 1987*. There are currently over 4,000 concessions operating on New Zealand public land, and over 500 of these are for guiding, while almost 500 are for accommodation. Application, processing and ongoing fees are charged for concession applicants. All applicants must complete an environmental impact assessment, and a range of conditions are attached specific to the site and the proposed activity.

Both the Routeburn and Milford Tracks are regarded as among the world’s most iconic walks, attracting walkers from around the globe. The New Zealand iconic walks cater for two markets – those who are comfortable with national parks accommodation in basic hut facilities, with bunk bedding and self-catering; and those who wish to take a guided walk and stay in more comfortable private accommodation, with share rooms and meals provided. The private huts are run by Ultimate Hikes New Zealand, which gained the concession for private guided walks on the Routeburn Track in 1989, and for the Milford Track in 1992. This company is the only one permitted to conduct multi-day guided walks on these tracks, and is eco-accredited under the New Zealand system described earlier in this chapter, and carries the Enviro Award Gold Qualmark logo. The company is involved in track maintenance, and has a range of sustainable practices underpinning its operations, including waste and energy reduction, water conservation, local conservation activities, local produce purchasing and community engagement.

Tasmania has been at the forefront of sustainable commercial development in national parks. At the public hearing held in Hobart, the Director of Visitor Services with the Tasmanian Parks and Wildlife Service, Mr Stuart Lennox, explained that the mission of the organisation was to create a world-renowned reserve system, conserving the state’s natural heritage, while providing for both the sustainable use and economic opportunities for the Tasmanian community. He went on to say that the model employed by the Service to build iconic walks in national parks was as follows:

We identified early on that we needed at least a ‘two experience’ model. What I mean by that is that we provide the independent experience and that we needed somebody to provide the commercial guided experience. To me they are a fundamental component to building iconic walks. If you look at the iconic walks

---


406 Mr S Lennox, Director Visitor Services, Tasmanian Parks and Wildlife Services, Environment and Natural Resources Committee public hearing – Hobart, 13 February 2014, transcript of evidence, p. 223.
across Australia and New Zealand, those two elements need to be there. That is not to say you cannot just build an independent walk and make it successful but I think you get so much more leverage by having those two elements. 407

The Tasmanian Parks and Wildlife Service manages a reserve system of 483 different reserves, totalling 2.92 million hectares of land and water. About 200 commercial visitor service licences and leases are in operation on the reserves. As an organisation, the Service generates over 20 per cent of its income from a range of business and commercial arrangements, and manages 21 business enterprises across the state. According to Mr Lennox, the income generated by the Service is consistently about twice that of most other Australian states’ park systems. The Service also operates a park entry fee system, which currently generates over $11 million per annum. 408

Mr Lennox stated that there were few places where parks fees covered park operations – the one major exception being the Overland Track at Cradle Mountain. He went on to say that partnerships with industry were crucial, and that they delivered for the state on a variety of levels, including regional dispersal:

That partnership between us and the industry is crucial, I think. I have already talked about it. In terms of building those iconic experiences and in terms of maximising the opportunity in terms of bringing the breadth of visitors that we can to the locations, the goal here is to provide better access to a far greater part of the community. The thing about these operations is they are well run, they have great guides, they are employing people of all ages doing the guiding and their operational support. They are based in regional areas. 409

The Overland Track is the foremost iconic walk in Tasmania, has a high level of international visitation (around 25 per cent of the total), and according to Mr Lennox, is consistently rated as one of the top 10 walks in the world. 410 The Committee visited the northern end of the Cradle Mountain – Lake St Clair National Park, which is the starting place for the 65 kilometre, six-day Overland Track walk. In 1922 the land between Cradle Mountain and Lake St Clair was declared a scenic reserve, before national parks were formally established in Tasmania during the 1970s. The Park covers approximately 161,000 hectares and is part of the Tasmanian Wilderness World Heritage Area, which covers 1.4 million hectares and approximately one-fifth of Tasmania. The area was inscribed on UNESCO’s World Heritage List in 1982. 411 Along the Overland Track, the Service operates a series of campsites and cabins; basic accommodation providing for self-catering and bunk beds. During the peak summer walking season visitors must pre-register their walk with the Parks & Wildlife Service to prevent over-crowding on the Track. All walkers on the Track must pay a fee of $200. These fees are used for track maintenance. 412

---

407 Ibid., p. 232.
408 Ibid., pp. 225-227.
409 Ibid., p. 234.
410 Ibid., pp. 224-225.
A number of privately operated eco-huts are also located along the Overland Track. These huts are for the exclusive use of participants in guided walks provided by a private company. In 1985 the Tasmanian Government called for expressions of interest for commercial operators interested in building huts and conducting walking tours within Cradle Mountain – Lake St Clair National Park. The first huts were constructed by the Cradle Mountain Huts Walk in 1987, subject to the government’s environmental guidelines. The company, now known as the Tasmanian Walking Company, has an Advanced Eco Accreditation by Ecotourism Australia. A similar walking experience was opened at the Bay of Fires in 1999. The company promotes itself as incorporating sustainable travel practices into all aspects of its business, follows best practice track guidelines on its walks, removes all waste from huts, camps and lodges and recycles where possible. The company’s agreement with the Parks Service provides for the payment of a licence fee and track fees for each walker. According to Mr Lennox, such operations bring a new client group into the parks system:

Cradle Huts is bringing a client group of about 1½ thousand clients a year. These are clients that would not normally walk the Overland Track. These are clients that are of a demographic that would not normally have that experience. ... the reality is they are bringing people into our reserves that would never have had that opportunity previously. That is the approach we adopt.

Another successful development model for commercial investment in national parks is the ‘Naturebank’ system used by Western Australia’s Department of Parks and Wildlife, in partnership with Tourism Western Australia. This initiative, which was launched in 2009 and is supported through the WA Royalties for Regions program, aims to prepare sites for the development of sustainable tourism accommodation experiences in the state’s national parks. It provides opportunities for experienced developers to create ‘exceptional ecotourism experiences that provide visitors with an appreciation of natural and cultural values’. This process involves an analysis of each potential park site, focusing on its particular environmental and heritage assets and its potential for development. The Department of Parks and Wildlife produces a proposal for tourism development that includes very stringent environmental conditions, and this is put to an expression of interest process. If the Department of Parks and Wildlife does not receive any expressions of interest that satisfy their criteria for development of the site then the proposal is ‘banked’ for a future expression of interest process.

Under this scheme several of Western Australia’s national parks have developed high-end high yield ecotourism ventures, which provide ongoing funding for the maintenance and management of the individual parks where the development has occurred. Overall, there are approximately 340 commercial tour operators who are licensed to operate in Western Australia’s national parks,

---

414 Ibid.
416 See Tourism Western Australia, Naturebank – Extraordinary Ecotourism Development Opportunities in Western Australia, Government of Western Australia, 2011, p. 3.
417 Ibid., p. 3.
most of which are engaged in delivering tours. Commercial leases are currently on a 21 year basis with a potential 21 year extension, but the WA Government is legislating for the introduction of 99 year leases. The Committee heard from Mr Rod Quartermain, Manager of the Policy and Tourism Branch at the Department of Parks and Wildlife, who described the Naturebank process, and how government supports each initiative, as follows:

We set KPIs, and there is a very robust auditing process. The government assembles the land and lowers the investor risk by doing all of that work prior to putting it out into the market for commercial development. It might take two or three years of work of doing environmental clearances, flora and fauna, heritage clearances, hydrology studies and all of those things that a developer would normally do, and it is very expensive in those areas. We do a prerelease investor attraction process... We provide as much information as we can to allow investors to make an informed submission. We also provide some infrastructure support in relation to the development of water, power and waste management.418

Mr Quartermain described the process as having a ‘triple-bottom-line’ in environmental, social and economic sustainability. He said that, ‘we set out very strict guidelines for proposals, without telling them what to build, because there might be two different solutions that are perfectly acceptable. We make contributions to infrastructure and we take a partnership approach about the terms and conditions that we have to make sure that it is going to work for both of us.’419

Mr Quartermain emphasised that the process of commercial development was not development at any cost, but one that recognised the inherent risks in remote development, not just to the developer but to the Department of Parks and Wildlife and to the management of the park.420 Social and environmental conditions attached to developments include: The use of renewable energy; retaining the impact to a certain footprint; water conservation; local produce purchasing; employment of local people, including Indigenous people; and a high level of interpretation and explanation of the particular environment in which they are working or sited.421

Mr Quartermain stated that the program was about broadening the experience and the access for people to WA’s national parks, and that it achieves this by being differentiated from existing facilities. He gave the example of high-end tent private accommodation in the Ningaloo area, in the Cape Range National Park, where visitors pay about $700 per person per night. There are nine wilderness tents at the Sal Salis Ningaloo Reef site and 100 per cent of the camp's power is generated by solar power. The company has a range of environmental and social practices, including waste reduction and removal, local purchasing, water conservation, and educational guiding. In addition to park entrance fees, five per cent of the company’s turnover goes to the

418 Mr R Quartermain, Manager Policy and Tourism Branch, Department of Parks, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 259.
419 Ibid., p. 259.
420 Ibid., p. 253.
421 Ibid., pp. 255-256.

In terms of the development and management of leases and licences under Naturebank agreements, Mr Quartermain stressed the need for highly effective auditing. In the development tender phase, the Department of Parks and Wildlife employs a panel of qualified environmental auditors, who conduct both site and document audits. Once established, audits of developments are conducted annually:

Their footprint is designated in the lease, and as I said there are measurements of their footprint. They are restricted to a certain number of clients that they can service. They are restricted to the amount of water per client they can use. That footprint is measured, and we assess it every year with this audit. Our sustainability audits are done by external fully qualified environmental auditors. They are not looking at the economics; they are looking at the environmental sustainability and the social sustainability. That report comes back to us, because it is also an audit on our management of the facility. All our terrestrial lands are vested in the Conservation Commission of Western Australia, which owns the management plans; and we are audited against those and use those external audits to demonstrate our compliance with the objectives of the management plans. There is a level of accountability all the way around.\footnote{Mr R Quartermain, Manager Policy and Tourism Branch, Department of Parks, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 256.}

The Committee appreciates the high level of interest, and in some instances concern, amongst stakeholders and contributors to this inquiry in relation to commercial development in national parks. For many years governments of both persuasions have managed Victoria’s national parks on the basis of limited commercial development occurring within them. From many of the submissions to this inquiry it is clear that this long-established practice retains support, and from this perspective almost no development, however sustainable, is regarded as either necessary or desirable. For others – including operators, industry groups, local tourism agencies and local government – there is support for appropriate sustainable commercial development in national parks.

From the evidence presented to this inquiry, the Committee has formed the view that sensitive, environmentally sustainable, commercial accommodation on a small-scale can be developed within national parks settings where appropriate. There are models of best practice, some of which are outlined above, both from within Australia and overseas, that demonstrate that this approach is feasible and successful. The examples provided by Tasmania’s Overland Track, Western Australia’s Ningaloo retreats, and New Zealand’s Routeburn and Milford Tracks, demonstrate high levels of sustainability, with positive environmental, social and economic outcomes. It is important to note that best practice in this area does necessitate a high level of
involvement by land managers, not only in the lead-up and proposal stages, but throughout the life of the development. The Committee believes that the role of government is crucial to ensuring that commercial development in our national parks achieves the right end result. It is vital that Parks Victoria play a lead (but not exclusive) role in managing the development of commercial development on a sustainable basis across the state, with the collaboration of the Department of Environment and Primary Industries, and other agencies, including Regional Tourism Boards. The Committee supports a transparent development process, one which entails forward planning, and the application of stringent conditions and environmental standards. The Committee believes the Victorian Government can look closely at the processes and practices of other jurisdictions, such as Western Australia and Tasmania, in this regard.

The Committee sees Victoria as lagging behind other Australian jurisdictions in developing sustainable commercial development on public land, particularly in the area of huted accommodation on iconic walks. Expenditure has already been devoted to the development of the Great Ocean Walk, and the Grampians Peaks Trail, and proposed for the Coastal Wilderness Walk. Victoria lacks the necessary small-scale (private and public) accommodation along these and other walks for them to reach their full potential. The Committee does acknowledge that some tourism regions have been active in working with industry stakeholders to identify sites for appropriate development. These are discussed in the following section. The Committee also believes that in some circumstances it will be more appropriate for development to occur outside, or adjacent to a national park. Large-scale accommodation, along the lines of commercial lodges such as Peppers Lodge at Cradle Mountain, should generally be sited outside the park. The Committee is also of the view that where a current infrastructure footprint exists within a national park, that footprint can be the site for re-development, provided that a stringent environmentally sustainable framework forms the basis for that development.

Overall, the Committee believes that the weight of evidence suggests that commercial ecotourism developments on public lands do not contribute to large-scale tourism impacts on the environment. In fact, when properly managed, such ventures have minimal environmental impacts, and entail relatively low numbers of visitors to a given destination. At the same time, ecotourism ventures generate income for, and lift the profile of, national parks, and provide access to national parks to groups who would not normally have such access. Ecotourism has other positive effects: It has high educational values; generates local employment and the use of local products; increases regional dispersal; and, increases awareness of environmental sustainability. The Committee believes that the Victorian Government should take a proactive role in identifying and preparing sites in national parks’ settings that can be developed sustainably and appropriately by private investors. Parks Victoria will take a lead role in this process, collaborating with the Department of Environment and Primary Industries, Tourism Victoria, Regional Tourism Boards, local government, and industry groups and operators. Each case should be assessed on its merits, and the underlying principle for commercial development should be that no development takes place unless it satisfies a ‘triple-bottom-line’ in environmental, social and economic sustainability. The Committee therefore recommends that:
RECOMMENDATION 4.4

The Victorian Government should take a proactive role in identifying and preparing sites in national parks that can be developed sustainably and appropriately by private investors. Parks Victoria will take a lead role in this process, collaborating with the Department of Environment and Primary Industries, Tourism Victoria, Regional Tourism Boards, local government, and industry groups and operators.

- A priority area for commercial attraction should be the development of eco-accredited lodge accommodation to support the state’s iconic walks.

The Committee is of the view that best practice in this area involves a high level of accountability throughout the life of the proposed development for all participants. It believes that the Victorian Government should refine the expression of interest process for attracting commercial development in the state’s national parks. Accordingly the Committee recommends that:

RECOMMENDATION 4.5

The Victorian Government refine the expression of interest (EOI) process for attracting commercial development in the state’s national parks. Master plans for commercial developments within national parks will set out strict guidelines for proposals, based on a ‘triple-bottom-line’ of environmental, social and economic sustainability. All proposals for commercial development should be independently audited by environmental auditors prior to approval.

- Parks Victoria will ensure that all commercial developments in national parks are audited on a regular basis to ensure their compliance with lease and licence agreements.

The Committee is supportive of the aspirations of the Victorian Government and Parks Victoria to build and promote iconic walking tracks, such as the Great Ocean Walk, Grampians Peaks Trail, and the Coastal Wilderness Walk. The Committee heard evidence that best practice development for iconic walks involves the implementation of a ‘two experience’ model. Such a model provides for both an independent experience and a commercial guided experience as the fundamental and complementary components to building an iconic walk. Essential to such a model is the provision along the walking track of both public and private accommodation facilities, as witnessed, for example, in Tasmania’s Overland Track, and in walks throughout New Zealand. In this model, public accommodation is managed by the park manager, and is centred on low cost, self-catered and shared facilities, while the private accommodation has a higher level of comfort, privacy and catering, and can be part of a guided experience. Both are managed to the highest standards in sustainability. The Committee believes that the Victorian Government should give consideration to a ‘two experience’ model in developing the state’s iconic walks, so that the broadest range of visitors can have access to, and enjoyment of these destinations. Accordingly the Committee recommends that:
RECOMMENDATION 4.6

In developing the state’s iconic walks, the Victorian Government should give consideration to a ‘two experience’ model so that the broadest range of visitors can have access to, and enjoyment of these destinations.

- This model typically includes the provision of both public facilities such as huts and camping sites and privately owned and managed eco-lodge accommodation.

4.4 Funding sustainable ecotourism development

As discussed above, the Committee is aware that private investment has been used to support the expansion of the ecotourism sector in Western Australia, New Zealand, Tasmania, and other jurisdictions. The Committee also heard about a user-pays model for national parks — such as the park access fees introduced by the Tasmanian Parks and Wildlife Service — which contributes to the cost of maintaining parks and to the development of new walking tracks.

4.4.1 Attracting investors to the ecotourism sector

In response to the Victorian Government’s recent decision to encourage commercial investment in national parks, the Committee heard a range of views on how the government can attract investors to develop world class ecotourism experiences. However, a number of stakeholders expressed frustration about the role of government agencies in communicating with investors about opportunities to finance ecotourism tourism developments. Mr David Leathem from Mount Alexander Shire Council commented on the role of Tourism Victoria in driving investment attraction and argued that:

Tourism Victoria was set up primarily as a marketing body, and I think the industry regionally would like to see Tourism Victoria being more than just a marketing body and looking more at industry development and investment attraction. We know they have all those arms, but the marketing focus has always been no. 1. 424

Other stakeholders have suggested that investors are confused about which government departments and agencies to contact for advice about investment opportunities. Mr Brett Cheatley, parks planning consultant, also commented that people frequently ask:

Where is the “go to” place for the private sector for investment in product development in nature-based tourism? Who do you go to? Do you go to Tourism Victoria? No. It is largely a marketing organisation. Do you go to Regional Development Victoria? You do, maybe, if you need a grant for something outside of the metropolitan area. Do you go to Parks Victoria? DEPI have sort of said to them, ‘You are not really into the tourism game anymore’. So who is the ‘go to’? I

Mr Ronan, operator of the Bothfeet walking lodge, argued that government needs to focus more strongly on tourism and its role in building the state’s economy – to ‘get tourism on the first page instead of the last page’.

The Committee heard evidence from Tourism Victoria relating to their investment attraction activities, which are conducted in partnership with the Department of State Development, Business and Innovation and Tourism Australia. Tourism Victoria works with investors ‘to assist in identifying the need, scale and location of tourism investment across Victoria’, and provides ‘assistance in navigating through the planning framework’. A key part of the organisation’s role is to conduct product gap analyses to assist investors to identify sites that both appeal to investors and will support the growth of the tourism sector. The agency’s investment activities have also included ‘various grants from the federal government to encourage firms to increase the quality of their accommodation’.

Mr Grant, Executive Officer of Geelong Otway Tourism, noted that the organisation has had a productive experience working with Tourism Victoria to attract investment to the region. Mr Grant stated that a number of ‘critical game-changer projects’ for the Great Ocean Road region ‘are now being worked through Austrade, Tourism Australia, the investment section of Tourism Victoria and Regional Development Victoria’. Mr Grant argued that by working together these government agencies can provide a ‘critical content for anyone, whether you are in Shanghai or Geelong, looking at a project that provides a framework from which you can commence the investment decision process’.

The Committee acknowledges that some tourism regions have been proactive at working with industry stakeholders to identify sites for appropriate development. The Great Ocean Road and the Grampians are two regions that have, on a local government and community level, undertaken a master planning process to guide tourism development and investment in their areas. Mr Flamsteed from Grampians Tourism explained the process of meeting with government and industry stakeholders and building agreement about sites for potential development as part of the Grampians Peaks Trail:

In accordance with the VCEC recommendations and the opportunities of investment into Crown land, there have been a number of sites along the trail that

---

425 Mr B Cheatley, Consultant, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 275.
426 Mr G Ronan, Owner, Bothfeet Walking Lodge, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 67.
428 Mr J Dalton, Acting Chief Executive, Tourism Victoria, Environment and Natural Resources Committee public hearing – Melbourne, 7 November 2013, transcript of evidence, p. 92.
429 Mr R Grant, Executive Officer, Geelong Otway Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 56.
430 Ibid., p. 56.
have been identified for possible private investment opportunities. This is all built into the draft Grampians Peaks Trail master plan that was driven by the Grampians Peaks Trail task force, which is a collective of regional stakeholders that includes local governments, CEOs, Regional Development Victoria, tourism, Parks Victoria and the tourism industry, and it is chaired by the Grampians Tourism Board. This is the first time this sort of project has been done in this way, and it is proving to have great results, because it takes the onus away from the land manager to provide the bricks and mortar, and it puts it in the hands of the community and industry that are actually going to grow and benefit and become sustainable from this project, and that will allow them to step outside the confines of state government so they can encourage more private investment opportunities.  

Corangamite Shire Council have undertaken a similar process in developing the Shipwreck Coast Master Plan with Parks Victoria and local industry stakeholders, with a view to identifying suitable areas for the development of accommodation and other visitor amenities. The Committee acknowledges that many of the best practice ecotourism developments in other jurisdictions, including eco-huts in Tasmania, Western Australia and New Zealand, have been funded by private capital. As noted previously, the Committee is of the view that the growth of the ecotourism sector depends on a partnership approach between government and the private sector, with RTBs playing a key role in identifying regional priorities.

Moreover, the Committee believes that Tourism Victoria, drawing on their investment attraction expertise, should be more centrally involved in guiding the development of the ecotourism sector. While it is appropriate that Parks Victoria plays a collaborative, lead role in managing commercial development in national parks, including the expression of interest process, Tourism Victoria should act as a primary contact for investors seeking to enter the ecotourism sector. Accordingly the Committee recommends that:

**RECOMMENDATION 4.7**

Tourism Victoria, in conjunction with the Regional Tourism Boards and the Victoria Tourism Industry Council, develops an investment attraction initiative to support the ecotourism sector. The program will assist investors interested in financing ecotourism developments throughout Victoria and, where appropriate, guide investors towards Parks Victoria’s expression of interest process for development in national parks.

4.4.2. Revised fees for accommodation in Victorian parks

A revised fee structure for accommodation in Victorian parks was introduced on 1 July 2014. Fees already applied for camping and hut accommodation in a number of Victorian parks, including the

---

431 Mr W Flamsteed, Chief Executive Officer, Grampians Tourism, Environment and Natural Resources Committee public hearing – Halls Gap, 18 March 2014, transcript of evidence, p. 316.
iconic Grampians National Park, Great Otway National Park, Cape Conran Coastal Park and Wilsons Promontory National Park. Fees have been newly introduced to a range of parks, such as the Mornington Peninsula National Park, Bunyip State Park and Baw Baw National Park. The fees now cover 195 out of 680 campsites. The fees are designed to cover the cost of maintaining campsites and accommodation huts, as well as toilets, shelters, barbecues, car parks, walking tracks, water and electricity supply, access roads and information centres. Victoria does not currently have fees for general entry to parks.

4.4.3. Funding iconic walking tracks

As discussed above, the Committee heard evidence relating to the Overland Track fee introduced by the Tasmanian Parks and Wildlife Service to fund track management and maintenance works. The $200 walkers’ fee was introduced in response to the increased popularity of the Overland Track and associated degradation and maintenance costs; in the mid-2000s the Track was described as being ‘loved to death’. As Mr Lennox, Director of Visitor Services for the Tasmanian Parks and Wildlife Service, explained at the public hearing in Hobart, the Parks Service made a number of changes to managing the Track:

The initial changes that we made in 2004 and 2005 at the direction of government, quite clearly, were the introduction of a fee, the introduction of a booking system and the introduction of a booking period, a season, which initially was six months and now it is eight months, and then during that peak season the fact that you can only walk in one direction on the Overland Track and that is north-south.

Mr Lennox argued that the experience of walking the Track has improved markedly as a result of these management changes. In relation to visitor surveys, Mr Lennox noted that previously:

27 per cent of people thought it was one of the best things they had done in their life. That is now in excess of 43 per cent. In terms of the experience that we are trying to offer people on the Overland Track that has substantially improved. Nine out of 10 people on the Overland Track say it is one of the best things they have done in their life, or one of the best things they have done in the last 12 months.

In addition to the Overland Track fee, all visitors to Cradle Mountain-Lake St Clair National Park are required to pay the standard entry fee for Tasmanian national parks. Park passes start at a daily rate of $12 for individuals without a vehicle and $24 for a vehicle with up to eight people. An

---


435 Mr S Lennox, Director Visitor Services, Tasmanian Parks and Wildlife Services, Environment and Natural Resources Committee public hearing – Hobart, 13 February 2014, transcript of evidence, p. 223.

436 Ibid., p. 224.
eight week ‘holiday’ pass that allows entry at multiple parks costs $60 for vehicles and $30 for individuals. Annual and two year park passes are also available.437

Mr Lennox described the business model used by the Tasmanian Parks and Wildlife Service as one involving a high level of self-generated income, with over 20 per cent of all income now generated from a range of business and commercial arrangements. Of this income, the parks entry fee system generates about 40 per cent of the total. The Service also has 21 business enterprises that it manages across the state, and partnerships with approximately 200 private businesses, comprising commercial visitor service licences and leases. Of these 200 businesses approximately 160 are made up of licensed tour operators, and the other 40 are leases, the bulk of which are for accommodation. The Service hypothecates its income derived from the parks entry system, businesses enterprises and permits, to the individual parks from which they are generated – however, Mr Lennox stated that only the Overland Track was fully supported by its own generated income.438 A similar model of hypothecation applies to the Naturebank system in Western Australia.

The Committee notes that the creation of world class walking tracks — like the Overland Track in Tasmania and the Routeburn and Milford Tracks in New Zealand — requires significant investment in infrastructure and ongoing staffing to ensure that the quality of the experience for visitors is maintained. The Committee is of the view that income that is generated by national parks from camping fees, accommodation and commercial leases be retained by the parks system. The Committee also believes that the Victorian Government should consider the introduction of walkers’ fees in order to fund the construction and maintenance of iconic walking tracks within the state’s national parks. These fees will be hypothecated to fund individual tracks, similar to the model used by the Tasmanian Parks and Wildlife Service to support the Overland Track.

Accordingly, the Committee recommends that:

RECOMMENDATION 4.8

The Victorian Government will ensure that the income derived from camping fees, parks, accommodation and commercial leases is hypothecated to the parks system.

- The Victorian Government explore the introduction of walkers’ fees to fund the construction and maintenance of iconic walking tracks within the state’s national parks. These fees will be hypothecated to fund individual tracks.

4.5 Ecotourism policy

The Committee heard evidence in relation to ecotourism policies and strategies in place in other jurisdictions. The most explicit of these in the Australian context is Queensland’s recently released ecotourism policy. In 2013 the Queensland Government released its *Queensland Ecotourism Plan 2013-2020*. The Plan has five strategic priorities, which are; delivering world-class experiences, facilitating best practice and innovation, raising the profile of Queensland’s ecotourism experiences, fostering thriving operators, and embracing a partnership approach between the tourism industry, government, community and Traditional Owners.\(^{439}\) The Plan defines ecotourism in the following way:

Ecotourism encompasses a broad spectrum of environmentally responsible, nature-based activities that go beyond the sustainable operation of a tourism business or one that offers experiences in a natural environment. Ecotourism is an experience that increases visitor appreciation and understanding of natural and cultural heritage values. It engages and informs visitors and is managed to be ecologically, economically and socially sustainable by contributing to the wellbeing of the natural areas and local communities where they operate.\(^{440}\)

The Plan aims to provide all stakeholders with a clear direction on how to grow the industry and become a world leader in ecotourism, and to increase tourism visitation and expenditure by concentrating on developing innovative ecotourism experiences. It identifies global megatrends impacting the tourism industry over coming decades.\(^{441}\) The Queensland Government aims to grow visitor expenditure to $30 billion by 2020. The Plan recognises that Queensland’s natural environment is the foundation of the state’s tourism industry. The DestinationQ Partnership Agreement – between Queensland Government and the Queensland Tourism Industry Council – identified the demand for new, unique and low-impact ecotourism facilities to attract visitors.\(^{442}\) Queensland has had previous ecotourism plans, spanning 1997-2000 and 2003-2008 and has a long-term interest in growing best practice. The Plan sees national parks as iconic and central to its ecotourism vision for the state.

The Queensland Government has amended the *Nature Conservation Act 1992* to increase access to protected areas, and broaden the possibilities for sustainable commercial development on public lands. The government has also developed best practice ecotourism development guidelines, and released the Queensland Eco and Sustainable Tourism (QuEST) policy, which regulates commercial use of natural areas and prioritises eco certification.\(^{443}\) The Plan contains a


\(^{440}\) Ibid., p. 6.

\(^{441}\) Ibid., p. 6.

\(^{442}\) Ibid., p. 5.

\(^{443}\) Ibid., p. 5.
three-year action plan, with identified actions to be undertaken, and the agencies responsible for implementation.\footnote{Ibid., pp. 17-20.}

While not explicitly titled an ecotourism policy, the Western Australian Naturebank program does address ecotourism issues and values. In 2006 the Western Australian Department of Environment and Conservation and Tourism WA undertook a review of nature-based tourism within the state. The review focused on integrating tourism and conservation goals and building relationships between government, industry stakeholders and investors.\footnote{Tourism Western Australia, \textit{Review of Nature-Based Tourism}, Department of Environment and Conservation, Government of Western Australia, 2011, p. 2.} The review emphasised the importance of setting measurable environmental outcomes for developments within parks and compulsory sustainable tourism accreditation for all operators.\footnote{Ibid., p. 5.} In addition, Tourism WA introduced the requirement for all operators involved in its promotional activities to have eco-accreditation.\footnote{Ibid., p. 5.} The key outcome of the review was the Naturebank program, launched in 2009, and which was described earlier in this chapter. The program ‘involves the assessment and release of ‘investor-ready’ land for low-impact visitor accommodation predominately within Western Australia’s protected areas’.\footnote{Ibid., p. 4.} Naturebank has developed a structure for eliciting the participation of investors in building eco-accommodation within the state’s national parks, and has developed a series of prospectuses for particular parks including, Francois Peron National Park, Cape Le Grand National Park and Windjana Gorge National Park.\footnote{Tourism Western Australia, ‘Naturebank development sites’, Tourism Western Australia, accessed 16 June 2014; www.tourism.wa.gov.au/Infrastructure_and_Investment/Current_Tourism_Development_Opportunities/Naturebank_Program/Pages/Naturebank_Development_Sites.aspx.} The aim is to provide world-class visitor services and accommodation, while protecting Aboriginal heritage and adhering to strict environmental standards.

The promotion of Tasmania has long focused on the state’s natural assets and as a result the concepts of ‘green’ and sustainable tourism are well-established within the tourism sector. The Tasmanian Government ran a nature-based tourism program during the 2000s that focused on improving visitor facilities — including campgrounds and interpretation centres — and access at key national parks. It also supported the development of new walking tracks.\footnote{Ibid., p. 4.} The state does not currently have a formal nature-based tourism policy. There is however a focus on operators within national parks participating in the Australian Tourism Accreditation Program, although this does not have a specific eco focus. In the mid-1980s the Tasmanian Government opened an expression of interest process for commercial investment in accommodation within Cradle Mountain-Lake St Clair National Park, which resulted in the construction of private walking huts and an accompanying guided walking tour experience, as described above. Since then accommodation has been developed adjacent to Mount William National Park near the Bay of Fires and a lodge has been built within Freycinet National Park.

\footnote{Ibid., pp. 17-20.}
\footnote{Tourism Western Australia, \textit{Review of Nature-Based Tourism}, Department of Environment and Conservation, Government of Western Australia, 2011, p. 2.}
\footnote{Ibid., p. 5.}
\footnote{Ibid., p. 5.}
\footnote{Ibid., p. 4.}
\footnote{Tourism Western Australia, ‘Naturebank development sites’, Tourism Western Australia, accessed 16 June 2014; www.tourism.wa.gov.au/Infrastructure_and_Investment/Current_Tourism_Development_Opportunities/Naturebank_Program/Pages/Naturebank_Development_Sites.aspx.}
While these developments are widely considered to represent best practice in eco-accommodation, there is, however, minimal commercial development in other Tasmanian parks. The newly elected Tasmanian Government has a policy of ‘unlocking the potential in our parks’, with the aim of introducing an expression of interest process to support the development of ‘sensible, low-impact eco-tourism experiences and associated infrastructure’ within national parks.\(^{451}\)

Tourism policy in New South Wales is guided by the recently established Visitor Economy Industry Action Plan, which was released in 2012, in response to the final report of the Visitor Economy Taskforce. This Plan is a broad based industry reform package, designed to enable a whole-of-government approach to tourism and collaboration with the industry.\(^{452}\) New South Wales also has an *Aboriginal Tourism Action Plan 2013 – 2016*, and a *China Tourism Strategy 2012-20*, but not a dedicated ecotourism strategy. South Australia is in the process of developing a new general tourism plan for 2015-2020, to be released this year, but does not possess a specific ecotourism strategy.\(^{453}\)

New Zealand launched a tourism policy document in 2007, titled *New Zealand Tourism Strategy 2015*, in which the indigenous Māori principles of kaitiakitanga (guardianship) and manaakitanga (hospitality) are the basis for the New Zealand approach to sustainability.\(^{454}\) The strategy views sustainability as reaching across all areas — environmental, economic, social, and cultural, with tourism relying more than any other sector on the continuing sustainability of the country. The strategy states:

> Visitors see their experience as a whole, not as component parts. There is no point in providing comprehensive recycling facilities if our communities are unwelcoming, or delivering exemplary service if our streams are polluted. We need to make a greater commitment to using our resources more sustainably in order to protect both our environment and our economic potential. Sustainable products and services are in growing demand globally. We already have a reputation for being ‘clean and green’. This has been reinforced by Tourism New Zealand’s 100% Pure New Zealand campaign. Managing our reputation and delivering true sustainability will create opportunities that will benefit all New Zealand businesses, including those in tourism.\(^{455}\)

Tourism in British Columbia is promoted by the branding strategy ‘Super, Natural British Columbia’, which highlights natural beauty as the province’s key attraction. Nature-based and adventure tourism are fundamental to the tourism industry in British Columbia and the province

---


\(^{455}\) Ibid., p. 10.
has a strong interest in sustainability across all its programs. British Columbia has a broad based provincial tourism strategy, but does not have a separate ecotourism or nature-based tourism policy. Tourism in Hawaii is managed by the Hawaiian Tourism Authority, the lead government agency for tourism policy and marketing. While there is an increasing awareness of the need to encourage the responsible use of natural resources, the state does not have a nature-based or ecotourism policy. California possesses Green Business schemes, which include tourist ventures, but does not have an ecotourism policy framework.

As mentioned above, the previous Victorian government had, in its 2006 *10 Year Tourism and Events Industry Strategy*, foregrounded the development internationally of a convergence between tourism and environmental sustainability, noting best practice sustainability models for ecotourism commercial development in national parks in other jurisdictions, such as the United States, New Zealand and Canada. One of the products of this strategy was the development of the recently expired *Victoria’s Nature-Based Tourism Strategy 2008-2012*, which was the state’s first strategy to focus on nature-based tourism. The policy aimed to provide a coordinated, long-term approach to the sector that involved Tourism Victoria, Parks Victoria and the then Department of Sustainability and Environment. As mentioned in Chapter One, the strategy had as its vision that Victoria would be recognised as the leading sustainable nature-based tourism destination in Australia. A key focus of the policy was to attract high yield visitors to Victoria by providing a range of engaging nature-based tourism experiences, including in the state’s major national parks. The strategy pursued five strategic directions: Creating supportive frameworks and partnerships; planning and managing sustainable destinations; developing authentic, memorable experiences; facilitating viable and innovative businesses; and, effectively marketing.

A number of regional areas were identified to be the focus of a destination planning approach that would prioritise cooperation between local stakeholders and overcome barriers to investment and development, including the Great Ocean Road, Grampians, Phillip Island, Gippsland and the High Country. The strategy also identified a number of gaps in the nature-based tourism sector, such as adequate accommodation, appropriate visitor amenities and interpretation centres. The policy did suggest lengthening commercial leases on public lands and extending the length of operator licenses, although it did not recommend commercial development in national parks. The policy focused on encouraging the growth of sustainable tourism operations, following a triple-bottom-line approach to ‘minimise potential negative impacts and maximise nature-based tourism’s conservation of natural and cultural heritage, contribute to regional economies and improve the quality of life for local communities and

---

458 Ibid., p. 7.
459 Ibid., p. 5.
460 Ibid., p. 7.
461 Ibid., p. 7.
462 Ibid., p. 36.
463 Ibid., p. 7.
The strategy developed incentives and encouraged businesses to participate in accreditation schemes that promoted sustainability, such as those offered by Ecotourism Australia. It is important to reiterate that the 2020 Strategy policy states that the Victorian Government is ‘committed to further developing nature-based tourism’, particularly through the development of a dedicated trails policy and by supporting private sector investment in national parks.

Mr Hillman, Chief Executive of Ecotourism Australia, told the ENRC inquiry that Victoria has the opportunity to position itself as a leader in ecotourism. However, Mr Hillman stressed that industry requires certainty and that currently Victoria was without a strategic plan in this area. He described the previous Victoria’s Nature-Based Tourism Strategy 2008–2012 as a clear plan the aim of which ‘was for Victoria to be recognised as the leading sustainable, nature-based tourism destination in Australia, renowned for its diverse and accessible natural attractions. This is an effective plan that provides a clear direction to the industry, with an action plan and policy directives’. Mr Hillman urged Victoria to develop an appropriate policy framework for ecotourism, saying that ‘as not having a current plan or a process to develop a new plan for the future of ecotourism in Australia is a huge wasted opportunity’. He pointed to the fact that Queensland now has an ecotourism plan which has very similar aims to Victoria’s previous nature-based strategy. He concluded by saying that:

I would strongly recommend that Victoria reactivates its own nature-based or ecotourism plan and builds on the excellent work done in the last four years. Without a plan it is unlikely Victoria will reap the benefits that the most reliable agents in Australia and the world are predicting. Ecotourism by its very nature promotes investment and job creation to regional areas. It builds the destination’s profile, pride and identity, as demonstrated by the National Landscapes program, and brings support to the state’s protected areas, as ecotourism operators are bound by their ethics to contribute to the conservation and community within the area.

In giving evidence to the inquiry, the Chief Executive of the Victoria Tourism Industry Council (VTIC), Ms Smith, referred to the former Victoria’s Nature Based Tourism Strategy 2008–2012, describing it as an initiative that had assisted in lifting the profile of nature-based and ecotourism in the state over the last five years. While VTIC makes it clear that it prefers the broader compass of the term ‘nature-based’ (to include ecotourism in its ambit), it is also clear from its submission that this strategy had high recognition and acceptance at industry representative level, and remains an important reference point. Likewise, the Executive Officer of Shipwreck
Coast Tourism, Ms Carole Reid, stated to the Committee that there have been improvements in the industry in recent years with less fragmentation, and more cooperation through VTIC, and that part of this was due to implementing strategies in the *Victoria’s Nature Based Tourism Strategy 2008–2012*. Ms Reid called for the remainder of the strategy’s elements to be implemented.472

By contrast, in its submission, the Heritage Council of Victoria endorsed a position in which tourism policy for Victoria would combine ecotourism and cultural heritage tourism offerings in ways that would consolidate or develop existing tourism products; new tourism strategies could act as drivers of regional development.473 The potential to integrate ecotourism and heritage tourism is discussed in Chapter Seven.

In its submission to the inquiry, the Department of Environment and Primary Industries (DEPI) stated that DEPI had played a key role in the implementation of policy directions identified in nature-based tourism strategies, such as the *Victoria’s Nature Based Tourism Strategy 2008–2012*.474 The submission went on to state that DEPI developed the *Tourism Opportunities of Significance in National Parks Guidelines* on behalf of the government, and that these guidelines are part of a broader policy framework for the management of public land. The government’s *Environmental Partnerships* statement is built on three aspirations that, according to DEPI, will ‘also help ensure the healthy environment essential for ecotourism’.475 Those aspirations are: Value the environment and what it has to offer; act to protect, conserve and maintain the environment; and, enjoy the wide range of benefits of a healthy environment now and into the future.

The Committee believes that Victoria is well placed to develop a viable and productive ecotourism sector, and notes that there is a trend emerging in some other jurisdictions to create a policy or strategy framework to guide and underpin that development. The Committee notes that best practices in ecotourism are not necessarily dependent on an explicit ecotourism strategy being formulated into policy, as the Tasmanian example shows. Nonetheless, a policy framework that has the agreement and ‘buy-in’ of stakeholders, government and industry does provide a platform for engagement, change and development across the state in a coherent fashion. Victoria’s previous nature-based strategy did have the support of industry, and did provide a clear set of goals for implementation, ones that were gradually being worked through by agencies and industry.

Throughout this inquiry the terms ecotourism and nature-based tourism have been used by contributors with a variety of meanings. At the outset of this report the Committee stated that it viewed both terms as valuable. To reiterate, the Committee appreciates that ecotourism is most often defined as a niche category within the tourism industry and is strongly associated with

---

472 Ms C Reid, Executive Officer, Shipwreck Coast Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 78.
473 Heritage Council of Victoria, submission no. 16, p. 5.
474 Department of Environment and Primary Industries, submission no. 80, pp. 1-2.
475 Ibid., p. 2.
accredited sustainability practices, and as such, can be reasonably viewed as a sub-sector of the nature-based tourism industry. The Committee is keen for this sub-sector to be fully developed in the state, and to see the sustainability practices that underpin ecotourism to influence and flow through to other elements of the nature-based tourism sector.

The Committee regards the development of a stand-alone ecotourism strategy as one potential direction that could be taken by government; a direction that would emulate the recent work conducted in Queensland. However, on balance, and given the policy history in this area in Victoria, it is likely that the sector would be better supported by a renewed nature-based tourism strategy. A renewed strategy would contain a clearly articulated strategy for the ecotourism sector in Victoria, as part of a broader strategy underpinned by principles of sustainability. It could address many of the issues contained in the text and recommendations of this report, including eco-accreditation, sustainable commercial development, regional dispersal, iconic walks development and so on. The Committee does believe that the implementation of best practices in ecotourism will be enhanced by the existence of a strategy of this kind; one which will provide the state’s stakeholders with a clearly defined set of aspirations, goals and directions, associated with specific actions, timeframes, and implementing agencies. Accordingly the Committee recommends that:

RECOMMENDATION 4.9
The Victorian Government renew its approach to nature-based tourism by developing a long-term nature-based tourism strategy for Victoria that specifically addresses and emphasises the development of the state’s ecotourism sector, underpinned by the principles of sustainability.
Chapter Five

Best practice in heritage tourism

This chapter focuses on term of reference two, ‘examining best practice in ecotourism and heritage tourism’. The Committee found that heritage tourism is a broad sector that includes a range of operators, sites and activities, such as historic house museums, community museums, historical societies and preservationist groups, heritage railways, walking tours, historical ruins, and natural heritage sites. Victoria’s heritage themes are also diverse, encompassing Indigenous cultures, pioneering settlements, the gold rush, experiences of migration and maritime and military histories. Heritage tourism provides visitors with experiences that link them to significant places and sites, often through an emphasis on storytelling. As such, interpreting the past — through signage, guided tours or interactive digital displays — is central to heritage tourism.

Heritage tourism is managed by Victorian Government policy as part of the wider cultural tourism sector. Despite this, the majority of the Committee’s stakeholders understand heritage tourism as relating to historic places and objects, rather than to artistic displays or cultural performances. This chapter suggests that the Victorian Government’s cultural tourism strategy requires renewal, and should include a stronger focus on heritage tourism. Moreover, the Committee recommends strengthening the relationship between Tourism Victoria and Heritage Victoria in order to integrate the government’s approach to heritage tourism and provide guidance to heritage operators seeking to improve their visitor experience.

In terms of achieving best practice, the overwhelming majority of witnesses pointed to emerging digital technologies as key to improving the experience of heritage sites for visitors. For some operators, this has involved developing smart phone apps to deliver information, for others it has meant creating multilingual signage featuring QR (Quick Response) codes. The quality of tour guides is also important for best practice, as guides are a vehicle for delivering engaging heritage stories to visitors. The Committee heard that the heritage tourism workforce is dominated by volunteers who would benefit from training to develop skills in conservation, site management and visitor engagement.

The Committee heard that heritage tourism often relates to the built environment, and as a result many operators face the challenge of conducting tourist activities in historic buildings and vehicles that require significant conservation. International best practice supports the adaptive re-use of heritage structures, especially for tourism purposes. Importantly, there are examples of international jurisdictions, such as the United Kingdom, that actively encourage heritage tourism by providing dedicated funding for heritage preservation works.

The Committee believes in strengthening the relationship between ecotourism and heritage tourism, and discusses the need for a more integrated approach to tourism in Chapter Seven.
5.1 Heritage tourism within the cultural tourism sector

Heritage tourism is managed by the Victorian Government through *Victoria’s Arts, Theatre and Cultural Heritage Tourism Action Plan 2010-2014*. The policy understands heritage tourism as part of the broad category of ‘cultural tourism’, which covers arts and cultural events, theatre and other performances, museums and art galleries, and visiting heritage buildings. Cultural tourism is considered central to the promotion of Victoria as ‘Australia’s leading cultural destination’ and the presentation of Melbourne as ‘a stylish, sophisticated, romantic and creative city’. The policy highlights the importance of developing major cultural events and festivals; supporting the Southbank cultural precinct and Melbourne’s theatre district; and emphasises the role digital technologies can play in improving visitor experiences.

As discussed in Chapter One, most of the witnesses who contributed to the inquiry understand heritage tourism as relating to historic sites and places, rather than with theatre, art galleries or performances. While some representative organisations – such as Cultural Tourism Victoria and VTIC – do consider heritage tourism part of the broader cultural tourism sector, they nevertheless recognised the specificity of the heritage tourism sector. Both the Heritage Council of Victoria and the National Trust promote heritage tourism as concerned with providing visitors experiences associated with historic places and stories. The National Trust describes heritage tourism as including ‘visitation to places that have historic, Indigenous and natural values, their associated collections (including documentary collections), and the settings in which places are located’. The Heritage Council emphasises visitation to historic places and sites, and also highlights the value of historic streetscapes that provide a heritage ‘backdrop’ for tourism.

Heritage tourism is not a core focus of Tourism Victoria’s current cultural tourism action plan. As a result, the policy lacks clear direction on how heritage destinations and products should be developed to appeal to visitors. The policy also does not differentiate between the needs of the arts and theatre sectors and heritage-based tourism, nor does it prioritise cooperation between Tourism Victoria and Heritage Victoria. The Heritage Council of Victoria was particularly critical of this lack of relationship between Tourism Victoria and Heritage Victoria, arguing that ‘although the [cultural tourism] Plan lists Heritage Victoria as a partner, there was no developed partnership and Heritage Victoria is not included in any of the Plan’s Actions’. MELTours, a Melbourne-based heritage walking tour operator, also noted the lack of focus on heritage tourism in Tourism Victoria’s cultural tourism plan. In its submission MELTours pointed out that ‘there is no definition, explanation or action for the term ‘Heritage Tourism’’, and no mention of ‘strategies or improvements relating to Heritage Tourism’.

---

477 Ibid., p. 7.
478 Ibid. p.11; 22.
479 National Trust of Australia (Victoria), submission no. 70, p. 3.
481 Heritage Council of Victoria, submission 16(a), p. 2.
482 MELTours, submission no. 50, p. 4.
The Committee heard from a number of heritage operators that felt overlooked by the current cultural tourism policy. In particular, there are some groups — especially community museums and preservationist organisations — that feel unsure which government department to turn to for advice and assistance. Indeed, cultural tourism can involve a number of government agencies, such as Tourism Victoria, Arts Victoria, Parks Victoria, and Heritage Victoria. Ms Kathryn Mackenzie, Chair and President of the industry representative body Cultural Tourism Victoria, spoke to the frustration experienced by heritage tourism operators seeking to navigate the ‘maze’ of disparate government departments and agencies:

I suppose one of the greatest challenges for anybody who sits in this industry is really who you talk to and who are the funnels. It is really working your way through that maze. As I have been saying, I have been in tourism for 18 years, and one of the most asked questions from people on the ground is, ‘Who do we go to? Where do we go? What does each department do?’ I am quite sure that many of our departments across Victoria spend more time saying to requests coming through, ‘No, we do not do that. No, we do not handle that. No, that is not our role here’. It would just be fantastic if we could have a one-stop shop where we could go and be facilitated through all of the processes.483

Mr Mark Pilkington described the difficulties faced by the Australian Aircraft Restoration Group in seeking government support for their aviation heritage museum in Moorabbin, and their confusion about whether Arts Victoria or Heritage Victoria could assist. At a public hearing in Melbourne Mr Pilkington stated that:

At the Victorian state level, we find that if we knock on arts [for support], which is where most people expect to find museums — the state-owned museums are covered by arts — but the performing arts, the visual arts and art galleries consume the budget of the arts bureaucracy and its resources. We are just pushed aside and cannot get a look in. There are cultural institutions funded by Arts Victoria, but no small museums like us are considered to be cultural institutions. Yet cultural heritage is something that needs to be supported.

At the other end of the spectrum Heritage Victoria does take us under its wing, and there are some very small grants that Heritage Victoria makes available, but Heritage Victoria is largely coming out of the planning department and is focused on built heritage and preserving buildings. Movable cultural heritage and collections get a very small look in.484

In a similar way, Mr Adrian Ponton, Public Transport Victoria’s Registrar for Tourist and Heritage Railways noted that tourist railway groups often have difficulty engaging with Tourism Victoria as their product is considered a transport rather than a tourism issue. Accordingly, Mr Ponton argued that:

---

483 Ms K Mackenzie, Chair and President, Cultural Tourism Victoria, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 281.
484 M Pilkington, Vice-Chairman, Special Projects, Australian Aircraft Restoration Group, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 303.
Going forward there needs to be a greater recognition that they [tourist railways] are a tourism product, not a transport product, that there is a strong link to heritage, but also that they need greater or better access to strategic funding.485

Following this Mr Ponton noted that he has recently had some success in engaging Tourism Victoria to develop promotional materials about heritage railways.486

Heritage organisation Australia ICOMOS commented on the lack of integration between the tourism and heritage sectors, arguing that best practice in heritage tourism ‘draws from best practice in heritage interpretation, where the significant and unique values of a heritage site inform all visitor activities’.487 The organisation argued that ‘there is currently no formal relationship between the heritage sector and tourism industry. Development takes place on an ad hoc basis and frequently under the initiative of local tourism operators, many of whom have little or no training in heritage-related matters’.488 Moreover, the group recommends the creation of a Victorian heritage tourism strategy, which would augment the current Jigsaw framework and ‘outline heritage experiences based around themes for a town and/or region, including site-based heritage experiences’.489

Heritage Victoria is the state agency responsible for the identification and protection of Victoria’s non-Indigenous heritage. The agency is supported by the Heritage Council of Victoria, a ten-member statutory authority responsible for inscribing objects and places on the Victorian Heritage Register and advising the Minister for Planning on heritage issues. While both organisations do provide advice on heritage issues, neither has a mandate to support the heritage tourism sector as they are primarily occupied with activities to support heritage protection and preservation.490 Similarly, while heritage tourism is a focus of Tourism Victoria’s promotional campaigns and clearly a key attraction for visitors — especially in regional areas — the agency’s current policy framework treats heritage tourism as part of the broad and diverse cultural tourism sector.

Tourism Victoria’s cultural tourism policy is due to expire at the end of 2014. Accordingly, the Committee believes that Tourism Victoria has an opportunity to renew its cultural tourism policy with a stronger focus on heritage tourism, and to embark on a more integrated relationship with Heritage Victoria. The Committee is of the view that heritage tourism can only be effectively supported by a cooperative approach that considers heritage tourism within the context of both tourism and heritage perseveration and interpretation, an approach that necessarily draws on the expertise of the state’s tourism and heritage agencies.

486 Ibid., p. 165.
487 Australia ICOMOS, submission no. 40, p. 5.
488 Ibid., p. 5.
489 Ibid., p. 5.
As a result, the Committee recommends that:

**RECOMMENDATION 5.1**

Tourism Victoria renews its cultural tourism policy, in conjunction with Heritage Victoria and Arts Victoria, and includes within it a dedicated focus on the heritage tourism sector. The policy will develop a framework for cooperation between Tourism Victoria and Heritage Victoria designed to support heritage operators to deliver world class tourism experiences.

### 5.2 Interpreting heritage sites

Heritage tourism is fundamentally concerned with connecting visitors to the past in an engaging and interesting way. As such, the success of heritage tourism ventures often hinges on the ability of operators to provide an ‘authentic’ heritage experience accompanied by high-quality interpretive materials. Heritage can be interpreted in a range of ways: Through signage or exhibitions; storytelling by tour guides; as part of live performances; using audio guided tours; creative sound and light shows; and increasingly, through the use of apps for smartphones and tablets. The heritage sector comprises a diverse range of operators and, subsequently, understandings of best practice vary across the sector. For example, the interpretative methods and displays used in a community museum may not be suitable for a more mobile heritage experience like a walking tour, and would again differ from the approach used to explain cultural heritage within a national park or outdoor area. Despite this, heritage tourism operators are broadly united by a shared focus on using quality storytelling to engage tourists with aspects of the past.

Speaking generally about the expectations of heritage tourists, Ms Dianne Smith, Chief Executive of the industry body VTIC, argued that tourists seek an ‘authentic experience’. She argued further that heritage tourism ‘is about storytelling ... It is about the interpretation and that meaningful connection about what is the core essence of that place’. In a similar way Cultural Tourism Victoria argues that ‘heritage tourism is not simply a ‘building’ but should be more accurately defined as cultural heritage, requiring interpretation and activation, which provides opportunities to drive business and tourism’. The Heritage Council of Victoria also noted the importance of interpretation to the success of heritage tourism, arguing that ‘the successful sites rely strongly on presenting the stories of the people behind the places’.

In evidence to the Committee the National Trust emphasised the importance of relevant heritage interpretation to satisfying the interests of tourists. In this way, the organisation argued that:

---

492 Cultural Tourism Victoria, submission no. 65, p. 1.
493 Heritage Council of Victoria, submission no. 16(a), p. 3.
The existence of heritage, its protection and its connection with the community does not guarantee that it will attract tourists. A sanitised heritage presenting a safe interpretation of history and culture holds little appeal and will not generate interest amongst tourists. To have successful heritage tourism, it is necessary to rethink heritage and constantly adapt to the changing needs of the current and emerging tourism market.494

Here the National Trust draws attention to the difference between heritage conservation and heritage tourism; while heritage tourism often takes place in buildings requiring significant protection and maintenance, successful heritage tourism must do more than simply conserve a building — it must tell a story that is relevant to an audience. The National Trust noted that their properties offer a range of ‘heritage experiences’ for visitors, such as guided or self-guided tours; live performances; exhibitions; tailored ‘hands on’ events for children; demonstrations and talks; and events and festivals that celebrate the ‘ambience’ of the Trust’s heritage places.495 In response to the decline of the house museum market in the 1990s, the National Trust has increasingly sought to run special events and exhibitions in its historic houses to meet the changing interests and expectations of visitors.496

The Nationals Trust approach aligns with what Australia ICOMOS describes as international best practice: an ‘experience-based model’ of heritage tourism which incorporates engagement with a heritage site and ‘non-site based heritage ‘experiences’ ... ranging from heritage-themed walks, tours and drives to events, art, food and beverage activities, retail, theatre and education’.497 The Committee heard from a number of other operators offering similar experiences, including Sovereign Hill’s open-air museum and Flagstaff Hill Maritime Village, both of which use sound and lights shows to bring the past ‘alive’ for visitors. Some stakeholders explained that given the variety of operators working within the heritage sector, it is difficult to ensure that the quality of information and interpretation provided by operators is accurate and engaging. Mr Roger Grant from Geelong Otway Tourism indicated that his organisation conducted a survey of visitors to investigate the quality of their experience. He stated that:

> It does worry me when you listen to some of the information delivered by tour operators. It starts to move from fact to fantasy and from education to entertainment. At the end of the day, I am not talking about the delivery of dry academic information, but it does need to have credibility and relevance to the particular destination.498

Tourism North East also noted the importance of quality interpretation in building an engaging heritage experience. A product gap analysis of the North East found that visitors have a ‘high expectation of what the region will deliver in terms of cultural heritage based tourism

494 National Trust of Australia (Victoria), submission no. 70, p. 11.
495 Ibid., p. 6.
496 Ibid., p. 5.
497 Australia ICOMOS, submission no. 40, p. 2.
498 Mr R Grant, Executive Officer, Geelong Otway Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 54.
experiences but are currently disappointed with the offering’. The organisation’s research also found that heritage tourism ‘experiences must be immersive, memorable and experiential’. Australia ICOMOS emphasised the importance of developing the heritage knowledge of an entire community to support heritage tourism ventures by creating a ‘seamless’ experience for the visitors. In reference to the success of the Cornwall UNESCO World Heritage Area in the UK, Ms Lisa Gervasoni, Australia ICOMOS Committee member noted that:

“They have actually worked with the local tourism industry to make sure that there is a quality product. They actually run days for tourism operators, so they understand those heritage values. So when you are staying at a bed and breakfast or buying a pint at the local pub, if you ask a question, the people who you are dealing with can answer it quite well. It therefore provides quite a seamless level of interpretation.”

Mr Terry Robinson from Destination Gippsland also highlighted the importance of educating the wider community about the heritage significance of a particular area. ‘People are not necessarily aware’, he argued:

“Of what went on in that area hundreds, if not thousands, of years ago. It is an education process for the visitor but also for communities to really understand what their points of difference are and what their strengths are, and then how to build on that. How do you build momentum either in product or interpretation or tour guiding or whatever it might be to bring that element out?”

The Victorian Goldfields Tourism Executive is an example of a regional body working with local stakeholders to develop a strategic plan for heritage tourism that emphasises the importance of the community understanding and telling its heritage story. The Executive’s aim is that ‘the region will be rich in well-preserved heritage assets that are used and presented in interesting, sustainable and respectful ways that celebrate the unique role of the goldfields in Australia’s cultural identity’.

5.2.1 Digital technologies

The Committee has heard that increasingly best practice in heritage tourism includes the use of new digital technologies to enhance the interpretation of sites. New technologies — such as smartphone applications (apps) and QR codes — can be used to enhance the experience of visiting heritage sites by providing information, audio-visual interpretation, suggesting walking tours or itineraries, and in some cases by allowing visitors to upload their own photos and comments about their experiences. Use of apps and QR codes requires Wi-Fi internet access.

---

501 Ms L Gervasoni, Victorian Committee Member, Australia ICOMOS, Environment and Natural Resources Committee public hearing – Melbourne, 25 November 2013, transcript of evidence, p. 158.
502 Mr T Robinson, Chief Executive Officer, Destination Gippsland, Environment and Natural Resources Committee public hearing – Lakes Entrance, 5 December 2013, transcript of evidence, p. 206.
503 Victorian Goldfields Tourism Executive, submission no. 63, p. 7.
which, as discussed in Chapter Three, can be intermittent or unavailable in some areas of regional Victoria. A range of stakeholders argued that the quality of visitor experiences at heritage sites can be improved significantly though the use of digital technologies for storytelling and interpretation. Australia ICOMOS identified new technology as a key method for creating engaging interpretive experiences that move beyond traditional signage. The organisation argued that:

Digital media, including Near Field Communication, and offsite delivery of interpretation in the forms of websites, Apps and print publications, offer real opportunities to protect sites as well as to deliver high-level tourism experiences. Both the heritage and tourism industries need to move beyond the de facto assumptions that Victorian heritage should be delivered only through signage, exhibitions and themed Visitor Information Centres. These forms of built interpretation have their role, but the best interpretation will leave the visitor eager to know more. 504

Mr David Leathem, Economic Development and Tourism Manager at Mount Alexander Shire Council, also recognised the potential use of new technology, describing it as a key ‘challenge’ for the sector:

I think the challenge with heritage tourism is that it is about how you interpret it and how you use technology in the way you do it so that it brings the experience alive and tells the story and gives the visitor a great experience. 505

Mr Peter Abbot from Warrnambool’s Flagstaff Hill Maritime Museum argued that developing technology for heritage interpretation is important in meeting the increased expectations of visitors. Mr Abbott noted that:

The way people experience or get information interpreted to them is completely changed, and we need to keep pace with those interpretive methods, whether it be online or through mobile tours. 506

Further, he argued that adding an online component to existing heritage trails can encourage visitors to stay longer in a particular area, and discussed adding an online component to the existing Shipwreck Discovery Trail:

To draw people along the Great Ocean Road, have them stop at probably the more spectacular sights along the Great Ocean Road to not only enjoy the scenery but get a bit of the history and the heritage of some of the incidents that happened in those shipwrecks along the coast and of course draw them along the road to Warrnambool and to Flagstaff Hill. 507

504 Australia ICOMOS, submission no. 40, p. 5.
505 Mr D Leathem, Manager, Economic Development and Tourism, Mount Alexander Shire Council, Environment and Natural Resources Committee public hearing – Ballarat, 8 October 2013, transcript of evidence, p. 15.
506 Mr P Abbott, Manager, Tourism Services, Flagstaff Hill Maritime Village/Warrnambool City Council, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, pp. 70-71.
507 Ibid., pp. 70-71.
The Committee also heard about plans to increase the use of digital technology along the Great Ocean Road. At the public hearing in Port Campbell, Mr Roger Grant from Geelong Otway Tourism described plans to augment traditional signage with Wi-Fi hot spots:

One of the projects we are looking at on the Great Ocean Road is the development of a series of Wi-Fi hot spots right along the Great Ocean Road, so that the visitor will be able to stop at places and download detailed information about that specific site, which may even include historic augmentation. You might be able to hold up your iPhone or iPad, look at the Twelve Apostles and then actually have a look at what they look like and how they were developed.508

The National Trust has been particularly active in embracing the use of digital technologies and has released a number of smartphone apps about Melbourne’s heritage buildings. The Lost! Melbourne’s Lost 100 is an app that ‘uses augmented reality to allow the user a 3D understanding of the now lost city of Melbourne’.509 The app uses the camera function of a smartphone to superimpose images of older, ‘lost’ buildings — such as markets, mansions, hotels, pubs and shops — over Melbourne’s current streetscape. The app then allows users to save images to their phone and share them via email or social media.510 Our City is another National Trust app that guides users on a walking tour of Melbourne that features the stories of prominent Melburnians like Mirka Mora, Barry Jones, Tim Costello and Ron Barassi. Below is an image from the Lost! Melbourne’s Lost 100 app.

Figure 5.1: Melbourne’s Lost 100 App

Source: National Trust of Australia (Victoria) 511

---

508 R Grant, Executive Officer, Geelong Otway Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, pp. 54-55.
509 National Trust of Australia (Victoria), submission no. 70, p. 9.
510 Ibid., p. 9.
Below is an image from Heritage Victoria’s ‘Vic Heritage’ app, and an image of a QR code at the Australian Museum in Sydney.

Figure 5.2: Heritage Victoria ‘Vic Heritage’ app and QR code at the Australian Museum, Sydney.

Heritage Victoria has also released an award-winning mobile app that allows users to find information about sites listed on the Victorian Heritage Register. The app features a ‘near me’ function that highlights sites close to the user’s current location and includes suggested walking tours. The app is not specifically geared towards tourists, but to anyone wishing to find out about the state’s heritage-listed buildings. Mr Ian Wight, representative for Australia ICOMOS discussed the potential for developing the app to be a state-wide heritage tourism resource that includes heritage places that are not listed on the register:

> The base data exists in Victoria to make that applicable right across the state for all the heritage of local significance. Imagine if you drove into a country town, you could pick up your iPhone or your Smartphone, press the button and walk down the street and know all about that town. It would be fantastic.514

The Heritage Council noted that there is potential to expand the app to have a stronger tourism focus, but noted that the agency ‘has never been adequately resourced to enable interpretation and storytelling about all the places that will more fully enhance this resource’.515

---


514 Mr I Wight, Victorian representative, Australia ICOMOS, Environment and Natural Resources Committee public hearing – Melbourne, 25 November 2013, transcript of evidence, p. 158.

515 Heritage Council of Victoria, submission no. 16(a), pp. 2-3.
The Committee heard from a range of stakeholders about the potential for QR codes to be used to enhance heritage tourism experiences. QR codes are barcodes that when scanned by smartphones lead users to websites. Mr Richard Ponsford, Executive Officer of Western Melbourne Tourism Inc., was positive about the role QR codes can play, explaining that:

I have been involved in working in museums and I have seen the power of a QR code: you can scan a QR code and play a bit of video footage that actually takes you back to that particular place in all different time sequences, which is quite exciting.\(^{516}\)

QR codes can also be used to provide multilingual material so that as many visitors as possible can access information about a heritage site in their own language. At a public hearing in Hobart, Mr Stuart Lennox, Director of Visitor Services for the Tasmanian Parks and Wildlife Service, described how QR codes are being installed in a number of iconic national parks to assist visitors. Mr Lennox explained how the codes will enhance the visitor experience, noting that:

We are about to put out signage at a number of locations in five Asian languages with QR codes. Basically, at Cradle, Freycinet, Mount Field and Narawntapu, those four sites which we think are the main sites that we do get Chinese, Japanese, Malaysian, we are now having a welcome sign in their language with a QR code, and a QR code when they scan — because they are obviously very technology savvy — will take them to the park brochure which is a general park information brochure.\(^{517}\)

On its North American study tour, the Committee met with the heritage advocacy organisation San Francisco Architectural Heritage, which is developing online content to supplement its work in promoting the city’s architectural and intangible heritage. The group has collaborated with particular neighbourhoods and community groups in San Francisco to develop tours highlighting cultural diversity, immigration history, homelessness and significant architectural sites. These tours seek to emphasise intangible heritage – ‘living’ heritage that is non-material, and focuses on stories that emphasise a sense of space and place in visitors.\(^{518}\) They also draw on a policy of City of San Francisco to promote and preserve ‘social heritage districts’, which looks beyond the built environment and architecture to focus on people’s experiences of living in the city.

San Francisco Architectural Heritage has also recently launched a project focusing on heritage bars and restaurants, which ‘brands’ particular businesses as heritage destinations through stickers and an associated website. There are plans to expand the project to include a smartphone walking tour app. The project focuses on businesses that often do not qualify for heritage status in an architectural sense, and are increasingly threatened by gentrification. The project is not aimed around preservation, rather it is seeks to celebrate ‘legacy’ businesses, thus

---

\(^{516}\) Mr R Ponsford, Executive Officer, Western Melbourne Tourism Inc., Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 287.


encouraging increased patronage. It responds to the legislative situation in San Francisco which mandates the preservation of certain historic buildings, but does not provide protection for the long-standing uses within those buildings. 519

The Committee heard that new technology has also allowed archival heritage collections to be digitised and thus more accessible to tourists. Flagstaff Hill Maritime Village noted that an online catalogue of maritime items has been developed to complement its ‘physical’ exhibitions. 520 A similar project is being developed by the Mountain Cattlemen Association and the Mansfield Historical Society to digitise historical records about the High Country’s pioneering history. Mr Graeme Stoney, coordinator of the digital library project, argued that the database will allow tourists ‘to access the intimate history [of the area] which whets visitors appetites’. 521 The Living Museum of the West has also developed a number of digital exhibitions in the form of walking tours covering a diversity of heritage stories from Melbourne’s West. 522

One of the advantages of new technology is the ability to communicate the layered history of a heritage place. Rather than relying solely on physical signage, an app or a QR code can lead visitors to text and audio-visual material that provides multiple stories and narratives about a particular site. Increasingly apps have interactive functions that allow users to contribute their own experiences about a place, and are often linked with Facebook, Twitter or Instagram, allowing users to share their experiences with others. Digital interpretative technologies also allows users to explore heritage sites at their own pace, and to access more information than can be provided on a traditional sign. Best practice use of these technologies is to augment rather than replace the interpretation offered by standard physical signage and tour guides.

The overwhelming majority of the inquiry’s stakeholders consider the use of digital and online technologies as essential to improving the quality of visitor experiences at heritage sites. Although the Victorian Government’s 2020 tourism strategy identifies technology as a key area for development within the industry, the policy focuses mainly on the use of technology for travel bookings and marketing via social media. 523 The Committee believes that there is significant work to be done to in engaging the heritage tourism industry to improve the quality of heritage interpretation offered to visitors. The issue of interpretation is vital because research suggests that engaging storytelling and heritage information encourages visitors to spend longer exploring heritage places, which can lead to extended stays in Victoria.

The Committee is aware of Victoria’s Framework of Historical Themes, developed by Heritage Victoria to increase understanding of Victoria’s heritage and guide the identification and management of significant heritage places. While the framework does offer information relevant

520 Flagstaff Hill Maritime Museum, submission no. 60, p. 10.
521 Mr G Stoney, Coordinator, High Country digital library project, Mountain Cattlemen’s Association of Victoria, Environment and Natural Resources Committee public hearing – Mansfield, 21 March 2014, transcript of evidence, p. 366.
522 Mr R Ponsford, Executive Officer, Western Melbourne Tourism Inc., Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 288.
to ‘interpretation and tourism planning’, the lack of formal relationship between the heritage and tourism industries does not encourage heritage tourism operators to draw on the expertise of the heritage sector.\textsuperscript{524}

Moreover, despite a strong emphasis on the use of digital technology, current Victorian Government policy does not provide guidance to heritage operators on the use of technologies to enhance visitors’ experiences through improved interpretation.

Accordingly, the Committee recommends that:

**RECOMMENDATION 5.2**

Tourism Victoria and Heritage Victoria collaborate in developing guidelines to assist operators with the interpretation of Victoria’s heritage in a tourism context, building on *Victoria’s Framework of Historical Themes*.

- These guidelines should — in conjunction with the Department of State Development Business and Innovation — include advice on the appropriate use of digital technologies for heritage interpretation.

The Committee believes that funding should be provided to support the development of digital interpretation for heritage tourism. In addition, Heritage Victoria should be appropriately funded to expand its Vic Heritage app. Accordingly, the Committee recommends that:

**RECOMMENDATION 5.3**

The Victorian Government fund a grants program to expand the development of digital interpretation for heritage tourism.

- In addition, Heritage Victoria will work with Tourism Victoria to strengthen the tourism focus of the ‘Vic Heritage’ smartphone app to include more sites throughout the state.

5.3 **Heritage workforce skills and tour guides**

The Committee found that improved skills within the heritage tourism sector — which is dominated by volunteer guides — is crucial to enhancing the quality of visitor experiences. The Committee is aware that volunteers in local historical associations and museums are responsible for preserving and storing a vast collection of heritage objects and artefacts, and that many of these volunteer organisations use their knowledge to operate walking tours of Victoria’s regional towns. The Committee is also familiar with the work of heritage preservation groups such as Seaworks Maritime Precinct, the Australian Aircraft Restoration Group, and the Victorian Association of Heritage Railways, that are responsible for preserving historic items and displaying

\textsuperscript{524} Heritage Council of Victoria, *Victoria’s Framework of Historical Themes*, Heritage Council of Victoria, State of Victoria, Melbourne, 2009, p. 3.
them for public enjoyment. Despite the importance of the work of Victoria’s heritage volunteers, there appears to be little connection between historical associations and preservations groups and the broader tourism sector, and minimal support to train heritage volunteers to engage effectively tourists.

Ms Marie Kau, Secretary of the Talbot Arts and Historical Museum, described her experience of working within volunteer-dominated community museums, noting that:

Overwhelmingly community museums are staffed by volunteers who have minimal relevant training. To realise the potential for developing heritage tourism, including the study of family and local history, support needs to be provided for these volunteers who, it has been estimated, return at least sevenfold in their output in relation to input to their activities. If for only this reason, providing support to volunteers is well worth the investment.525

In relation to improving training for heritage volunteers, Ms Kau mentioned the success of a previous capacity building program for community museums that delivered training for volunteers within the sector.526 Ms Kau also emphasised the importance of appropriate training for tour guides, arguing that ‘it is a quite specialised area, dealing with visitors with an interest in cultural heritage ... it is not really something that just anyone can do well’.527

The Committee heard that there is little connection between the professional expertise of the heritage and museum sector and the largely volunteer staff of the heritage tourism industry. Mr Ian Wight, representative of Australia ICOMOS, argued that developing relationships between heritage professionals and heritage tourism operators is essential to improving the quality of information and interpretation provided to visitors. In this way he argued that:

There is an element in the heritage profession which is a bit under utilised, particularly in the tourism area, and these are specialists in interpretation. These are the people who work out what your experience is going to be when you go into a museum. These same skills are available to work out how you will enjoy or interact with heritage in the whole region.528

Tourism North East identified a lack of professional heritage guides as a key product gap in the High Country inhibiting the development of heritage tourism in the region.529 Mr Jeremy Johnson, Chief Executive Officer of Sovereign Hill also noted that the ‘lack of qualified and skilled guides’ is one of ‘the things that hold us back in regional Victoria’.530 Sovereign Hill undertakes extensive

525 Ms M Kau, Talbot, Tourism Operator, Environment and Natural Resources Committee public hearing – Ballarat, 8 October 2013, transcript of evidence, p. 33.
526 Ibid., p. 33.
527 Ibid., p. 33.
528 Mr I Wight, Victorian representative, Australia ICOMOS, Environment and Natural Resources Committee public hearing – Melbourne, 25 November 2013, transcript of evidence, p. 158.
529 Tourism North East, submission no. 38, p. 10.
530 Mr J Johnson, Chief Executive Officer, Sovereign Hill, Environment and Natural Resources Committee public hearing – Ballarat, 8 October 2013, transcript of evidence, p. 24.
internal training for its tour guides, and as noted in previous chapters is an industry leader in training staff to accommodate Chinese visitors.

As noted in Chapter Four, a TAFE-based accreditation program exists for guides within the ecotourism sector. Nothing similar currently exists for guides working in the heritage area, although some training is available in archival management for museum-based volunteers. While volunteers and paid staff in the heritage tourism sector have diverse backgrounds — many with formal heritage, archival or museum qualifications — the Committee sees value in supporting the heritage tourism workforce to raise the standard of visitor engagement skills throughout the sector.

In relation to developing the heritage tourism workforce, the Committee recommends that:

RECOMMENDATION 5.4
Tourism Victoria, Heritage Victoria, Regional Tourism Boards and the Victoria Tourism Industry Council work together to develop appropriate training modules for staff and volunteers working within the heritage tourism sector.

• Training modules should have a focus on developing skills in heritage interpretation and storytelling for tour guides. These could become part of the existing Tourism Excellence Program.
• The Victorian Government should provide funding to support heritage tourism staff and volunteers to participate in relevant training opportunities.

5.4 Heritage buildings and tourism opportunities
The Committee heard evidence that Victoria’s heritage architecture and buildings — especially in rural towns — are important historical assets that serve as key attractions for visitors. The adaptive re-use of heritage buildings, for tourism, residential or other commercial purposes, is widely acknowledged to represent international best practice. The Committee heard from a range of stakeholders that argued that supporting the preservation of heritage buildings and streetscapes and their re-use for tourism purposes is essential to boosting the appeal of Victoria’s regions.

The Heritage Council of Victoria emphasised the importance of heritage landscapes to the success of a range of festivals, events and regional tourism ventures. As the Council suggests, ‘a large part of “Heritage” Tourism is not major products but the general setting enabling visitors to experience Melbourne or regional centres’.

531 Heritage Council of Victoria, submission no. 16(a), p. 3.
There is a recognised cycle of improving key heritage buildings and streetscapes, which leads to successful businesses, attracting both visitors and new residents whose patronage then ensures the success of the local businesses.532

This recognition that historical buildings and streetscapes can provide an attractive ‘backdrop’ to tourist and commercial activities has been embraced by a number of Victorian towns, particularly throughout the Goldfields. The Victorian Goldfields Tourism Executive argued that ‘the cultural heritage experience of authentically presented and well used heritage buildings in a streetscape with high historic values is fundamental to a developed tourism market’.533 Despite this, the Committee is aware of the perception that running a commercial operation in a heritage-listed building can be difficult due to the cost of preservation works and planning scheme restrictions.

5.4.1 The planning system and heritage overlays

Heritage sites are managed at the local level through the planning system by the use of heritage overlays. In order to create a heritage overlay local councils undertake a heritage assessment of their area to identify places and precincts of local significance. Places are identified using a standardised criteria defined by Heritage Victoria, which includes categories for historical and social significance, aesthetic and architectural values, and recognises the associations between notable people/groups and places. Once significant places have been identified the council must apply to the Minister for Planning to amend their local planning scheme to include a heritage overlay.

Heritage overlays are a mechanism for the identification of significant heritage places at the local level. While heritage overlays regulate the development of land, they cannot force property owners to restore or maintain historic buildings.534 The owners of properties covered by a heritage overlay need to attain a planning permit to do the following works:

- Subdivide land
- Demolish/remove a building
- Undertake construction
- Alter the exterior of a building
- Paint an unpainted building

Heritage overlays rarely affect the ability for owners to undertake interior works and do not limit repairs or routine maintenance.

It is within the purview of local councils to expand the allowable uses of places within heritage overlays. This can be done to extend the social and economic life of a building, such as encouraging the restoration and re-use of a disused church or industrial complex. The Ballarat

532 Ibid., p. 3.
533 Victorian Goldfields Tourism Executive, submission no. 63, p. 4.
City Council has developed the Preserving Our Heritage strategy to simplify the process of operating in a heritage building. Ms Susan Fayad explained the council’s strategy in the following way:

> Basically we wanted to show that we are open for business; we are open for people to come and work with us. It is very much around positive communication and taking a proactive approach, so the key message of the strategy is ‘Yes, you can’ rather than ‘No, you can’t’ with heritage, which is quite different. It is about coming up with win-win opportunities for people.\(^535\)

The Council offers a range of grants programs for owners of heritage properties to undertake preservation and reconstructive works. The Council is also participating in a UNESCO historic urban landscape pilot program which works to assist cities to leverage the advantages of a heritage landscape; ‘how we can use tourism to build back into the heritage and how we can get heritage to build back into the economy of the community’.\(^536\)

The Committee heard from some stakeholders that the current planning zones for green wedges and farms have been restricting heritage tourism developments.\(^537\) Ms Wendy Jones, Chief Executive Officer of Goulburn River Valley Tourism, praised recent farming zone changes that will allow for a wider scope of activities in regional areas. For example, changes to the farming zone will give owners:

> The potential, for instance, if a rail trail was running near or past their product, to look at some other activity, whether that is food and beverage provision or accommodation or whatever. I am not saying that those things were not able to be done, but perhaps it was particularly difficult to do them previously.\(^538\)

### 5.4.2 Adaptive re-use of heritage buildings

Although the Committee did not receive extensive evidence relating to adaptive re-use, the Committee is aware that the adaptive re-use of heritage buildings — including for tourism use — is part of the international best practice management of heritage sites. The Heritage Council of Victoria describes adaptive re-use as:

\(^535\) Ms S Fayad, Coordinator, Heritage, City of Ballarat, Environment and Natural Resources Committee public hearing – Ballarat, 8 October 2013, transcript of evidence, p. 2.

\(^536\) Ibid., p. 3.

\(^537\) See, for example, National Trust of Australia (Victoria), submission no. 70, p. 14 and Yarra Ranges Council, submission no. 59, p. 13.

The conversion of a building site or precinct from one use to another. Where the site being reused has heritage value the new use should support the ongoing interpretation and understanding of that heritage while also accommodating new functions.539

In their submission to the inquiry, the Department of Environment and Primary Industries identified adaptive re-use as an appropriate response to some of Victoria’s state-managed heritage sites, but noted that this is often an expensive process. Accordingly:

In many cases however an initial investment is required to facilitate adaptive reuse and to bring them up to investment ready condition. A new heritage tourism use may develop as a viable business operation but the extent to which that operation can support the full ongoing maintenance of the site may vary.540

Mr Brett Cheatley argued that adaptive re-use is crucial to the survival of many heritage buildings and cited Werribee Mansion as an example of best practice, ‘one of the best in Australia in terms of reuse’.541 At a public hearing in Melbourne Mr Cheatley stated that:

The bottom line is that heritage does require adaptive reuse for survival. Look at the mansion at Werribee. Without the major hotel development with a consortium down there, the mansion would not be anywhere near the condition it is in today if it did not have that major injection of private sector and reuse development.542

Adaptive re-use is often favoured by government because it can preserve the heritage fabric of a building, while extending its economic life: ‘Heritage buildings that are sympathetically recycled can continue to be used and appreciated’.543 Heritage Victoria has recently promoted the opportunities associated with re-using industrial heritage, such as using old railway corridors and infrastructure to create rail trails for walking, cycling and horse-riding. The Committee heard from several groups undertaking the work of adaptive reuse to create rail trails.544

As discussed in detail in Chapter Four, the Committee is aware of the adaptive re-use projects that have taken place within the Golden Gate National Recreation Area operated by the National Park Service. Fort Baker features a number of intact historic structures and landscapes, and is renowned for its views of the San Francisco Bay. The historic buildings are currently being restored and put to new uses, including the Murray Circle restaurant and an accommodation lodge. Similarly, a number of commercial uses exist within the Presidio, generally in refurbished military buildings, such as an accommodation lodge.

540 Department of Environment and Primary Industries, submission no. 80, p. 9.
541 Mr B Cheatley, Consultant, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 273.
542 Ibid., p. 273.
544 See RailTrails Australia, submission no. 74 and Gippsland Plains Rail Trail Committee of Management, submission no. 53.
Another site within the US National Parks Service that has been re-used for tourism purposes is Alcatraz Island. Located in the San Francisco Bay — often referred to as ‘The Rock’ — Alcatraz Island was the site of a US federal prison from 1933 until 1963. Prior to being used as a prison, the Island served as a US fort and was the site of the first lighthouse built on the US West Coast. The island is today managed by the National Park Service as part of the Golden Gate National Recreation Area, which provides ferry access to and conducts tours of the Island. In 1964 the Island was occupied by a group of Native American activists, who stayed for nearly two years protesting US federal government policies relating to Native Americans. The interpretation materials and guided tours at the site aim to weave together different stories about the Island, from Native American history and activism to the site’s use by the Spanish and life as a prison. In this way, the interpretation of the site emphasises the ‘layered’ nature of heritage on the island.

The Committee understands that adaptive re-use for tourism purposes is one of the possibilities being considered in relation to ex-military structures within the Point Nepean National Park as part of the expression of interest process for commercial development in Victorian national parks. The Point Nepean Master Plan considers the adaptive reuse of structure associated with the old quarantine station, including for accommodation, retail, and exhibition/museum spaces.

5.4.3 Funding heritage preservation and tourism projects

The Committee heard that heritage tourism tourist businesses often face challenges associated with operating in historic buildings that require significant maintenance and preservation. As the National Trust noted in its submission:

While there are a few properties open to the public that receive sufficient income from visitation and sales alone to cover most ongoing operating and maintenance costs, the overwhelming majority of community-operated heritage places that are open to the public do not receive sufficient income to cover basic operating and maintenance costs, let alone invest in new interpretation or comprehensive conservation of these places.

On its study tour the Committee met with officials from the provincial government’s heritage agency in British Columbia, Canada, which has begun to issue licences for private organisations to operate heritage sites as commercial ventures. Due to the cost associated with preserving and managing heritage buildings, the provincial government has embarked on a process known as ‘devolution’ whereby site management agreements are issued to not-for-profit and commercial groups to operate heritage properties as tourist sites.

547 National Trust of Australia (Victoria), submission no. 70, p. 12.
The Committee visited Emily Carr House, located in Victoria, British Columbia, which is currently operated by the Ross family under a Heritage Site Management Agreement as part of the devolution policy. Emily Carr House is a National and Provincial Historic Site and is the birthplace of the writer and artist Emily Carr. The Ross family were the only people to apply to manage the house. The provincial government continues to provide funding for maintenance and restoration works on the house. The Ross’ are exploring options for adaptive re-use, such as creating a coffee shop or B&B in the house, and have started hosting events and art shows.

It remains uncertain whether devolution offers a longer-term solution to the cost associated with maintaining heritage sites in Canada or elsewhere. While some sites are managed by historical societies with strong connections to local communities and volunteers, these groups are usually more concerned with preservation than with creating a commercially viable tourist attraction. Further, the uptake of Heritage Site Management Agreements has been very low, and the provincial government retains responsibility for funding major restoration works.

The Committee is aware that in some other jurisdictions significant funding is set aside for the funding of heritage assets — and thus heritage tourism — such as the UK and WA lottery funds. Mr Martin Purslow, Chief Executive Officer for the National Trust of Victoria described the impact of the UK lottery fund on heritage tourism and preservation:

> From my experience in the United Kingdom — and I have had quite a lot of success with the Heritage Lottery Fund in the UK from a variety of different heritage projects — we are talking about $3.2 billion in 10 years invested in heritage over there, generated from the public lotteries. The National Trust made a submission some years ago when the gaming review was on. We were looking again at the lottery, and we asked for a half of 1 per cent of the take to be put into a heritage fund, which would have been a very modest amount, but we did not get any traction.

The UK Government’s decision to invest heavily in heritage tourism has been supported by a shift in the recognition of the economic value of the heritage tourism sector. A report prepared by the Heritage Lottery Fund argued that ‘the size of the heritage-tourism sector is in excess of £12.4 billion a year and supports an estimated 195,000 full-time jobs’. The report argues that the impact of the heritage sector had been underestimated; in actuality ‘heritage is the mainstay of the UK tourism economy’.

---

551 Mr Martin Purslow, Chief Executive Officer, National Trust, Environment and Natural Resources Committee public hearing – Melbourne, 25 November 2013, transcript of evidence, p. 7.
553 Ibid., p. 6.
The National Trust also pointed to the situation in Western Australia where lottery funding delivers approximately $5 million to heritage projects.\textsuperscript{554} Heritage in Western Australia also benefits from the Royalties for Regions program. In Victoria, a portion of the proceeds from gaming is distributed to community projects and programs through the Community Support Fund. Under the \textit{Gambling Regulation Act 2003}, 8.33 per cent of the government’s revenue from electronic gaming machines in hotels is placed in the Fund. The Fund has a number of proscribed uses, including supporting:

- Programs related to problem gambling;
- Drug education, treatment and rehabilitation;
- Financial counselling support for families in crises;
- Youth programs;
- Sport and recreation; and,
- Arts and tourism and related community projects.\textsuperscript{555}

Some local councils have developed incentives to encourage the owners of recognised heritage properties to maintain and restore heritage buildings. For example, Bendigo City Council runs a free heritage advisory service and a no-interest heritage loan scheme to assist property owners considering renovation or restoration.\textsuperscript{556} Ballarat City Council also offers advice and loans to owners of heritage properties, and also runs a heritage awards program to recognise excellence in the adaptive re-use of heritage properties. In addition, Heritage Victoria formally provided grants to assist the owners of heritage properties.

The Committee believes that the Victorian Government should play a role in encouraging the preservation and adaptive re-use of heritage buildings for the purposes of heritage tourism. The Committee understands that preservation and restoration works can be costly, and a strong disincentive to some owners. Accordingly, the Committee recommends that:

\begin{quote}
\textbf{RECOMMENDATION 5.5}

The Victorian Government draws on the Community Support Fund to support community organisations and local councils to fund heritage tourism projects. Funded projects will have a clear focus on supporting heritage tourism, not simply on conserving or restoring heritage buildings.
\end{quote}

As discussed above, a number of local government councils are active at encouraging the adaptive re-use and preservation of heritage buildings in their areas. Moreover, some local

\textsuperscript{554} Mr Martin Purslow, Chief Executive Officer, National Trust, Environment and Natural Resources Committee public hearing – Melbourne, 25 November 2013, transcript of evidence, p. 7.


councils offer small grants to the owners of properties listed under heritage overlays. The National Trust also works with local councils to award prizes for heritage restoration and adaptive re-use, which aims to instil pride in maintaining Victoria’s heritage.

The Committee is aware that Victoria’s Heritage Restoration Fund — a partnership between the City of Melbourne, Department of Transport, Planning and Local Infrastructure, and the National Trust — provides funding to support the preservation and maintenance of places listed on the Victorian Heritage Register.557

Alongside these financial incentives, the Committee believes that it is important to encourage the broader community to value heritage properties and to understand their possible contribution to the economy – as part of an attractive heritage landscape, or as structures that can be reused for tourism, retail, education or commercial purposes.

Therefore the Committee recommends that:

**RECOMMENDATION 5.6**

The Victorian Government works with Heritage Victoria, Tourism Victoria, and local government to develop incentives, or remove disincentives, for private owners to restore and maintain heritage buildings and structures for tourism use. Incentives can includes heritage awards programs, small grants and/or planning or taxation concessions.

---

Chapter Six

Supporting Aboriginal tourism

Research suggests that Aboriginal culture is a key drawcard for international visitors to Australia, and that Victoria is well-placed to capitalise on this demand. The Victorian Government’s recent Aboriginal tourism strategy views Aboriginal tourism as a method for increasing the regional dispersal of visitors and also seeks to develop Melbourne as a destination known for providing accessible Aboriginal experiences. The Committee found that there was great interest amongst industry organisations and Indigenous groups in developing Aboriginal tourism, and a strong awareness of international best practice in the Indigenous tourism sector.

In exploring ways to support Aboriginal tourism this chapter address term of reference two – ‘examining best practice in ecotourism and heritage tourism’. Aboriginal tourism typically combines aspects of ecotourism and heritage tourism, as it often focuses on the historical and cultural relationship of Indigenous peoples to the land. The major Indigenous tourism products in Victoria — such Brambuk Cultural Centre and the Tower Hill Wildlife Reserve — illustrate this integration between nature-based and heritage tourism, and are founded on partnerships between Parks Victoria as a land manager and local Aboriginal communities. Victoria’s newly established Registered Aboriginal Parties are also becoming involved in cultural heritage tourism, such at the Budj Bim National Heritage Landscape in Victoria’s south-west. While Victoria currently has very few Aboriginal tourism ventures, the Committee believes there is enormous potential to grow the sector and develop engaging and ‘authentic’ Indigenous tourism experiences.

6.1 Victoria’s Aboriginal tourism policy

In 2013 the Victorian Government released Victoria’s Aboriginal Tourism Strategy 2013-2023 (‘the Aboriginal Tourism Strategy’). The Aboriginal Tourism Strategy focuses on supporting the development of high-quality, authentic Indigenous products and experiences. The strategy draws on research that indicates that international visitors desire an Indigenous tourism experience as part of their trip to Australia. Despite this, Victoria secures only 12 per cent of the total Aboriginal tourism activity undertaken by international visitors to the country. The policy considers Aboriginal tourism as a vehicle for economic development for Indigenous communities and a good method for encouraging the dispersal of visitors throughout regional Victoria. The strategy outlines four key policy directions:

---

559 Ibid., p. 2.
560 Ibid., pp. 4-6.
• To position Melbourne as a destination recognised as having a suite of in-depth authentic experiences;

• To develop and promote regional Indigenous tourism experiences;

• To develop and grow Indigenous business capabilities; and,

• To market and distribute Indigenous products and experiences to a global audience. 561

The strategy identifies, as a measure of success, that at least one unique iconic attraction will establish Victoria as a destination for Aboriginal tourism. The policy also outlines the following key actions to be undertaken to deliver outcomes: To develop an Aboriginal Victorian brand that differentiates itself from outback Australia; to ensure that regional experiences are well positioned and marketed; to support a UNESCO World Heritage listing application for the Budj Bim National Heritage Landscape; to develop an Aboriginal Cultural Awareness Program for both Indigenous and non-Indigenous tourism businesses; and, to work with Tourism Australia and Aboriginal Business Australia to support and market Victorian Aboriginal tourism businesses. 562

The inquiry’s stakeholders had a mixed response to the strategy’s potential to boost the Aboriginal tourism sector. Ms Kathryn Mackenzie, Chair and President of Cultural Tourism Victoria, was ’thrilled’ by the policy’s announcement and argued that ’it very fairly addresses Melbourne and the regions and how we move forward’. 563 In contrast, Mr Jeremy Clark, CEO of Brambuk Cultural Centre in the Grampians National Park, viewed the policy ’as a failed opportunity, with the same old ideas being pushed’. 564 In particular, he was concerned by the lack of emphasis on ’supporting existing Aboriginal tourism businesses that require assistance, and there are a few of us around the state. Some have fallen by the wayside and closed, which has been unfortunate’. 565

6.1.1 Aboriginal tourism in other Australian jurisdictions

New South Wales’ Aboriginal Tourism Action Plan 2013-2016 is designed to support the growth of the state’s Aboriginal tourism sector, with the aim of promoting Aboriginal culture and achieving ‘economic and social benefits for Aboriginal people, both as operators and employees’. 566 The policy aims to raise awareness of Aboriginal heritage within the heritage industry and includes increased promotion of Aboriginal tourism products. In order to support the development of

\[ \text{References:} \]

561 Ibid., p. 3.
563 Ms K Mackenzie, Chair and President, Cultural Tourism Victoria, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 280.
564 Mr J Clark, Chief Executive Officer, Brambuk National Park and Cultural Centre, Environment and Natural Resources Committee public hearing – Halls Gap, 18 March 2014, transcript of evidence, p. 347.
565 Ibid., p. 347.
‘market-ready’ and ‘export ready’ businesses, Destination NSW will develop training workshops and capacity building programs.567

Western Australia’s policy — Making a Difference: Aboriginal Tourism Strategy for Western Australia 2011-2015 — was developed through a partnership between the WA Government and the Western Australian Indigenous Tourism Operators Council. The policy acknowledges that WA already has ‘a strong and vibrant Aboriginal tourism industry’.568 The strategy aims to continue the success of the sector by integrating Aboriginal tourism experiences into the broader tourism industry ‘to ensure it becomes an integral part of what makes Western Australia special’.569 In order to achieve this the state will prioritise Aboriginal tourism experiences in its marketing materials and appeal to visitors as the leading destination for Aboriginal attractions. The policy argues that despite the success of many Aboriginal tourism businesses, the sector still requires assistance with business planning, marketing, training programs and funding support.570

Other jurisdictions do not have current Aboriginal tourism plans, although in Queensland Indigenous tourism is viewed as an integral part of the state’s overall tourism offering.571

### 6.2 Aboriginal heritage in Victoria’s national parks

Aboriginal tourism in national and state parks has the potential to bridge the ecotourism and heritage tourism sectors through a focus on the relationship between Indigenous peoples and the land. Parks Victoria and the Department of Environment and Primary Industries (DEPI) are involved as land managers in partnerships with Aboriginal communities throughout Victoria. In particular, Parks Victoria states that it manages more than ‘11,000 registered Aboriginal sites’ across the state’s parks and reserves.572 Both Parks Victoria and DEPI believe there is scope to further develop Aboriginal tourism within the state’s parks.

In its submission to the inquiry DEPI acknowledged that Aboriginal tourism within parks ‘is in a relatively early stage’, but noted that:

> Aboriginal Victorians have a unique connection with the land and its stories. Aboriginal heritage and ecotourism on public land provide significant potential for further development and can offer opportunities for Aboriginal people to maintain connection to country.573

Parks Victoria emphasised the importance of developing relationships with traditional owners, not only in the context of land management but in partnering to interpret Victoria’s landscape:

---

567 Ibid., p. 20.
568 Tourism Western Australia, Making a Difference: Aboriginal Tourism Strategy for Western Australia 2011-2015, Tourism Western Australia, Perth, 2011, p. 4.
569 Ibid., p. 4.
570 Ibid., p. 6.
572 Parks Victoria, submission no. 71, p. 1.
573 Department of Environment and Primary Industries, submission no. 80, p. 10.
In terms of recognising traditional owners, I think that is front and centre in terms of park management across Australia and certainly in Parks Victoria. We recognise the traditional owners of the land we are on. How that story is told and how that story elevates through communities is something that needs greater focus and greater emphasis.  

The agency also noted that it encourages tourism operators that visit known Aboriginal heritage sites or tell stories relating to Aboriginal culture ‘to contact the relevant Aboriginal people for their input and endorsement’.

Expanding Aboriginal tourism is part of the Victorian Government’s policy of encouraging private investment in national parks. One of the key principles that will be considered when assessing proposals for development is that ‘access to national parks by Aboriginal enterprises for tourism operations should be encouraged’. In addition, the conservation of ‘Aboriginal and historic cultural values of national parks’ is one of the intended benefits of increasing private investment.

Some stakeholders argued that more could be done to highlight Aboriginal culture in Victoria’s parks. For example, Mr Clark, CEO of Brambuk Cultural Centre in the Grampians National Park stated that:

We would like to see dual signage at the very least throughout the park, for the Aboriginal story to be told in the park. The park is marketed on its natural assets, and that is great, but there is a whole layer of Aboriginal heritage that is not part of it. If that happens, it will lift the profile of Aboriginal people and the profile of our heritage.

At a public hearing in Hobart the Committee heard about partnering with Aboriginal communities to use new technologies to tell intangible stories about Aboriginal heritage within national parks. Mr Stuart Lennox explained a new program using YouTube and temporary structures to provide an Aboriginal interpretive experience near Melaleuca:

The most important and successful project is a recent one we have done at Melaleuca in the south-west called Needwonnee. Again I would encourage you to have a look on YouTube. It is about an 11-minute presentation on the Needwonnee people who lived in the south-west and how we have developed an experience based on an interpretative experience that is ephemeral. What I mean by that is that with the community — this is the Aboriginal community — we have built hut structures, bark canoes, a whole range of things down there which describe their lifestyle. These things will eventually decay. For example, there are

---

574 Mr I Walker, General Manager, Environment and Heritage, Parks Victoria, Environment and Natural Resources Committee public hearing – Melbourne, 7 November 2013, transcript of evidence, p. 102.
575 Parks Victoria, submission no. 71, p. 6.
576 Department of Sustainability and Environment, Tourism Investment Opportunities of Significance in National Parks: Guidelines, Victorian Government, Melbourne, 2013, p. 3.
577 Ibid., p. 1.
578 Mr J Clark, Chief Executive Officer, Brambuk National Park and Cultural Centre, Environment and Natural Resources Committee public hearing – Halls Gap, 18 March 2014, transcript of evidence, p. 347.
kelp basket water carriers down there which are hanging in the trees, there are necklaces. There are all these elements of their life which eventually will decay, but the idea is to bring the community back year after year and recreate new elements to the Needwonnee experience. 579

Ms Sara Quon, CEO of Tourism North East, explained the partnerships that are developing between Parks Victoria and local Indigenous communities in the High Country:

We have a number of sites which have quite significant Indigenous cultural heritage value. We really look to Parks Victoria in terms of its partnership with the traditional owners reference group, which has been operating particularly around the Bogong High Plains for a number of years. 580

The Committee visited a number of national parks as part of the inquiry process and observed that the existence of interpretative signage and information about Aboriginal heritage varied dramatically between parks. At the Bay of Islands in the Port Campbell National Park the Committee saw some older small signs providing information about the Kirrae Whurrong people – and a brief mention of the massacre sites along the Great Ocean Road – while in the Alpine National Park the Committee found new signage and information huts explaining the significance of the Bogong moth to the Aboriginal people of the High Country. At the Grampians National Parks, the site of Australia’s largest concentration of Indigenous rock art – interpretation about Aboriginal heritage is contained mainly within the Brambuk Centre, with minimal information on in-park signage.

The Committee believes that traditional owner groups should not only be consulted by Parks Victoria on issues of land management, but engaged as partners in the interpretation of Aboriginal heritage on public land. The tourism experiences available within Victoria’s parks are not only confined to nature-based or adventure activities and the stories that can be told about the land are not limited to ecology.

Victoria’s recently established system of Registered Aborigina ls Parties (RAPs) provides an opportunity for public land managers to identify the relevant traditional owner communities to consult regarding Aboriginal heritage. Aboriginal heritage in Victoria is managed by the Aboriginal Heritage Act 2006, which provides for the appointment of traditional owner organisations — known as Registered Aboriginal Parties — to manage Aboriginal heritage at the local level. The Aboriginal Heritage Act 2006 established the Victorian Aboriginal Heritage Council, which is responsible for appointing RAPs and also for promoting awareness and understanding of Aboriginal cultural heritage in Victoria. The Council has so far appointed ten RAPs, which collectively cover over 50 per cent of Victoria. The RAP system provides for Aboriginal people to be involved in the management and protection of cultural heritage, which includes a mechanism for assessing the cultural heritage values of areas as part of the statutory planning process. The

579 Mr S Lennox, Director Visitor Services, Tasmanian Parks and Wildlife Services, Environment and Natural Resources Committee public hearing – Hobart, 13 February 2014, transcript of evidence, p. 231.
580 Ms S Quon, Chief Executive Officer, Tourism North East, Environment and Natural Resources Committee public hearing – Mansfield, 21 March 2014, transcript of evidence, p. 361.
Committee believes that the tourism experience offered by Victoria’s public parks will be considerably enriched by a stronger emphasis on the heritage of the state’s Aboriginal peoples, and that RAPs are the appropriate bodies to guide the interpretation of Aboriginal cultural heritage in their areas.

As a result, the Committee recommends that:

**RECOMMENDATION 6.1**

Parks Victoria work with the Victorian Aboriginal Heritage Council and Registered Aboriginal Parties to develop a framework to guide the interpretation of Aboriginal heritage throughout Victoria’s public lands reserve.

### 6.3 Victoria’s potential as an Aboriginal tourism destination

There was broad acknowledgement from the inquiry’s stakeholders that there is considerable scope to grow the Aboriginal tourism sector in Victoria. Mr Rodney Carter, Chair of the Victorian Aboriginal Heritage Council, argued that the Aboriginal tourism sector was yet to ‘realise’ best practice.\(^{581}\) Despite this, Mr Carter noted that Victoria was well-placed to expand the Aboriginal tourism sector:

> Victoria is in a good position in that as we are such a small state it is geographically easier to get around the diverse landscape and topography, and as I mentioned earlier, there is a great diversity in the Indigenous people within Victoria.\(^{582}\)

Cultural Tourism Victoria also suggested that Victoria is poised to capitalise on the demand for Indigenous experiences, arguing that:

> Aboriginal culture is a key competitive advantage that Australia enjoys over other destinations, and Victoria is rich with Indigenous culture which could be appropriately interpreted for domestic and international visitors.\(^{583}\)

Native Title Services Victoria was supportive of boosting Aboriginal tourism, linking it to increasing regional dispersal and arguing that ‘celebrating the State’s Aboriginal culture in a culturally sensitive way would add value to any tourism opportunity by deepening the visitor experience’.\(^{584}\)

Some stakeholders emphasised the potential economic benefits to increased tourism for Aboriginal communities, particularly for traditional owners. In this way the Victorian Aboriginal Heritage Council argued that: ‘Heritage tourism is an exciting opportunity for Traditional Owners

---

581 Mr R Carter, Chair, Victorian Aboriginal Heritage Council, Environment and Natural Resources Committee public hearing – Melbourne, 25 November 2013, transcript of evidence, p. 177.

582 Ibid., p. 177.

583 Cultural Tourism Victoria, submission no. 65, p. 3.

584 Native Title Services Victoria, submission no. 53, p. 4.
to plan for the benefit of future generations’.\textsuperscript{585} Similarly, Native Title Services Victoria argued that Aboriginal tourism can be part of economic development for traditional owners — ‘as a culturally appropriate strategy for increasing their equity and active participation in Victoria’s regional economy either as a proponent or a partner’.\textsuperscript{586}

A number of stakeholders commented on the potential to develop a best practice Indigenous tourism product at the Budj Bim National Heritage Landscape in south-west Victoria. The Department of Environment and Primary Industries views Budj Bim as an example of successful collaboration between the state and Aboriginal communities:

> We have had particular success with the Gunditjmara people in the south-west managing the Budj Bim landscape, including Lake Condah, where aquaculture has been practised for thousands of years. The Budj Bim National Heritage Landscape around the Mount Eccles area was declared by the Australian government in July 2004 for its outstanding value as part of Australia’s national heritage, and we are now reaching a point where Aboriginal groups can build on these arrangements and become even more involved in tourism enterprises.\textsuperscript{587}

In its submission the Glenelg Shire Council emphasised the potential for development at Budj Bim to boost the area’s tourism industry:

> There is great potential to increase heritage and ecotourism around the Budj Bim narrative and landscape. If this can be done it could be a “game changer” for the tourism industry in this Shire. At present there is a consultancy underway looking at nature based tourism centred on Heywood, which is the town closest to Budj Bim.\textsuperscript{588}

As mentioned above, developing Budj Bim to UNESCO World Heritage standard is emphasised in the Victorian Government’s Aboriginal Tourism Strategy. The Committee is aware that the Victorian Government is currently working with the Australian Government to include the site on Australia’s tentative list for World Heritage nominations.\textsuperscript{589} The Committee discusses the potential benefits of applying to increase the number of World Heritage Listed sites in Victoria in Chapter Seven.

The Committee heard evidence relating to a range of other heritage sites and areas in Victoria that have the potential to be developed into tourism destinations and experiences. Gannawarra Shire Council noted that their municipality is rich in Aboriginal archaeological heritage, which could lead to tourism development.\textsuperscript{590} Yarra Ranges Shire Council commented on the potential for developing Aboriginal tourism experiences centred on the culture of the Wurundjeri people and

\begin{footnotes}
\textsuperscript{585} Victorian Aboriginal Heritage Council, submission no. 76, p. 2.
\textsuperscript{586} Native Title Services Victoria, submission no. 53, p. 1.
\textsuperscript{587} Mr P Beaumont, Executive Director, Land Management Policy, Department of Environment and Primary Industries, Environment and Natural Resources Committee public hearing – Melbourne, 25 November 2013, transcript of evidence, pp. 170-1.
\textsuperscript{588} Glenelg Shire Council, submission no. 24, p. 2.
\textsuperscript{590} Gannawarra Shire Council, submission no. 28, p. 3.
\end{footnotes}
featuring stories relating to the Coranderrk mission at Healesville.591 The National Trust also notes that it is exploring the development of Aboriginal heritage experiences at a number of its sites, including Mooramong, which features stony rises recorded on the Victorian Aboriginal Heritage Register, and McCrae Homestead, where there are plans to showcase how the McCrae family ‘had positive interaction with the local Bunerong [sic] community’.592

As noted above, one of the objectives of the new Aboriginal Tourism Strategy is to develop Melbourne as a destination with Aboriginal tourism experiences. The Committee heard from Melbourne Museum about their role in promoting Aboriginal heritage in Melbourne, arguing that the Museum ‘provides an ideal gateway for tourists wishing to explore Victoria’s rich heritage and environments’.593 The Museum notes that following the opening of the new exhibition in its Bunjilaka Aboriginal Cultural Centre ‘we are working closely with Tourism Victoria to make the most of the opportunity’.594 Some stakeholders highlighted the potential for further developing tourism experiences relating to Melbourne’s Aboriginal heritage. For example, Western Melbourne Tourism and LeadWest highlighted the ‘wealth of heritage sites’ in Melbourne’s west, including important archaeological sites in Keilor.595 Port Phillip Council and Port Phillip EcoCentre both emphasised St Kilda’s Aboriginal heritage sites, including a gathering place.596

The Committee believes that there is a need for the development of a showcase Aboriginal heritage tourism destination in regional Victoria.

6.3.1 Visitor expectations and cultural authenticity

The experiences of the inquiry’s stakeholders suggested that visitors to Australia are interested in participating in Aboriginal tourism experiences, and expect to be able to access authentic Aboriginal tourism products in Victoria. At the public hearing in Halls Gap, Mr Clark argued that Brambuk’s ‘key point of difference’ is that it provides an opportunity for visitors to engage with Aboriginal people and their culture:

> We provide authentic Aboriginal experiences. People, when they visit Brambuk, can talk to an Aboriginal person. Surprisingly that is a very big thing. The chance just to talk one-on-one with an Aboriginal person is a highlight for visitors, particularly international visitors.597

The Committee heard that there was a desire amongst some of the Aboriginal community to emulate the success of Indigenous tourism in New Zealand. As Mr Mick Harding, member of the Victorian Aboriginal Heritage Council noted:

591 Yarra Ranges Shire Council, submission no. 59, p. 10.
592 National Trust of Australia (Victoria), submission no. 70, p. 8.
593 Museum Victoria, submission no. 22, p. 1.
594 Ibid., p. 1.
595 Mr C Rowley, Chief Executive Officer, LeadWest, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 289.
596 City of Port Phillip, submission no. 43, p. 1 and Port Phillip EcoCentre Inc, submission no. 44, p. 1.
597 Mr J Clark, Chief Executive Officer, Brambuk National Park and Cultural Centre, Environment and Natural Resources Committee public hearing – Halls Gap, 18 March 2014, transcript of evidence, p. 345.
It seems to me that if you go to New Zealand, for instance — this is my own experience — you get a sense that each and every individual who is not of indigenous blood understands some really founding principles behind Maori culture. That is the sort of thing that I strive for personally, and I would like to think that other traditional owners throughout the state are able to have that opportunity to build that capacity.598

Tourism North East identified Aboriginal tourism as an area that the High Country needs to better manage in order to meet visitor expectations. The organisation argued that Aboriginal tourism experiences should be ‘immersive, memorable and experiential’, and that there is potential to develop tourism products that explore the Aboriginal ‘stories and connections [that] are rich along the Bogong High Plains and around the Winton Wetlands area’.599 Mildura Tourism also noted that visitors to their region increasingly expected Aboriginal tourism experiences, suggesting that ‘in this sector anecdotally, demand seems greater than supply’.600 The Victorian Aboriginal Heritage Council argued that Aboriginal heritage can ‘add value’ to Victoria’s tourism product, ‘so it is giving a customer or a person out there a better product or a more unique product’.601

Mr Roger Grant from Geelong Otway Tourism noted that it was sometimes a ‘challenge’ for tourism ventures to tell stories about Victorian Aboriginal people rather than focus on a ‘general’ Australian Aboriginal experience, and encouraged partnerships between local Indigenous communities and academic researchers.602 Dr Rosalind Jessop, Environment Manager of Phillip Island Nature Parks, also noted that there had been difficulties developing Aboriginal tourism products on the Island due to a lack of information regarding the location of heritage sites: ‘A lot of the information on Indigenous heritage was gathered a long time ago, and there is not much accurate information on exactly where it is’.603

6.3.2 Tourism and ‘difficult’ heritage

Some stakeholders were concerned that there is a tendency for tourist experiences and information to avoid discussing ‘difficult’ elements of Victoria’s heritage, particularly in relation to colonial violence involving Aboriginal people. Commenting on the opportunity of expanding Aboriginal tourism, Dr Bob Brown argued that:

I believe our history of the destruction of Aboriginal people ought to be out there and openly available for people to read about. It does not need to be embellished

598 Mr M Harding, Council Member, Victorian Aboriginal Heritage Council, Environment and Natural Resources Committee public hearing – Melbourne, 25 November 2013, transcript of evidence, p. 177.
600 Mildura Tourism, submission 62, p. 5.
601 Mr R Carter, Chair, Victorian Aboriginal Heritage Council, Environment and Natural Resources Committee public hearing – Melbourne, 25 November 2013, transcript of evidence, p. 177.
602 Mr R Grant, Executive Officer, Geelong Otway Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, pp. 58-9.
603 Dr R Jessop, Environment Manager, Phillip Island Nature Parks, Environment and Natural Resources Committee public hearing – Melbourne, 7 November 2013, transcript of evidence, p. 116.
but at the moment it is kept off the agenda, and I think until we recognise — for example, in Tasmania 1,000 Aboriginal people in records were shot and 250 whites were speared in return. There was a real war on there. You will see nothing of that in visiting Tasmania and yet people from Europe and Asia, they are asking about this.  

The National Trust described how they have incorporated performance into their education program at the Old Melbourne Goal in order to directly address the history of the relationships between Aboriginal people and the justice system. Mr Martin Purslow, CEO of the National Trust of Australia (Victoria) stated that:

This is an innovative experience, where you can get locked up in the watch-house and experience firsthand what it might have been like to be in that situation. It also enables us to deal with very difficult issues. This looks at an issue of Aboriginal people versus justice. In actual fact it is not what you see. What you see is probably prejudice, what you see is a policeman, but what you actually have here is a cat burglar, and the gentleman playing the cat burglar is an Aboriginal person who is playing himself.

Australia ICOMOS argued that the key to incorporating ‘difficult’ aspects of heritage into tourism experiences was to pursue consultation and partnerships with the relevant Aboriginal communities. Explaining the attraction of ‘dark history’ to tourists, and the need to acknowledge and respect all aspects of Aboriginal heritage, Ms Lisa Gervasoni stated that:

ICOMOS is also very supportive of [the tourism industry] working with Indigenous communities to ask, ‘How do you tell that story, and is it appropriate to tell?’, and to work that out. I can think of three key opportunities where you can blend the range of history offerings in key tourism areas. Obviously the Great Ocean Road is a great natural environment, but you have places like Massacre Bay, where you can talk about dealing with the Indigenous community. You can finish off in Warrnambool with the Hopkins River mouth, which is a site that proves how early Indigenous settlement was in Victoria ...

Ms Gervasoni also noted that addressing ‘difficult’ elements of the past is part of presenting a multi-layered history of the place that embraces a number of heritage themes including colonisation. In relation to the history of the Macedon Ranges and spa country, Ms Gervasoni argued that the area has many themes that tourism could emphasise, for example:

You have the Indigenous creation stories and the different volcanoes throwing fire at each other. At one of them, Mount Franklin, you also have the early protectorate there, so there are opportunities to look at the impact of settlement and the gold rushes on Indigenous communities ... It is about making sure you work with local communities, being respectful to the story and also showing that there is

---

605 Mr Martin Purslow, Chief Executive Officer, National Trust, Environment and Natural Resources Committee public hearing – Melbourne, 25 November 2013, transcript of evidence, p. 138.
a continuum. You do not just have something in a neat little box; there are a range of aspects to any tourism place.606

The Committee believes that heritage tourism experiences that tell multi-layered stories about the past are central to providing visitors with an engaging, ‘authentic’ Victorian experience. Aboriginal history — including themes of colonisation and violence — are part of the state’s story and should not be ignored. Indeed, there is some evidence to suggest that tourists are fascinated by the history of colonisation, and that in consultation with Aboriginal communities, this history can be part of the heritage story offered by the tourism industry. Similarly, a range of sites relating to non-Aboriginal heritage have ‘difficult’ histories that could be explored in a tourism context. For example, Point Nepean National Park was one site visited by the Committee that has a ‘difficult’ side to its history relating to the treatment of disease and the histories of migration and colonisation at the quarantine station.

6.4 Supporting Aboriginal tourism ventures

While the majority of the inquiry’s stakeholders agree there is significant potential to grow the Aboriginal tourism sector, the Committee heard that Aboriginal tourism ventures require support to develop into sustainable businesses that offer quality tourism experiences. In particular, the Committee heard that workforce skills training and organisational capacity building is important to supporting the development of Aboriginal tourism ventures, especially for Registered Aboriginal Parties. The Committee also heard about the potential benefits for Aboriginal businesses to partner with government agencies — such as Parks Victoria — or non-Aboriginal commercial operations to build stable businesses. Further, as part of its North American study tour, the Committee learnt of the work of the Aboriginal Tourism Association of British Columbia, which has been instrumental in supporting Aboriginal tourism businesses in Canada to become ‘market ready’.

6.4.1 Product development and ‘market readiness’ in British Columbia

The Aboriginal Tourism Association of British Columbia (AtBC) is a non-profit, stakeholder-based organisation that is committed to growing and promoting a sustainable First Nations tourism industry. The sixty stakeholders with AtBC range from gallery curators to jet boat guides, wineries and cultural interpretative experiences that are located in every corner of the province. Each stakeholder is an Aboriginal-owned business that guarantees cultural authenticity as part of its attraction. Experiences range from canoe journeys and interpretive jet boat tours to Aboriginal-owned museums, heritage villages, and cultural centres. In 2011, British Columbia’s Aboriginal tourism industry contributed $42 million to the provincial economy.607

---

606 Ms L Gervasoni, Victorian Committee Member, Australia ICOMOS, Environment and Natural Resources Committee public hearing – Melbourne, 25 November 2013, transcript of evidence, p. 160.
The AtBC is considered a world leader in best practice for Indigenous tourism and community development, and offers a good model for what could be considered in the Victorian context. In particular, BC has a diversity of First Nations groups, numbering more than 200 distinct clans and a largely urban Indigenous population. The organisation is mandated by the leadership of BC’s First Nations groups and as a result is viewed as a professional and objective industry organisation, not a political or activist group. Further, all AtBC’s board members are Aboriginal tour operators and business leaders. The organisation has a strong international role as part of the World Indigenous Tourism Alliance, and is recognised as leading best practice in the Indigenous tourism sector. AtBC has also developed partnerships with other Indigenous tourism bodies such as the Western Australian Indigenous Tourism Operators Council. AtBC receives a mix of provincial and federal government funding (up to $2 million per annum) and Aboriginal business pay to participate in the organisations marketing and promotional campaigns.

A key focus for AtBC over the past ten years has been to support Aboriginal tourism businesses to become ‘market ready’ or ‘export ready’. This has been a process of supporting businesses to develop appropriate tourism products and experiences, improving marketing and the accessibility of information about Aboriginal tourism, and encouraging businesses to undergo tourism and hospitality training (such as the World Host program). There are now approximately eighty ‘export’ ready Aboriginal tourism businesses in BC, and a further 100 in the early stages of development. AtBC is transitioning into the second phase of its development with a five year plan to see the Aboriginal tourism industry become a $68 million industry by 2017. Part of this plan is to engage businesses in how to tailor tourism products for Chinese visitors.  

AtBC operates a sophisticated website and social media presence that showcases its member organisations. It also produces print materials (with QR codes linking visitors to the website) which are distributed by Destination BC and BC’s regional tourism organisations. AtBC plans to develop the websites further to offer direct sales for accommodation and tours, so that visitors do not need to leave AtBC’s website to book products. AtBC works with the province’s tourism marketing agency — Destination BC — and has aligned its marketing with Destination BC’s tourism regions, despite the fact that the six regions do not correspond to the traditional boundaries of BC’s First Nations people.

AtBC has a focus in promoting and supporting the development of authentic Aboriginal tourism experiences. Companies must be 51% owned by Aboriginal individuals or groups to be included in marketing as authentically Aboriginal. AtBC ensures that all tourism companies have the support of the relevant First Nations and maintain appropriate cultural protocols (such as not sharing secret or sacred stories). The advent of TripAdvisor and other social media platforms has made it easier for tourists to communicate with each other and identify fraudulent products and experiences.  


Ibid.
AtBC is also interested in shifting visitor expectations towards experiencing Aboriginal culture through storytelling, rather than only ‘passively’ viewing totem poles or performances. AtBC estimates that 1 in 4 visitors to BC seek an Indigenous experience, and the industry cannot meet this demand. The organisation works with government stakeholders to emphasis the growing economic potential of Aboriginal tourism, particularly as forestry and mining has declined. Parks Canada has signed a memorandum of understanding with First Nations to develop Indigenous interpretation and experiences within national parks.

As part of its study tour, the Committee visited Klahowya Village in Stanley Park, a cooperative venture from the three First Nations groups in the Vancouver area; the Squamish Nation, the Tsleil-Waututh Nation and the Musqueam First Nations. The Village is a key site for ‘intercepting’ tourists in Vancouver and directing them to Aboriginal experiences in other areas. The site is open only for the summer peak season and includes performances, craft workshops, information displays and the spirit catcher miniature train ride. It is child-focused and aims to educate the next generation of consumers. The aim is for Aboriginal tourism products to continue to develop and expand as this audience grows. Each summer the park adopts a ‘theme’ — 2013 focused on the legend of the spirit bear.609

6.4.2 Tourism and Registered Aboriginal Parties

As discussed above, the Victorian Government has introduced a system of Registered Aboriginal Parties (RAPs) that provide for traditional owners to play a central role in the management of Aboriginal heritage in their areas. The Committee heard evidence suggesting that RAPs could develop tourism ventures as an extension of their statutory responsibility for cultural heritage.

The Victorian Aboriginal Heritage Council argued that there is potential for RAPs to become involved in cultural heritage tourism as a means of generating revenue. At the same time, the Council was cautious about the capacity of RAPs to operate sustainable tourism ventures, highlighting that many Aboriginal organisations are concerned ‘about people being set up to fail’, without adequate support.610 In particular, Mr Harding identified the need for ‘capacity building’ in RAPs to support the establishment of sound business practices: ‘Whilst people might understand how to tell a story, they may not understand some strict business rules around OH&S and the other sorts of things that may impinge on a business’.611 Native Title Services Victoria also noted the potential for RAPs to become involved in tourism, but cautioned that ‘RAP funding and capacity is a clear obstacle for Traditional Owner organisations in developing and managing tourism operations’.612

---

610 Mr M Harding, Council Member, Victorian Aboriginal Heritage Council, Environment and Natural Resources Committee public hearing – Melbourne, 25 November 2013, transcript of evidence, p. 176.
611 Ibid., p. 176.
612 Native Title Services Victoria, submission no. 53, p. 11.
6.4.3 Partnerships and the sustainability of Aboriginal tourism ventures

The Committee heard about the difficulties faced by existing Aboriginal tourism ventures, including Brambuk Cultural Centre in the Grampians and Tower Hill Wildlife Reserve outside Warrnambool.

Brambuk is the result of a significant government investment through regional development funding and remains ‘the longest surviving totally Aboriginal-owned business in Australia’. At a public hearing in Halls Gap Mr Clark, CEO of Brambuk, outlined some of the issues facing Brambuk:

Since 2005 Brambuk and Parks Victoria have worked in partnership to provide services on site. This partnership contributes financially to the site. Due to budget cuts that Parks Victoria has incurred, this financial contribution will be changing significantly, putting Brambuk under major financial pressure and forcing us to review our operations. There is the distinct possibility we may reduce our offerings on site.

Mr Clark also noted that training staff was a time consuming part of Brambuk’s business: ‘Resources required in getting Aboriginal people, particularly young Aboriginal people, work ready are an issue’.

Mr Brett Cheatley argued that many Aboriginal tourism ventures need ongoing support, especially given that Aboriginal heritage is an important component of the tourism sector. At a public hearing in Melbourne Mr Cheatley argued that:

All businesses need support; they will not survive on their own. It requires continued subsidy, as do a lot of industries in this area. Aboriginal culture is critical to a lot of the success of developments.

The Committee heard about Aboriginal tourism ventures in Western Australia that are partnerships between local Aboriginal groups and developers. Mr Rod Quartermain, Manager, Policy and Tourism Branch, Department of Parks and Wildlife, explained that the government has encouraged partnerships between Aboriginal and non-Aboriginal organisations as part of the social impact component of developments in national parks under the Naturebank program.

Mr Quartermain explained that the involvement of Aboriginal people in tourism ventures was often included as part of assessing a proposal’s potential social and economic impact. For example:

---

613 Mr B Cheatley, Consultant, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 273.
614 Mr J Clark, Chief Executive Officer, Brambuk National Park and Cultural Centre, Environment and Natural Resources Committee public hearing – Halls Gap, 18 March 2014, transcript of evidence, p. 345.
615 Ibid., p. 345.
616 Mr B Cheatley, Consultant, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 273.
Social KPIs usually centre on things like employment of particularly Aboriginal people — employment training, ownership, part ownership of companies. KWA [Kimberley Wilderness Adventures] was an example which was 40 per cent owned by the local Aboriginal corporation and 60 per cent owned by APT — a good model, and it is building capacity in those areas.617

The Victorian Aboriginal Heritage Council also suggested that traditional owner groups could explore partnerships with non-Aboriginal businesses to support the sustainability of Aboriginal tourism ventures, arguing that:

Joint ventures between Traditional Owner organisations and others may minimise financial risk and enhance and increase the successfulness of enterprises on both sides.618

The Committee considers Aboriginal tourism an integral part of the state’s ecotourism and heritage tourism sectors, and supports the Victorian Government’s recent Aboriginal Tourism Strategy as a means for guiding the development of the area. The Committee is of the view that a showcase Aboriginal tourism destination is needed in regional Victoria.

The Committee has identified that such a centre would fill a gap in the market and that the Victorian Government should investigate establishing such a centre.

Accordingly the Committee recommends that:

**RECOMMENDATION 6.2**

The Victorian Government should investigate establishing a showcase Aboriginal tourism destination in regional Victoria, including preparing an appropriate business case.

The Committee is concerned that existing Aboriginal tourism businesses are supported to maximise their ability to attract visitors and operate in a financially sustainable manner. The Committee believes that the example of Canada’s Aboriginal Tourism Association of British Columbia illustrates the power of the coordinated marketing of Indigenous tourism products and the need to provide Aboriginal businesses with capacity building and product development advice. The organisation also demonstrates the importance of a long-term approach and the need to provide ongoing direction and support to ensure the development of a robust Aboriginal tourism sector.

Accordingly, the Committee recommends that:

---

617 Mr R Quartermain, Manager Policy and Tourism Branch, Department of Parks, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 256.
618 Victorian Aboriginal Heritage Council, submission no. 76, p. 2.
INQUIRY INTO HERITAGE TOURISM AND ECOTOURISM IN VICTORIA

RECOMMENDATION 6.3
Tourism Victoria supports both long-established and newly developed Aboriginal tourism ventures to develop ‘market ready’ tourism experiences and to effectively promote their tourism products.

- Tourism Victoria should explore ways to further highlight Aboriginal tourism within the agency’s online marketing materials, investigating the introduction of an Aboriginal tourism portal that supports the direct online booking of Aboriginal tourism experiences.

As discussed above, the Committee considers Registered Aboriginal Parties as key partners in the development of Victoria’s Aboriginal tourism sector. While the Committee acknowledges that RAPs need to prioritise their statutory responsibilities, there is potentially great benefit in building the capacity of RAPs to participate within the tourism sector. The Committee believes that it is important that the Victorian Government supports the development of the Aboriginal tourism sector, especially while it is at an early stage, and that this should include dedicated funding. As a result, the Committee recommends that:

RECOMMENDATION 6.4
The Victorian Government funds Tourism Victoria to work with the Victorian Aboriginal Heritage Council and appointed Registered Aboriginal Parties to support the development of Aboriginal tourism products and experiences throughout the state.

- In supporting Aboriginal tourism businesses there should be a focus on capacity building and workforce training.

6.5 Aboriginal tourism and accreditation
The Committee heard from Ecotourism Australia about their accreditation program for Indigenous tourism operators – Respecting Our Culture. At a public hearing in Melbourne Mr Rod Hillman, Ecotourism Australia CEO, explained the rationale behind the Respecting Our Culture accreditation program:

The purpose of that certification is for a tour operator to be able to demonstrate to their customers that they have engaged with the traditional owners in that area, they understand the stories, they understand the protocols in place, they know what stories they can tell and what stories they cannot tell. Like all our certification, it is a process. So many tour operators find this a very challenging area in terms of how to engage with traditional owners in the area, and this gives
them a process to walk through that is designed by Aboriginal people for non-Aboriginal people to do. 619

The program is offered by Ecotourism Australia as a stand-alone program, and is also packaged together with the organisation’s other eco-certification programs. 620

6.5.1 Cultural awareness in the Hawaiian tourism industry

As part of its study tour the Committee met with the Native Hawaiian Hospitality Association (NaHHA), which has developed training programs to increase the awareness of native Hawaiian culture in the tourism industry. Established in 1997, the NaHHA is a private non-profit association founded by a group of Native Hawaiian business professionals to address concerns about how Native Hawaiians and Hawaiian culture were perceived and represented in tourism. Since its inception NaHHA has formed alliances with various Hawaiian organisations and non-profits, artists and cultural practitioners, and with tourism associations, hotels and private businesses. 621

NaHHA administers the ‘Ola Hawaii’ program, a cultural training and education initiative for managers and staff in the hospitality industry who seek to have a better understanding of Hawaiian culture and traditions, and use this knowledge to strengthen their tourism business. 622

The work of NaHHA responds to a broader trend of visitors wanting a more in-depth experience of Native Hawaiian culture. NaHHA is a unique organisation that provides an interesting model for how to support relationships between Indigenous communities and the tourism sector.

While NaHHA notes that the industry has made progress in terms of incorporating Native Hawaiian culture into tourism experiences, there is a feeling that this is not occurring quickly enough. NaHHA has developed the Ola Hawaii program to guide organisations seeking a more complex engagement with Native Hawaiian culture. Central to this is the traditional notion of ‘aloha’ – which expresses a sentiment of unconditional welcome and hospitality. A number of major companies such as Hawaiian Airlines and Trump International have begun using this program to guide the development of their tourism products.

The Committee is aware that while Aboriginal Victorians are the custodians of their own heritage, many people within the Aboriginal community have no interest in working in the tourism sector. The development of the system of RAPs provides an opportunity for greater awareness and knowledge of Aboriginal cultural heritage, and RAPs themselves can act as a vital resource for tourism operators in how to approach the incorporation of Aboriginal histories or themes into tourism ventures. Regardless of whether Aboriginal people are directly involved in delivering a particular tourism experience, knowledge of Aboriginal heritage should be central to the way the tourism sector presents Victoria to visitors.

619 Mr R Hillman, Chief Executive, Ecotourism Australia, Environment and Natural Resources Committee public hearing – Melbourne, 7 November 2013, transcript of evidence, p. 107.
620 Ibid., p. 107.
In this way, the Committee recommends that:

**RECOMMENDATION 6.5**

Tourism Victoria works with the Victorian Aboriginal Heritage Council and appointed Registered Aboriginal Parties to increase awareness of Aboriginal heritage values within the tourism industry.

- Further, consideration should be given to the development of guidelines for the tourism industry to consult with Aboriginal people where Aboriginal heritage or stories are to be used in tourism products and ventures operated or delivered by non-Aboriginal people.
Chapter Seven

Victoria as a leader in ecotourism and heritage tourism

This chapter discusses how Victoria can become a leader in ecotourism and heritage tourism in Australia, and internationally. As such, this chapter addresses term of reference three, namely:

- Examining the potential for the development of ecotourism and heritage tourism in Victoria.

Chapter Seven focuses on three key initiatives designed to support the development of more integrated and engaging ecotourism and heritage tourism experiences, which are:

- The need to prioritise World Heritage listings for major sites, such as the Castlemaine Diggings National Park and the Budj Bim National Heritage Landscape;
- A strategy of tourism development that can successfully combine the potential of both the heritage tourism and ecotourism markets to maximise Victoria’s advantages, and the role of interpretation in such a strategy; and
- The importance of inter-agency and stakeholder collaboration in achieving the aim of making Victoria a leader in ecotourism and heritage tourism.

7.1. UNESCO World Heritage Listings

As mentioned in Chapter One, the Committee heard from a range of stakeholders who believed that Victoria has potential to have further sites listed on UNESCO’s World Heritage List. Currently, Victoria has one listed site – the Royal Exhibition Building and Carlton Gardens in Melbourne. Globally, there are 1007 sites on the World Heritage List, covering both natural and cultural heritage. The UNESCO Convention concerning the protection of World Cultural and Natural Heritage was adopted in 1972, and the first sites were inscribed on the World Heritage List in 1978. Sites are selected based on a range of criteria, including whether the site has outstanding natural or cultural heritage values, or architectural significance.623

Australia has 19 listings on the World Heritage List, including the multi-site Australian Convict Sites which covers a number of properties in Tasmania, Western Australia, New South Wales and Norfolk Island. Other sites on the list include the Great Barrier Reef, Uluru, Kakadu National Park,

Fraser Island, the Sydney Opera House and the Blue Mountains. UNESCO itself acknowledges the tourism potential of being listed, which can lead to:

An increase in public awareness of the site and of its outstanding values, thus also increasing the tourist activities at the site. When these are well planned for and organized respecting sustainable tourism principles, they can bring important funds to the site and to the local economy.\(^{624}\)

Broadly, the inquiry’s stakeholders were supportive of pursuing additional World Heritage Listings for Victoria, arguing that the listings are central to raising the international profile of destinations, leading to increased visitation. Commenting on the benefits of UNESCO status, Ms Kathryn Mackenzie, President of Cultural Tourism Victoria stated that:

One of the challenges we have in this busy world in which we live is to really break through the noise in an international standing. We know that cultural visitors come to Melbourne and spend a very short time. It is very difficult to bring them out to the regions when they have only allocated three days to Melbourne. They do not understand that there is anything else to see. I think that sort of listing would start to raise awareness of what you have in a state, and of course then people allocate more time to it. I think it is absolutely essential for Victoria to start doing that and Cultural Tourism Victoria would certainly back that.\(^{625}\)

At a public hearing in Hobart, Dr Bob Brown, former Senator and leader of the Greens Party, argued that ‘Victoria is missing out’ in terms of World Heritage.\(^{626}\) Dr Brown suggested that Victoria could pursue a listing for the Alpine National Park.\(^{627}\) Mr Brett Cheatley, a parks and planning consultant, was also confident of the tourism potential of World Heritage Listing, stating that: ‘world heritage does lead to increased visitation — there is no doubt about that. There is no doubt that people literally go around the world to tick off, “I have been to this world heritage site”’.\(^{628}\)

In response to concerns that World Heritage Listings can result in too many visitors through mass tourism — and eventually to the damage of heritage sites — Mr Cheatley argued that:

A lot of people talk about numbers in Australia. A place like Yosemite National Park has the population of Australia within its drive-to catchment. It is ridiculous that in Australia we talk about volume being difficult for the environment. It is never going to be the case. We are never going to have the sort of volume that is going to


\(^{625}\) Ms K Mackenzie, Chair and President, Cultural Tourism Victoria, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 282.


\(^{627}\) Ibid., p. 247.

\(^{628}\) Mr B Cheatley, Consultant, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 274.
absolutely destroy an asset, as long as it is well managed and planned — that is always the case — and maintained.\textsuperscript{629}

The Committee heard evidence relating to the possibility of applying for World Heritage Listing for the Castlemaine Diggings National Heritage Park. The Heritage Council of Victoria argued that listing for the area would ‘anchor the region as an international tourist destination’.\textsuperscript{630} Sovereign Hill was supportive of pursuing a listing for the Castlemaine Diggings as it would ‘position this unique region firmly into international markets which seek out these heritage tourism opportunities’.\textsuperscript{631} At a public hearing in Ballarat, Mr Joel Chadwick, Tourism Manager for the Central Goldfields Shire Council argued that the listing would put the area ‘on a global scale straightway. It would be a nationally and globally recognised area’.\textsuperscript{632}

The Victorian Goldfields Tourism Executive has been central in pursuing a regional approach to branding the Goldfields as a ‘cultural heritage region’ and views World Heritage Listing as an important part in achieving greater international visitation to the area. The Executive is a partnership between local government areas, tourism operators and industry stakeholders. In order to progress the listing of Castlemaine Diggings, Mr Chris Meddows-Taylor, Chairperson of the Executive, argued that a visitor interpretation centre should be created at the site.\textsuperscript{633} Mr George Sossi, Chief Executive Officer of Ballarat Regional Tourism, argued that the Goldfields could emulate the success of Mildura in leveraging off the listing of the Mungo National Park in neighbouring New South Wales. At a public hearing in Ballarat, Mr Sossi explained his experience with Mildura:

Any world heritage listing places a region on the map. I can give you an example from one of my previous postings in Mildura. Even though Mungo National Park is not in Victoria — it is in New South Wales — a city like Mildura leveraged off that world heritage listing and was able to get and still is getting today substantial international visitation. I think it is imperative going forward. It would really lift it to that bar.\textsuperscript{634}

Similarly, the Committee heard that the tourism industry in Cornwall in the United Kingdom, leveraged off the World Heritage Listing of the Cornwall and West Devon Mining Landscape, to create a wider mining heritage destination. Mr David Leathem, Manager, Economic Development and Tourism, Mount Alexander Shire Council argued that Cornwall offers a good comparison to what could happen in the Victorian Goldfields:

The gold rush saw the greatest peacetime migration of people in the history of the world. Once you start to understand that story and the branding of world heritage

\textsuperscript{629} Ibid., p. 274.
\textsuperscript{630} Heritage Council of Victoria, submission no. 16 (b), p. 2.
\textsuperscript{631} Sovereign Hill Museums Association, submission no. 18, p. 4.
\textsuperscript{632} Mr J Chadwick, Tourism Manager, Central Goldfields Shire Council, Environment and Natural Resources Committee public hearing – Ballarat, 8 October 2013, transcript of evidence, p. 20.
\textsuperscript{633} Mr C Meddows-Taylor, Chairperson, Victorian Goldfields Tourism Executive, Environment and Natural Resources Committee public hearing – Ballarat, 8 October 2013, transcript of evidence, p. 41.
\textsuperscript{634} Mr G Sossi, Chief Executive Officer, Ballarat Regional Tourism, and Member, Victorian Goldfields Tourism Executive, Environment and Natural Resources Committee public hearing – Ballarat, 8 October 2013, transcript of evidence, p. 43.
As discussed in Chapter Six, the Committee heard about the potential of securing World Heritage Listing for the Budj Bim National Heritage Landscape. The Victorian Government has committed to pursuing this listing as part of its new Aboriginal Tourism Strategy. The Committee is aware that the Victorian Government is currently working with the Australian Government to have the site included on Australia’s tentative list for World Heritage nominations.

The Committee also heard about the possibility of listing for the Grampians National Park. However, Mr Will Flamsteed, Chief Executive Officer of Grampians Tourism, cautioned that sites need to be well-developed with appropriate infrastructure prior to listing. In this way, he explained that:

World heritage with any level of formal interpretation does bring with it a structure that needs to be adhered to. I would want to be assured that we would be able to stand on our own two feet without world heritage listing prior to becoming world heritage listed; to have the systems set up that would allow us to manage visitor flow, product development, experienced management, as compared to just becoming world heritage listed if you know what I mean. I think there is a lot more behind it than just a listing.

Mr Jeremy Clark, Chief Executive Officer of the Brambuk Cultural Centre in the Grampians National Park, was also cautious about the benefits of pursuing a listing for the Grampians, although he acknowledged that it would be beneficial in terms of increasing heritage protection for sites within the park. The Committee believes that Victoria is disadvantaged compared to other Australian jurisdictions that have a number of UNESCO World Heritage sites.

The evidence suggests that World Heritage Listing is a driver of increased tourism, particularly in terms of international visitors who often look for UNESCO status as an indicator of quality ecotourism and heritage tourism experiences. However, the Committee acknowledges that sites must already be well-managed and possess appropriate supporting infrastructure, such as interpretation centres, prior to listing; listing on its own does not create a meaningful or engaging experience for visitors.

The Committee understands that significant work has been undertaken on preparing the ground for World Heritage applications for the Castlemaine Diggings National Heritage Park and the Budj Bim National Heritage Landscape. The Committee believes that listings for these sites would be a

635 Mr David Leathem, Manager, Economic Development and Tourism, Mount Alexander Shire Council, Environment and Natural Resources Committee public hearing – Ballarat, 8 October 2013, transcript of evidence, p. 15.
639 Mr J Clark, Chief Executive Officer, Brambuk National Park and Cultural Centre, Environment and Natural Resources Committee public hearing – Halls Gap, 18 March 2014, transcript of evidence, p. 347.
boon to tourism in regional Victoria and would increase the profile of the state as an ecotourism and heritage tourism destination.

Accordingly, the Committee recommends that:

**RECOMMENDATION 7.1**

The Victorian Government work with the Australian Government to pursue UNESCO World Heritage Listing for the Castlemaine Diggings National Heritage Park and the Budj Bim National Heritage Landscape.

- In addition, Tourism Victoria in conjunction with both Parks Victoria and Heritage Victoria, will develop a strategy to guide the identification of, and application process for, potential World Heritage sites within the state.

### 7.2. Bridging ecotourism and heritage tourism through inter-agency cooperation

As discussed throughout the report, the Committee views the ecotourism and heritage tourism sectors as having distinct and unique needs and characteristics. It is also aware that the sustainable and successful development of tourism in Victoria requires a more integrated strategic approach to the development of engaging natural and cultural heritage experiences. Both current and previous government tourism policies in Victoria have broadly recognised this principle. The Committee believes that in order to become a leader in ecotourism and heritage tourism in Australia and internationally, Victoria will need, over time, to develop a sophisticated strategic approach, one that can successfully combine ecotourism and heritage tourism products in new ways, without in any way diminishing their unique characteristics. In their submission the Heritage Council of Victoria discussed the views of Council member Keir Reeves, who argued that:

> The best-fit tourism policy for Victoria for the foreseeable future must combine ecotourism and cultural heritage tourism offerings in new ways that consolidate or develop existing tourism products. Secondly it is important to develop new tourism strategies and offerings that act as drivers of regional development throughout the state.640

The Committee heard from some stakeholders concerning the need to envisage tourism destinations as having multiple attractions and potential narratives. For example, Mr Leathem, Manager Economic Development and Tourism at Mount Alexander Shire Council told the inquiry that:

> When we look at, say, the Goldfields Track, the great attraction for that is that it is 210 kilometres of shared bushwalking and mountain biking track within an hour and a half of Melbourne. When you look at the other key mountain biking

---

640 Heritage Council of Victoria, submission no. 16, p. 5.
experiences that we have in Victoria, most of them are 3 or 4 hours away, in north-eastern Victoria or down to the Grampians and further. We see it as a great attraction. The other part of it is that it marries heritage and ecotourism beautifully. When you are mountain biking or walking the Goldfields Track, you are going right through the diggings as well, so it is providing a cultural experience as well as an outdoor and nature experience.\textsuperscript{641}

As mentioned in Chapter One, Tourism Victoria recently released \textit{Victoria’s Trails Strategy 2014-24}, which offers a whole-of-government approach to the development, maintenance and promotion of the state’s network of walking and riding trails. The strategy highlights the importance of delivering appropriate interpretation to users, noting that “through storytelling and interpretation, visitors gain knowledge and an appreciation of Victoria’s natural environment, culture and heritage.”\textsuperscript{642}

Similar views were expressed by Mr Roger Grant, Executive Officer, Geelong Otway Tourism. Mr Grant discussed the Australian National Landscapes program, and how this conservation program directs tourists to a wider understanding of national landscapes, one that involves both nature and heritage. He stated that:

\begin{quote}
... I think the broader concept is of most relevance. That is why I am really pleased that I have given you in your kits the information about the concept of national landscapes. I think the whole concept, again, is really worthy of being looked at. I am the chairman of the Great Ocean Road National Landscape. There are only three in Victoria: the Great Ocean Road, the Alps and the East Gippsland coastline around Croajingolong. They are the only three national landscapes. That was brought in to recognise from a tourism perspective and also a visitor perspective that you really should look at world heritage, which is about conservation value, as a guide to which are the best parks to experience. Again, it is a better understanding of the partnership between conservation and tourism, but it is also recognises that tourism is not just about the nature side; it is also about the heritage side.\textsuperscript{643}
\end{quote}

Mr Grant went on to discuss the development of the Great Ocean Road National Heritage Centre at Lorne, which tells the story of the construction of the Great Ocean Road. For Mr Grant, the Centre, which was due to open in 2014, provides a wonderful opportunity to connect history to the natural landscape, specifically through telling the story of the road’s construction by diggers post-World War One.\textsuperscript{644}

In his presentation to the Committee, parks and planning consultant Mr Cheatley, emphasised that Victoria was better placed than any other state — with spectacular and diverse natural assets and good access to public lands throughout the state — to grow the ecotourism and

\begin{footnotes}
\item[643] Mr R Grant, Executive Officer, Geelong Otway Tourism, Environment and Natural Resources Committee public hearing – Port Campbell, 25 October 2013, transcript of evidence, p. 58.
\item[644] Ibid., p. 58.
\end{footnotes}
heritage tourism sectors. Mr Cheatle provided the Committee with an overview of a public and private investment case for tourism development for the state, which would generate an estimated additional $4.4 billion in Gross State Product. He stated that:

Basically the investment case talks about three must-see nature-based tourism experiences, four iconic walks in Victoria, three major world-class experiences, five eco-lodges, more demand for tourist accommodation and four mountain biking centres, and talks about a path to action for government, of which some is already the case with the changes to leasing around the Forests Act, Crown Lands (Reserves) Act and the National Parks Act.645

As Chapter One of this report noted, one approach to ‘heritage’ in some jurisdictions internationally is to regard the whole landscape, and all of the built forms and human narratives derived from it, as comprising a country or a region’s heritage: a region can have multiple heritage values, which may be defined as ecological, historical, or cultural heritage values.646 In this model ‘heritage’ acts as an umbrella term that can encompass both ecotourism and heritage tourism.

The Committee does not see the need to move to a policy framework that would redefine heritage in Victoria in this manner. However, the Committee does see great value in adopting an approach that develops tourism destinations and experiences with an appreciation of our state’s ‘heritage’ in the broadest sense; i.e., an approach that recognises and interprets the many interconnected cultural and natural layers and multiple narratives that exist at key sites. The example of the Shipwreck Coast, with its layers of natural history, Indigenous history, colonisation, migration stories and shipping heritage, undoubtedly reflects this. With the development of the Great Ocean Walk, there is an outstanding opportunity to develop both ecotourism and heritage tourism products across the region, using digital technologies, and opening up the landscape to visitors; to offer more than wonderful views. Such an approach would have the visitor experience at its centre, and enriches that experience by a more holistic perspective.

One of the keys to successfully combining ecotourism and heritage tourism offerings ‘in new ways that consolidate or develop existing tourism products’, as mentioned above, is interpretation. From the evidence received by the Committee, it is clear that an integrated approach to tourism must also include the allied industries of hospitality and transport, and where appropriate, language services. However, without interpretative products and services key destinations are essentially being delivered without context, and as such do not offer the rich and rewarding experience that contemporary tourism, particularly international tourism, demands.

645 Mr B Cheatley, Consultant, Environment and Natural Resources Committee public hearing – Melbourne, 7 March 2014, transcript of evidence, p. 271.
As the Committee has come to understand, interpretation in the tourism context can take many forms, from state-of-the-art designed interpretation centres, to the delivery of smartphone apps that reveal the histories and stories of a place on a handheld device, to the personal delivery of stories by a trained guide, and to static signage replete with QR codes. Meaningful interpretation will also encompass both ‘good’ and ‘bad’ stories, i.e. will allow for unexpurgated accounts of events, places, and peoples; accounts that include positive stories alongside those with more difficult or even negative associations. An integrated approach to the development of key sites will involve an understanding that ecotourists and cultural heritage tourists are very often the same people, i.e. visitors who wish to immerse themselves in sustainable natural eco-experiences, and gain real insights and understandings of a destination’s cultural heritage. While investment attraction is clearly important to the development of this sector, so too is an understanding of the tourist market as it is emerging.

In regard to the state’s iconic tourism destinations and experiences, the Committee believes that these should be developed with an approach that involves a sophisticated understanding, and deployment of, the interpretation of a site or experience. This approach is technologically ‘smart’, combines ecotourism and heritage tourism values in an immersive experience, and reveals the multiple narratives that exist at a site, on a walk or during an experience. A cooperative approach is essential to improving the quality of interpretative material at Victoria’s tourism sites. Interagency cooperation will draw on the specialised expertise of each agency to offer visitors an integrated understanding of a site’s natural and cultural histories and values.

The Committee does not believe that a formal policy is needed to foster cooperation, but leadership will be required. As the principal public land manager in the state, Parks Victoria clearly has a lead role to play, as does the lead tourism agency, Tourism Victoria. Tourism Victoria and Parks Victoria will need to collaborate with other relevant agencies, such as Heritage Victoria, and the Victorian Aboriginal Heritage Council, and where appropriate, leaseholders, destination managers, and licensed tour operators. The Committee appreciates that there will always be visitors who prefer distinct ecotourism or heritage tourism experiences. However it recognises that in many instances combining aspects of ecotourism and heritage tourism through innovative interpretation can provide more nuanced and engaging experiences. Accordingly, the Committee recommends that:

**RECOMMENDATION 7.2**

In developing best practice models of interpretation for iconic destinations and experiences, Tourism Victoria and Parks Victoria will collaborate with, and draw upon the expertise of, other key agencies and stakeholders, such as Heritage Victoria, Regional Tourism Boards, and the Victorian Aboriginal Heritage Council. Where appropriate, collaboration will extend to leaseholders, destination managers, and licensed tour operators.

- Such an interpretive approach will combine ecotourism and heritage tourism in an immersive experience, offering visitors an integrated understanding of a site’s natural and cultural histories and values, including Indigenous heritage.
As already stated in this report, there is an infrastructure shortfall at many key destinations, which often includes a lack of interpretation infrastructure of any kind. For example, the Committee believes that an iconic destination such as the Shipwreck Coast definitely requires an interpretation ‘centre’, but is keen that such a centre be developed on a best practice model of interpretation. Such a centre would integrate understandings of ecology, Indigenous history, and immigration; would be delivered through sophisticated technologies and human interaction; and, would occur within a physical structure that is designed and constructed to the highest standards in sustainability.

The existence of two or three such interpretation centres across the state, based on established or developing iconic destinations, and delivering world’s best practice in interpretation and sustainability, will help give Victoria a leading edge as an ecotourism and heritage tourism destination. In Chapter Three the Committee recommended (Recommendation 3.2) that interpretation centres at iconic destinations should be appropriately maintained. Further, the Committee recommends that:

**RECOMMENDATION 7.3**

The Victorian Government will ensure that the development of interpretation centre infrastructure at iconic destinations — such as at the Shipwreck Coast — occurs on the basis of world’s best practice in interpretation and sustainability.

As discussed in Chapter Three, clear and informative signage is a key element of the tourism experience. Best practice indicates that tourist signage should also contribute to the interpretation of sites, through text as well as QR codes linking visitors to websites or smartphone apps and emerging technologies. Tourism Victoria already has a sophisticated tourism branding structure in the form of the Jigsaw campaign, which provides a framework for promoting both natural and cultural heritage attractions.

As part of achieving further integration between the ecotourism and heritage tourism sectors — and encouraging visitors to appreciate the diverse stories or ‘layers’ of key destinations and attractions — the current Jigsaw campaign could be extended to include signposting for the state’s ‘must-see’ iconic sites. The Jigsaw campaign could also include the development of a suite of digital interpretation materials, such as a smartphone app, which can offer visitors a way to engage more deeply with Victoria’s major attractions and would appeal to visitors interested in both ecotourism and heritage tourism. Accordingly, the Committee recommends that:

**RECOMMENDATION 7.4**

As part of an integrated thematic approach to interpreting and promoting natural and cultural heritage sites, Tourism Victoria will consider developing branding to include signposting for the state’s ‘must-see’ iconic sites, in conjunction with the development of a suite of complimentary digital interpretative materials, such as a smartphone app.
## Appendix One

### List of submissions

<table>
<thead>
<tr>
<th></th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Noel Orval</td>
</tr>
<tr>
<td>2</td>
<td>City of Greater Dandenong</td>
</tr>
<tr>
<td>3</td>
<td>Commissioner for Environmental Sustainability Victoria</td>
</tr>
<tr>
<td>4</td>
<td>Central Goldfields Shire Council</td>
</tr>
<tr>
<td>5</td>
<td>Wimmera Development Association</td>
</tr>
<tr>
<td>6</td>
<td>City of Melbourne</td>
</tr>
<tr>
<td>7</td>
<td>Mordialloc Beaumaris Conservation League</td>
</tr>
<tr>
<td>8</td>
<td>Golden Plains Shire Council</td>
</tr>
<tr>
<td>9</td>
<td>Goulburn River Valley Tourism</td>
</tr>
<tr>
<td>10</td>
<td>Horsham Rural City Council</td>
</tr>
<tr>
<td>11</td>
<td>Melbourne Water</td>
</tr>
<tr>
<td>12</td>
<td>Wellington Shire Council</td>
</tr>
<tr>
<td>13</td>
<td>Business &amp; Tourism East Gippsland Inc.</td>
</tr>
<tr>
<td>14</td>
<td>Tom Tootell</td>
</tr>
<tr>
<td>15</td>
<td>Ecotourism Australia</td>
</tr>
<tr>
<td>16</td>
<td>Heritage Council of Victoria</td>
</tr>
<tr>
<td>17</td>
<td>Peter Johnstone</td>
</tr>
<tr>
<td>18</td>
<td>The Sovereign Hill Museums Association</td>
</tr>
<tr>
<td>19</td>
<td>Murrindindi Shire Council</td>
</tr>
<tr>
<td>20</td>
<td>Nillumbik Shire Council</td>
</tr>
<tr>
<td>21</td>
<td>Historic Buildings Restoration Committee (Inc)</td>
</tr>
<tr>
<td>22</td>
<td>Museum Victoria</td>
</tr>
<tr>
<td>23</td>
<td>Geoff Mosley</td>
</tr>
<tr>
<td>24</td>
<td>Glenelg Shire Council</td>
</tr>
<tr>
<td>25</td>
<td>Destination Phillip Island Regional Tourism Board</td>
</tr>
<tr>
<td>26</td>
<td>Tourism Victoria</td>
</tr>
<tr>
<td>27</td>
<td>Mountain Cattlemen's Association Victoria Inc.</td>
</tr>
<tr>
<td>28</td>
<td>Gannawarra Shire Council</td>
</tr>
<tr>
<td></td>
<td>Association of Tourist Railways, Victoria</td>
</tr>
<tr>
<td>---</td>
<td>-------------------------------------------</td>
</tr>
<tr>
<td>30</td>
<td>Jenny Warfe</td>
</tr>
<tr>
<td>31</td>
<td>Environment East Gippsland Inc.</td>
</tr>
<tr>
<td>32</td>
<td>Taariq Hassan</td>
</tr>
<tr>
<td>33</td>
<td>Anna Burns</td>
</tr>
<tr>
<td>34</td>
<td>Jeremy Woolhouse</td>
</tr>
<tr>
<td>35</td>
<td>Prue and Tony Sheer (Cape Schanck Lighthouse)</td>
</tr>
<tr>
<td>36</td>
<td>Andrew Watkins</td>
</tr>
<tr>
<td>37</td>
<td>Jason Doyle</td>
</tr>
<tr>
<td>38</td>
<td>Tourism North East</td>
</tr>
<tr>
<td>39</td>
<td>Margaret Sietsma</td>
</tr>
<tr>
<td>40</td>
<td>Australia ICOMOS</td>
</tr>
<tr>
<td>41</td>
<td>Bruce Gall</td>
</tr>
<tr>
<td>42</td>
<td>Lou Baxter</td>
</tr>
<tr>
<td>43</td>
<td>City of Port Phillip</td>
</tr>
<tr>
<td>44</td>
<td>Port Phillip EcoCentre Inc.</td>
</tr>
<tr>
<td>45</td>
<td>Mansfield Shire Council</td>
</tr>
<tr>
<td>46</td>
<td>Baw Baw Shire Council</td>
</tr>
<tr>
<td>47</td>
<td>Terry Lowater</td>
</tr>
<tr>
<td>48</td>
<td>Western Port Biosphere Reserve</td>
</tr>
<tr>
<td>49</td>
<td>Western Melbourne Tourism Inc.</td>
</tr>
<tr>
<td>50</td>
<td>MELTours</td>
</tr>
<tr>
<td>51</td>
<td>Assoc. Prof. Stephen L Wearing</td>
</tr>
<tr>
<td>52</td>
<td>Gippsland Plains Rail Trail Committee of Management</td>
</tr>
<tr>
<td>53</td>
<td>Native Title Services Victoria</td>
</tr>
<tr>
<td>54</td>
<td>Corangamite Shire Council</td>
</tr>
<tr>
<td>55</td>
<td>Destination Gippsland Limited</td>
</tr>
<tr>
<td>56</td>
<td>Field &amp; Game Australia Inc.</td>
</tr>
<tr>
<td>57</td>
<td>Bothfeet</td>
</tr>
<tr>
<td>58</td>
<td>Museums Australia (Victoria)</td>
</tr>
<tr>
<td>59</td>
<td>Yarra Ranges Council</td>
</tr>
<tr>
<td>60</td>
<td>Flagstaff Hill Maritime Village</td>
</tr>
<tr>
<td>61</td>
<td>Seaworks Foundation</td>
</tr>
<tr>
<td>62</td>
<td>Mildura Tourism Inc.</td>
</tr>
<tr>
<td>63</td>
<td>Victorian Goldfields Tourism Executive</td>
</tr>
<tr>
<td>No.</td>
<td>Submission</td>
</tr>
<tr>
<td>-----</td>
<td>-------------------------------------------------</td>
</tr>
<tr>
<td>64</td>
<td>Victoria Tourism Industry Council</td>
</tr>
<tr>
<td>65</td>
<td>Cultural Tourism Victoria</td>
</tr>
<tr>
<td>66</td>
<td>Mount Alexander Shire Council</td>
</tr>
<tr>
<td>67</td>
<td>Victorian National Parks Association</td>
</tr>
<tr>
<td>68</td>
<td>Phillip Island Nature Parks</td>
</tr>
<tr>
<td>69</td>
<td>Indigo Shire Council</td>
</tr>
<tr>
<td>70</td>
<td>The National Trust of Australia (Victoria)</td>
</tr>
<tr>
<td>71</td>
<td>Parks Victoria</td>
</tr>
<tr>
<td>72</td>
<td>David Witham</td>
</tr>
<tr>
<td>73</td>
<td>Lex Chalmers</td>
</tr>
<tr>
<td>74</td>
<td>RailTrails Australia</td>
</tr>
<tr>
<td>75</td>
<td>Grampians Tourism</td>
</tr>
<tr>
<td>76</td>
<td>Victorian Aboriginal Heritage Council</td>
</tr>
<tr>
<td>77</td>
<td>Geelong Otway Tourism Inc.</td>
</tr>
<tr>
<td>78</td>
<td>Peter Berlyn</td>
</tr>
<tr>
<td>79</td>
<td>Not available</td>
</tr>
<tr>
<td>80</td>
<td>Department of Environment and Primary Industries</td>
</tr>
<tr>
<td>81</td>
<td>Museum of Australian Democracy at Eureka (M.A.D.E.)</td>
</tr>
<tr>
<td>82</td>
<td>Not available</td>
</tr>
<tr>
<td>83</td>
<td>Port Campbell Community Group Inc.</td>
</tr>
<tr>
<td>84</td>
<td>Lakeside Alpine Resort</td>
</tr>
<tr>
<td>85</td>
<td>Wildlife Coast Cruises Pty Ltd</td>
</tr>
<tr>
<td>86</td>
<td>East Gippsland Shire Council</td>
</tr>
<tr>
<td>87</td>
<td>Port of Sale Heritage Cruises Pty Ltd</td>
</tr>
<tr>
<td>88</td>
<td>Australian Aircraft Restoration Group</td>
</tr>
<tr>
<td>89</td>
<td>Gippsland Lakes Ministerial Advisory Committee</td>
</tr>
<tr>
<td>90</td>
<td>John Saxon and Jane Robinson</td>
</tr>
<tr>
<td>91</td>
<td>Hanging Rock Action Group</td>
</tr>
<tr>
<td>92</td>
<td>Prospectors and Miners Association of Victoria</td>
</tr>
</tbody>
</table>
Appendix Two

List of public hearings

8 OCTOBER 2013 – BALLARAT

City of Ballarat
Ms S Fayad, Co-ordinator Heritage

Mount Alexander Shire Council
Mr D Leathem, Manager, Economic Development and Tourism

Central Goldfields Shire Council
Mr J Chadwick, Tourism Manager, Central Goldfields Shire Council

Sovereign Hill
Mr J Johnson, Chief Executive Officer

Community Tourism Representatives
Ms F Barkla, Maryborough, Tourism Operator
Ms M Kau, Talbot, Tourism Operator
Mr M Kau, Talbot, Tourism Operator
Mr A Stoneman, Carisbrook, Tourism Operator

Victorian Goldfields Tourism Executive
Mr C Meddows-Taylor, Chairperson, Victorian Goldfields Tourism Executive
Mr G Sossi, Chief Executive Officer, Ballarat Regional Tourism

25 OCTOBER 2013 – PORT CAMPBELL

Corangamite Shire Council
Mr I Gibb, Director, Sustainable Development
Ms M Dougherty, Planning Officer

Geelong Otway Tourism
Mr R Grant, Executive Officer
Bothfeet Walking Lodge
Mr G Ronan, Owner

Flagstaff Hill Maritime Village
Mr P Abbott, Manager, Tourism Services

Shipwreck Coast Tourism
Ms C Reid, Executive Officer

Ms L Chalmers

7 NOVEMBER 2013 – MELBOURNE

Tourism Victoria
Mr J Dalton, Acting Chief Executive
Ms C White, Group Manager, Product Marketing

Parks Victoria
Mr I Walker, General Manager, Environment and Heritage
Mr I Christie, General Manager, Visitors and Community
Ms A Brandenburg, Manager, Tourism, Parks Victoria

Ecotourism Australia
Mr R Hillman, Chief Executive

Destination Phillip Island and Phillip Island Nature Parks
Ms K Storey, General Manager, Destination Phillip Island
Dr R Jessop, Environment Manager, Phillip Island Nature Parks

Victorian National Parks Association
Mr M Ruchel, Executive Director
Mr P Ingamells, Park Protection Officer

Seaworks Foundation
Mr T Huggard, Chairperson
Mr C Bramich, Board Member
Ms G Smith, Board Member
25 NOVEMBER 2013 – MELBOURNE

National Trust of Australia – Victoria
Mr M Purslow, Chief Executive Officer

Victoria Tourism Industry Council
Ms D Smith, Chief Executive
Ms L Hatton, Policy Manager

Yarra Ranges Shire Council
Councillor S Dunn
Mr L Zarro, Economic Development Officer

Australia International Council on Monuments and Sites (ICOMOS)
Ms L Gervasoni, Victorian Committee Member
Mr I Wight, Victorian Representative

Association of Tourist Railways and Public Transport Victoria
Mr P Kamay, President, Association of Tourist Railways
Mr A Ponton, Registrar, Tourist and Heritage Railways, Public Transport Victoria

Department of Environment and Primary Industries
Mr P Beaumont, Executive Director, Land Management Policy

Victorian Aboriginal Heritage Council
Mr R Carter, Chair
Mr M Harding, Council Member

5 DECEMBER 2013 – EAST GIPPSLAND

East Gippsland Shire Council
Mr P Rickards, Tourism Coordinator
Mr P Holton, Director, Development
Ms A Court, Arts and Culture Coordinator
Mr T Ellis, Major Projects and Economic Development Manager
Sea Safari on Lakes Explorer
Mr P Johnstone, Owner and Operator

Destination Gippsland
Mr T Robinson, Chief Executive Officer

Gippsland Plains Rail Trail
Ms H Hoppner, Chairperson
Mr A Lewis, Marketing and Promotion

Port of Sale Heritage Cruises
Mr A Lewis
Ms R Lewis

Friends of the Horseshoe Bend Tunnel
Mr T Lowater
Ms D Lowater

Gippsland Lakes Ministerial Advisory Committee
Mr M Richardson, Executive Officer

13 FEBRUARY 2014 – HOBART
Tasmanian Parks and Wildlife Service
Mr J Lennox, Director Visitor Services

Tourism Tasmania
Ms G Parssey, Manager, Tourism Product and Planning

Dr Bob Brown

7 MARCH 2014 – MELBOURNE
Department of Parks and Wildlife (Western Australia)
Mr R Quartermain, Manager, Policy and Tourism Branch

Lakeside Alpine Resort
Mr N Veltjens
Mr J Martin

Consultant
Mr B Cheatley (formerly of Parks Victoria)

Cultural Tourism Victoria and Victoria Tourism Industry Council
Ms K Mackenzie, Chair and President, Cultural Tourism Victoria
Ms L Hatton, Policy Manager, Victoria Tourism Industry Council

Western Melbourne Tourism and Leadwest
Mr R Ponsford, Executive Officer, Western Melbourne Tourism
Mr C Rowley, Chief Executive Officer, Leadwest

Baw Baw Shire Council and Walhalla and Mountain Rivers Tourism Association
Mr P Kulich, Economic Development Coordinator, Baw Baw Shire Council
Mr M Leaney, President, Walhalla and Mountain Rivers Tourism Association

Australian Aircraft Restoration Group
Mr M Pilkington, Vice-Chairman, Special Projects

Heritage Council of Victoria
Ms P Hitchins, Project Officer
Ms E Russell, Historian

18 MARCH 2014 – GRAMPIANS

Grampians Tourism
Mr W Flamsteed, Chief Executive Officer

Horsham Rural City Council
Mr C McClure, Manager, Tourism and Events
Mr C Kemp, Manager, Economic and Business Development

Wimmera Development Association
Ms J Bourke, Executive Director

Northern Grampians Shire Council
Mr J Nolan, Director, Economic and Community
Brambuk National Park and Cultural Centre
Mr J Clark, Chief Executive Officer

21 MARCH 2014 – MANSFIELD

Mansfield Shire Council
Ms J Dixon, Deputy Manager, Tourism and Economic Development
Councillor R Bate

Tourism North East
Ms S Quon, Chief Executive Officer

Mountain Cattlemen’s Association of Victoria
Mr G Stoney, Coordinator, High Country Digital Project

Goulburn River Valley Tourism
Ms W Jones, Chief Executive Officer

Murrindindi Shire Council
Mr B Elkington, Manager, Economic Development, Events and Tourism

Watson’s Mountain Country Trail Rides and Adventure Victoria
Mr M Watson, Operator
Appendix Three

List of briefings and site inspections

VICTORIAN BRIEFINGS AND SITE INSPECTIONS

7 – 8 OCTOBER 2013 – BALLARAT AND CASTLEMAINE

Site inspections and briefings
The Committee conducted site inspections and had briefings at the following:

- Sovereign Hill
- Museum of Australian Democracy at Eureka
- Castlemaine Diggings National Heritage Park

23 OCTOBER 2013 – WARRNAMBOOL AND PORT CAMPBELL

Site inspections and briefings
The Committee conducted site inspections and had briefings at the following:

- Flagstaff Hill Maritime Village and Shipwreck Coast Visitors Centre
- Worn Gundidj Visitor Centre - Tower Hill Wildlife Reserve
- Bothfeet Walking Lodge – Johanna
- Port Campbell National Park
  - Parks Victoria briefed the Committee on the Shipwreck Coast Region Master Plan

6 NOVEMBER 2013 – POINT NEPEAN/ST KILDA

Site inspections and briefings
The Committee conducted site inspections and had briefings at the following:

- Point Nepean National Park
  - Parks Victoria briefed the Committee on the Point Nepean Master Plan
- The Port Phillip EcoCentre
4 DECEMBER 2013 – EAST GIPPSLAND
Site inspections and briefings
The Committee conducted site inspections and had briefings at the following:
- Cape Conran Coastal Park
- Buchan Caves Reserve
- East Gippsland Rail Trail
- Lakes Entrance/Sea Safari Eco-tours

17 MARCH 2014 – GRAMPIANS
Site inspections and briefings
The Committee conducted site inspections and had briefings at the following:
- Brambuk Cultural Centre
- Grampians - Gariwerd National Park

20 MARCH 2014 – MANSFIELD
Site inspections and briefings
The Committee conducted site inspections and had briefings at the following:
- Alpine National Park
- Bluff Hutt

INTERSTATE SITE INSPECTIONS AND BRIEFINGS

9-13 JANUARY 2014 – TASMANIA
Site inspections and briefings
The Committee conducted site inspections and had briefings at the following:
- Waldheim Cabins
- Cradle Mountain/Lake St Clair National Park
  - Parks and Wildlife Tasmania briefed the Committee on the Overland Track
- Oatlands Tour
- Heritage Walking Tour Hobart
- Port Arthur Tour
NORTH AMERICAN STUDY TRIP

31 JULY – 15 AUGUST – UNITED STATES AND CANADA

Site inspections

The Committee conducted site inspections at:

- Waimea Valley
- Iolani Palace
- World War II Valor in the Pacific National Monument
- Hawaii Volcanoes National Park
- British Columbia Parks
- Sea to Sky Gondola
- Klahowya Village at Stanley Park
- Takaya Tours
- Butchart Gardens
- Emily Carr House
- Alcatraz Island
- Crissy Field Center (Golden Gate National Parks Conservancy)
- Fort Baker (Golden Gate National Recreation Area)
- Muir Woods National Monument
- Hass-Lilienthal House
- The Presidio Trust
- Bay Area Green Tours

Briefings

The Committee received briefings from:

- Hawaii Ecotourism Association
- Native Hawaiian Hospitality Association
- Hawaii Tourism Authority
- Ministry of Jobs Tourism and Skills Training British Columbia
- GreenStep Solutions (Canada) and Green Business Scheme (UK)
- Australian Consulate (Vancouver)
- Aboriginal Tourism Association of British Columbia
- Heritage Branch, Ministry of Forests, Land and Natural Resources, British Columbia
- Tartan Group and Adventure Travel Trade Association
- Heritage Tourism Alliance of British Columbia
- Golden Gate Parks Conservancy
- San Francisco Architectural Heritage
Bibliography


Tourism Australia (2011) 2020 Summary of Tourism Australia’s China 2020 Strategic Plan, Tourism Australia, Australian Government, Canberra.
Tourism Australia (2012) *2020 Summary of Tourism Australia’s India Strategic Plan*, Tourism Australia, Australian Government, Canberra.


Tourism Western Australia (2011) *Naturebank – Extraordinary Ecotourism Development Opportunities in Western Australia*, Government of Western Australia.


