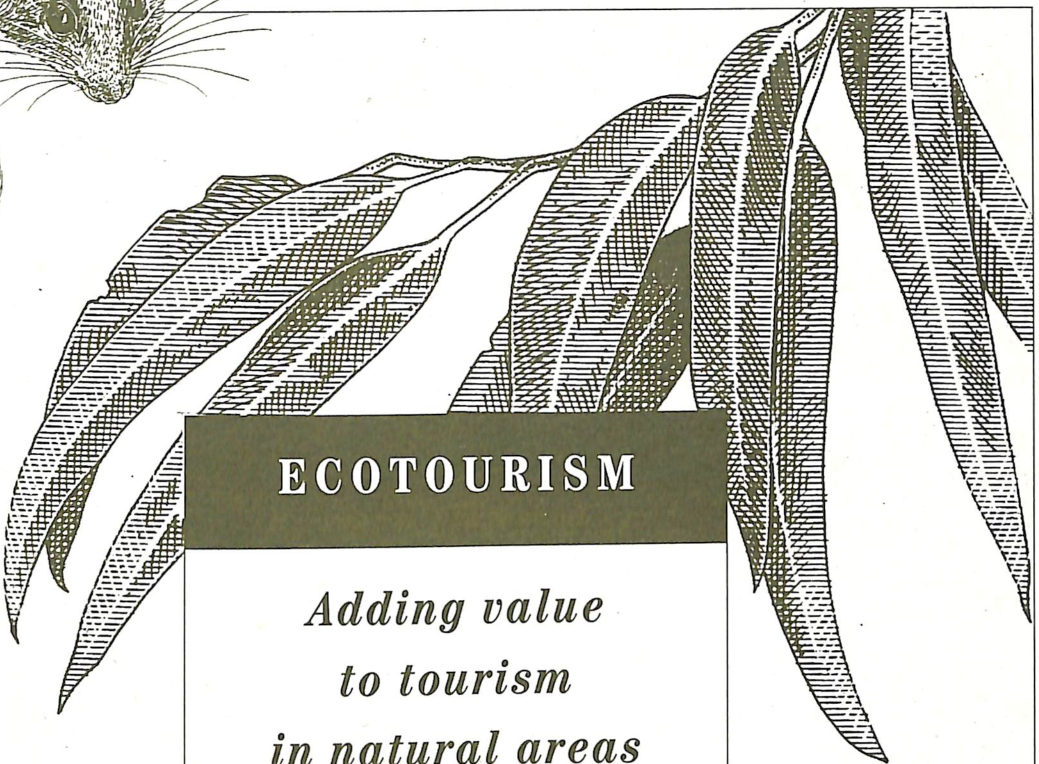
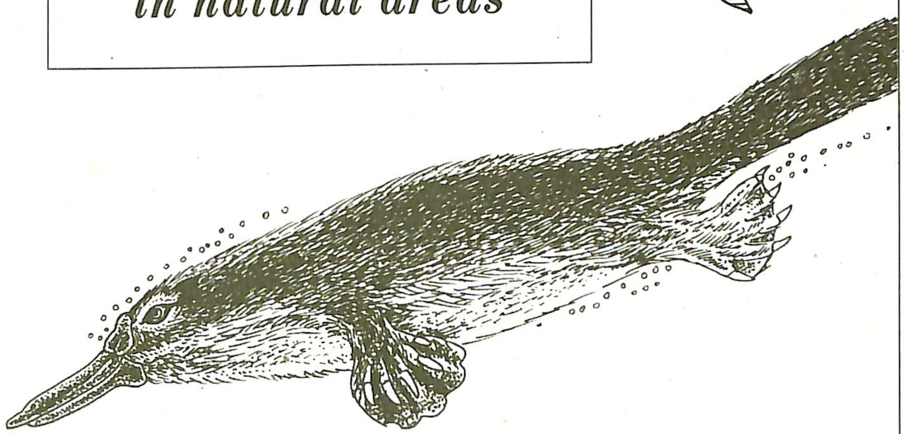


ECOTOURISM

Adding value to tourism in natural areas



TASMANIA

DEPARTMENT OF TOURISM, SPORT AND RECREATION

A DISCUSSION PAPER ON NATURE BASED TOURISM JULY 1994

Foreword

Tasmania's natural environment is one of the main reasons why people visit the state. The accessibility of our natural areas together with the extent and quality of the Wilderness World Heritage Area are attractions which many visitors enjoy and appreciate.

Increasingly, these visitors are seeking experiences which enable them to learn about nature and explore the natural environment. This form of travel, together with the recognition that all tourism must be ecologically sustainable, has given rise to a phenomenon called ecotourism.

However, there has been much debate about what ecotourism is. This paper will define ecotourism and consider the issues which must be addressed for this form of tourism is to be developed in Tasmania. It also examines the relationship between ecotourism and other forms of nature based tourism.

The paper is the first step in creating a nature based tourism strategy for the State. It will be developed as part of a Tourism Industry Development Plan which recognises that it is the combination of the state's accessible natural environment together with its lifestyle, cultural heritage and quality products which distinguishes Tasmania from other destinations.

This plan will set out how we can move forward to increase the value and viability of the tourism industry in Tasmania. This growth depends on how we use the resouces upon which the industry is dependent.

Tourism can be a positive force to meet the needs of visitors and the community, and to protect the environment. Our challenge is to ensure that tourism delivers enhanced benefits in all areas. This delivery can only occur in partnership with the industry, the resource managers and the community, and I invite your participation in this process.

Written comment on this paper is welcomed and a workshop will be held in September 1994 to discuss how we can can develop a strategy for nature based tourism in this State.

Please forward written comments and registrations of interest for the workshop to:

Jane Foley
Senior Planning Consultant Natural Areas
Department of Tourism, Sport and Recreation
GPO Box 399 Hobart TAS 7000
Facsimile: (002) 30 8355 Telephone (002) 30 8352

by 12th September 1994.

R.W. J. Morris

RWJ Morris

Secretary, Department of Tourism, Sport and Recreation

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Introduction 1

Tasmania and Ecotourism

Tasmania's natural strengths place the State in a prime position to develop as one of Australia's top ecotourism destinations. But what does ecotourism mean? How can this form of tourism be developed in Tasmania?

This paper will define ecotourism, identify Tasmania's strengths and weaknesses, examine the current state of the industry and raise issues which must be addressed if the potential of this sector of the industry is to be realised. It will also go beyond looking at ecotourism and examine the broader question of tourism in natural areas.

Why Broaden the Focus?

Over half the tourists to this State visit natural areas. While some of these visitors may define themselves as ecotourists, others have different interests and motivations. Yet the resource managers have to cater for all uses which requires an integrated approach to the provision of visitor services in natural areas.

From an industry point of view, visitor access to natural areas is fundamental to our product. Our parks, forests and wilderness areas draw people to Tasmania. While a small number of visitors use the services of special interest tour operators, the majority of tourists travel independently, visiting natural areas, utilising the accommodation, restaurants, transport and other services of a wide range of operators. All of these players can make a contribution to the development of this sector of the industry.

Ecotourism has the potential to enhance the value of tourism to the economy as well as visitor experiences in natural areas. It can be used as a positive force to assist with the conservation of the resource.

Applying the Principles to Tourism in Natural Areas

We agree with some commentators that ecotourism principles have the potential to be applied to all tourism.

We realise that there are some risks in broadening the scope but we need to explore the connections between ecotourism and other forms of nature related tourism before focusing on specific strategies.

The Process

The strategy is being developed as part of a Tasmanian Tourism Industry Development Plan.

This paper is the first step in developing a strategy. It has built on the work that has already been done by other states, industry associations and conservation groups. In particular we have drawn on the National Ecotourism Strategy (March 1994), Victorian Ecotourism Strategy (1992), Pacific Asia Travel Association paper on Endemic Tourism (1992), South Australian Ecotourism Project and the many papers which were published on sustainable tourism in 1991-92. We recommend that you refer to these sources for further information.

> *"Ecotourism can act as a role model for the ecologically sustainable development of all tourism."*
> **National Ecotourism Strategy 1994**

A number of projects are currently being completed which will provide valuable information on the state of the industry and the market. They include a statewide industry survey, a forest tourism policy, a backpackers survey, a statewide interpretation strategy and a cultural tourism paper. This information will be fed into the process as it becomes available.

We invite you to comment on this nature based tourism paper and to register for a workshop to be held to discuss the issues and strategies. Following consultation, strategies will be developed and made available for public comment before the final Industry Development Plan is released.

Timescale

August 1994	Release of Discussion paper
August/ September 1994	Written Comment
September 1994	Workshop
October 1994	Release of Draft Strategy Written comment
November 1994	Final strategy to be released as part of a Tasmanian Industry Development Plan

Tourism and the Economy

Tourism is one of the world's largest and fastest growing industries. It is a core industry in state, national and world economies.

In 1991/92 tourism contributed $26 billion to the Australian economy.

The latest figures from the Centre for Regional and Economic Analysis(CREA) show that in 1992 the Tasmanian industry employed 9.1% of the workforce as compared to 7.7% in 1986. The total travel expenditure within the state was estimated at $688 million compared to $347 million in 1986.

Growth Potential

Tourism is also a major industry for Tasmania and yet it currently only attracts 2% and 4% of the international and domestic markets respectively.

The prediction is that Tasmania will follow the national trend of averaging a growth rate of 8% annually for international tourism and a 2% growth rate for domestic tourism. In 1993, it had an overall growth rate of 5%. The challenge is to sustain this level of growth and at the same time increase visitor expenditure.

Ecotourism offers the opportunity to develop existing product and create new products for markets which Tasmania is currently not attracting. It has the potential to add significant value to the economy.

Tourism and the Environment

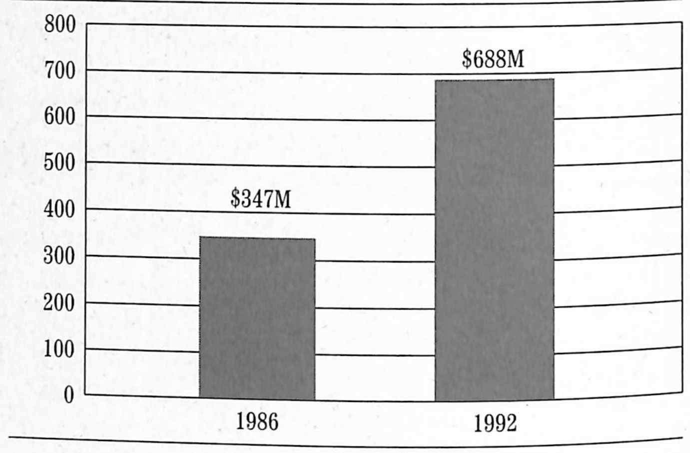
While countries have welcomed the economic benefits of tourism, there has been growing concern about the negative impacts of tourism on the environment and host communities.

This concern has lead to the recognition that the future of the industry is directly dependent on how the environment is used for tourism.

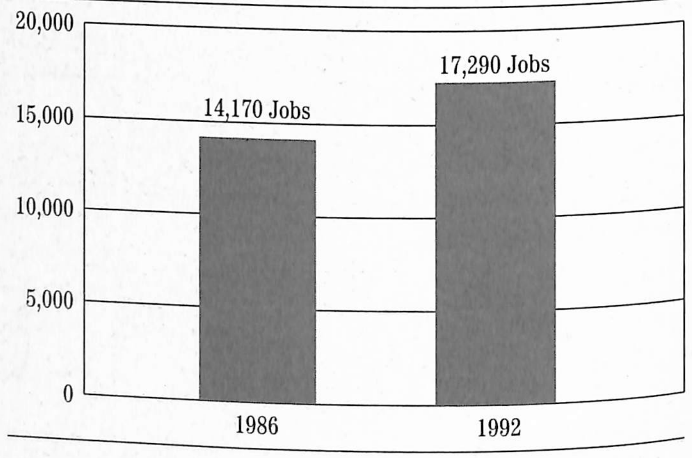
The interdependence of tourism and the environment is fundamental to its future.... it is obvious that ecologically sustainable tourism is essential for the long term profitability of the industry

Pacific Asia Travel Association
Endemic Tourism Paper 1992

CREA - Total Travel Expenditure 1992



CREA - Employment Generated 1992



While the principles of ecologically sustainable development (ESD) become written into law (Tasmanian State Planning legislation 1993) and the industry develops codes of practice (ATIA Code of Environmental Practice; PATA Code for Environmentally Responsible Tourism) the challenge is to implement these principles. Tasmania is leading Australia with its planning legislation, and the State's Parks and Wildlife Service has been at the forefront of developing minimal impact codes for walking, boating and other activities.

"In 1993 travel and tourism will contribute 6% of the world input, 1 in 15 jobs and 7% of all capital investment. To governments looking to rekindle growth and stimulate jobs it offers substantial possibilities"

Sir Frank Moore
Australian Tourism Industry Association 1993

There is a growing recognition of the positive benefits tourism can have on the environment. Ecotourism is seen as a way of enabling people to enjoy, understand and appreciate the environment and as a result encourage a greater commitment to the conservation to finite resources.

The Changing Consumer

The proportion of relatively well educated people with significant disposable income and a propensity to travel has grown. These travellers are seeking authentic experiences which incorporate learning and a sense of discovery.

They have gone beyond "collecting countries", and want to experience the country, meet the people and gain a real insight into the local culture. They are looking for experiences which will satisfy emotions and stimulate the mind.

The "greening" of the world's environmental consciousness is being reflected in consumers choice of product. These travellers are environmentally aware and they expect certain standards to be adhered to.

Ecotourism is growing in response to these interests and the demand for responsible and sustainable tourism.

Culture and Tourism

Culture is an integral part of the natural landscape, be it the heritage of people going back many thousand of years or the stories of today. This paper will consider culture as it relates to natural areas and the strength of being able to access other experiences - historic towns, fine foods - so close to nature. Culture is part of nature based tourism.

However it will not be examining in any depth the significance and potential of Tasmania's cultural tourism outside of natural areas. This sector of the industry is addressed in a separate paper as part of the overall Tasmanian Tourism Industry Development Plan.

Questions

At the end of each section there are a series of questions that we ask you to address in providing comment on this paper. This information will be fed into the process for developing the strategy.

What is your vision for tourism as an industry in Tasmania in the year 2000?

How will the balance between use of the environment for tourism and its conservation be achieved?

Who will be the target markets and what will be their interests?

What is Ecotourism?

Hector Ceballos Lascurian has been credited with first using the term in 1983. He defined ecotourism as:

Travelling to relatively undisturbed or uncontaminated natural areas with the specific objective of studying, admiring, and enjoying the scenery and its wild plants, as well as any existing cultural manifestations (both past and present) found in these areas.

This definition places an emphasis on education, appreciation and travel to undisturbed areas. Many subsequent definitions have included these principles and added conservation, ecological sustainability and contribution to the well being of local communities.

Key Characteristics

From these definitions a number of key characteristics can be identified:

- **Natural Area Base**
  The use of natural areas is the base of this form of tourism. The cultural values of these areas are an integral part of the site and its interpretation.
- **Ecological Sustainability**
  Ecotourism must be compatible with and supportive of the ecologically sustainable use of the area.
- **Education and Interpretation**
  An appropriate level of information, interpretation and education must be provided.
- **Benefits for Conservation, Community and the Economy**
  There should be a net benefit to the community and the environment in terms of sustaining the local culture, contributing to the local economy and the conserving the natural resource.

The Continuing Debate

On the face of it acceptance or rejection of these principles should be straight forward. Operators and consumers should be able to clearly identify whether there is an appropriate match. So why has the great debate on what ecotourism is or is not continued.

The answer can in part be found in how Hector Ceballos Lascurian describes ecotourism ten years on from when he initiated the debate. In a paper written for the United Nations World Tourism Organisation in 1993 he describes ecotourism as:

A phenomenon composed of a spectrum of options, ranging from a hard core, scientific approach to a visit to a natural area as a weekend activity or as part of a broader trip.

As the debate on ecotourism stands today we believe that Ceballos Lascurian is reflecting the reality of where the consumer and the industry is at.

Many consumers share a similar motivation of wanting to learn about the natural environment but are seeking different means to access this experience. Their choice is influenced by factors such as past experience, interests and stage of life.

The product they chose will come in many different forms but it is critical that there is a good match between the consumer, product and the environment.

Tasmania's Position

A recent survey of thirty Tasmanian nature based tour operators (Burgess 1993) found that two thirds of operators reported their customers wanted to learn about the places visited as a primary motivation.

Operators understanding of Clients Motives, Needs and Requirements: Burgess 1993

Motives	Number of interviewees who emphasised each factor
(1) Access natural areas (wilderness) and learn something about them	12
(2) Personalised service, "to get off the beaten track" become immersed in nature	4
(3) To learn about Tasmania's natural history and/or cultural history	4
(4) To learn outdoor pursuits	3
(5) Adventure	2
(6) To visit tourist icons	2
(7) To escape from urban society	3
Total	**30**

How many of these operators can be described as ecotourism operators? Burgess reported that " **most operators considered at least part of their operation to be ecotourism.** Minimal environmental impact philosophies and practices appeared to be well accepted and practised by most companies. The perceived importance of environmental education and interpretation varied widely between the respondents, although they all felt that they played important roles in influencing community conservation attitudes and behaviour"

There is a need to develop this product, especially in the area of education and interpretation if it is to satisfy the demands of the ecotourism market. It should also be recognised that some operators will choose to maintain their present position and market to their existing target audience.

The Tasmanian Strategy

Tasmania with its clean green image is one of Australia prime ecotourism destination. Yet, as the above study points out Tasmania has very little "pure" ecotourism product where all the key characteristics are met (refer page 4). Our current strength and most of the resources lie in other nature based and related product, particularly in the areas of adventure and independent travel.

We need to build on our strengths and at the same time develop ecotourism product. We need a strategy which encompasses all nature based tourism, including ecotourism.

Benefits

We can use the principles embodied in ecotourism to strengthen existing product and the standard of delivery to the consumer. The advantages of this approach are that Tasmania can:

- value add to existing product from a consumer and industry perspective
- build on the strengths of the existing industry base and increase its financially viablity
- maintain a diversity of nature based products
- attract markets for new and developing products
- create employment because of the high personal contact required to deliver these experiences
- enhance awareness of the need to conserve the environment through education and the delivery of services to visitors
- provide resources to manage and conserve natural areas
- become known world wide for the quality of product and management of natural resouces
- provide a greater economic return to the community
- increase regional economic activity and diversity of services, particularly in areas where traditional industries have been depleted by market forces

Tamanian Criteria for Nature Based Product

In developing the strategy it is critical that we target the appropriate audiences with clearly differentiated products which:

- are ecologically sustainable
- foster enjoyment, understanding and appreciation of the natural environment and its cultural values through the presentation of an appropriate level of information, interpretation and education
- contribute to the conservation of the resource and the well being of the local community
- have integrity and provide quality service

The reason for including the last criteria is to emphasise that the consumer is looking for authentic, quality products which must measure up in all aspects of the delivery of the experience.

What is your view of ecotourism?

What criteria would you use to define ecotourism?

Do you believe that ecotourism principles can be applied to all tourism in natural areas?

Do you agree that the strategy should focus on all nature based tourism, including ecotourism? If not, what should the focus be?

Do you agree with the criteria listed for Tasmanian nature based product?

Most visitors are impressed with the extent, diversity and accessibility of Tasmania's areas. With over 30% of the state set aside for its natural resource values (which includes 20.3% for World Heritage Area), it is understandable why the natural environment is a key feature of the Tasmanian product. These areas are able to support extensive ecological systems and the habitat for a number of endemic species. Wildlife is abundant and easy to see in its natural environment.

Key Features and Product

Accessible Natural Environment

Libby Buhrich in *Walks, Wildlife and Wonderful Food* points out that it is Tasmania's accessible and varied natural environment which holds appeal for the visitor.

As the title of this book suggests it is the combination of this feature with other attributes which appeals to visitors who are wanting more detail on what to see and do. A trip may focus around a special interest or combination of interests. Market segmentation studies reinforce the strength of consumers choice in this direction.

Wilderness

Wilderness is often cited as a prime reason for visiting the state. The Tasmanian Wilderness World Heritage Area is an outstanding example of one of the world's great natural and cultural treasures. Many visitors experience the fringe of this area while a smaller number explore what is some of the most challenging and remote terrain in the country.

Wilderness can also be experienced in other areas and is often associated with the unspoilt nature of the state.

Adventure

Traditionally, Tasmania has been known for its adventure product, particularly in the area of bushwalking. The Overland Track and areas of the South West have been sought out destinations. In recent years developments in these areas have made access easier. As well, other accessible areas are being used for shorter trips, such as the Southern Forests and Freycinet National Park.

The content of some of these experiences is changing in response to consumer interest in nature. Some operators are increasing the interpretation component of their product and see the "adventure" as a means of exploring the natural environment rather than the primary focus of the experience.

How should these products be positioned in relation to ecotourism? Some operators are using the term "eco adventure" to describe their focus and practices. Or is the term "adventure" more accurate and appealing to the target audience?

> *"Tasmania is the most accessible, varied area of natural phenomena in the world.... everywhere you venture in this blessed isle there are easy paths to walk, places where one can understand rainforest, lakes, mountain or sea....."*
>
> **Libby Buhrich 1993**

Ecotourism

In terms of a resource base for ecotourism it is quality of the environment and access to it which has high appeal, especially in terms of wildlife viewing and ecology.

This is my 6th trip to Australia and my first to Tasmania. The pristine nature of the state and the volume of the mammals to be seen make it a remarkable place

Director of Collections
San Diego Zoo, 1994

Uniqueness and a sense of discovery is important to these travellers.

Tasmania does not have the mega fauna of Africa but what you do have are these amazing animals which are quite unique. I want to know everything about them - their habits, their habitat, why they are only found in Tasmania. There is so much to discover .

American Special Interest Travel Consultant, 1993

While wildlife and the natural environment are the drawcards, these travellers want to experience all of Tasmania's special features.

Tasmania has so many treasures, many hooks, just not wildlife. The human history- both Aboriginal and European is of great interest.

Vice President Education,
Minnesota Natural History Museum , 1994

These travellers want a product which is set within the context of its natural and cultural environment. Information, interpretation and education are key elements to satisfying these consumers demands.

Tasmania currently offers limited product for the special interest natural history traveller who usually selects a small group tour which is accompanied by an expert guide.

There are other opportunities for the independent traveller to access information and have an interpreted experience with an operator or through use of on site services provided by the resource manager.

Appendix I provides a more detailed account of the special features of Tasmania's natural areas and demonstrates that there is scope to develop the content of the experiences for visitors.

Consumers Choice of Product

The majority of visitors experience Tasmania's natural areas as independent travellers. A number seek out guided experiences as part of their broader trip while others come specifically to participate in a particular guided trip.

In 1993, over 60% of visitors participated in some form of bushwalking and 26.6% of travellers went on a day/half day cruise. The range of activities visitors participated in is shown in the graph below.

In terms of tourism infrastructure, the majority of industry and resource management services support visitor interest in accessible natural/wilderness experiences.

There has also been considerable investment in providing services to more remote areas which appeal to a smaller but significant niche market. Section 6 provides a profile on the industry, the resource managers and other interested parties involved in the delivery of services.

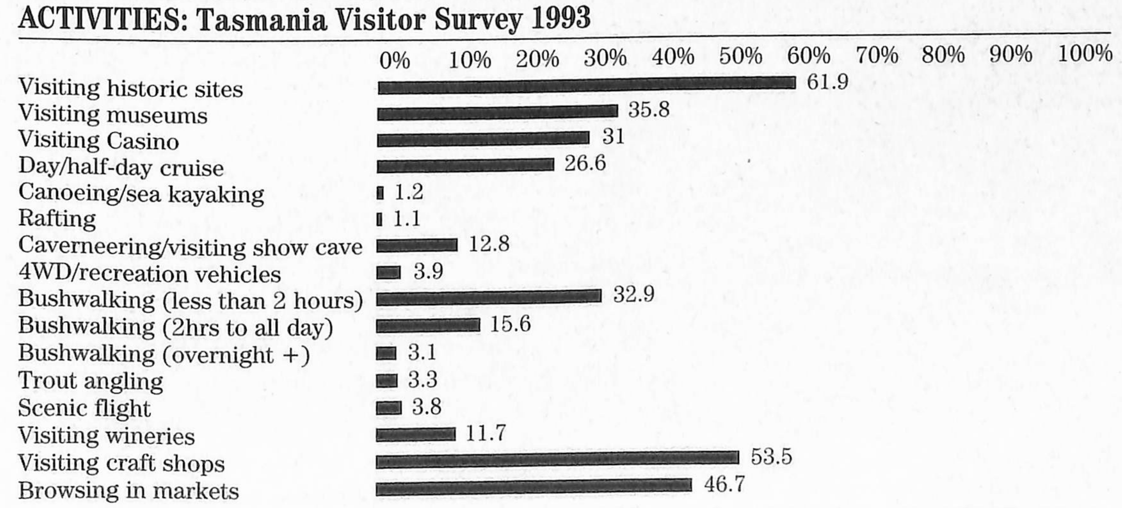
> *We combine the appreciation and interpretation of the natural areas of Tasmania, with the education of clients in the conservation of the natural environment, while on a range of activities from soft through to hard adventure.*
>
> **Jenny Cusick**
> **Tasmanian Expeditions 1993**

What do you consider to be Tasmania's key natural attractions and products?

What are the appropriate product development opportunities?

How should adventure and other nature based experiences be positioned in relation to ecotourism ?

ACTIVITIES: Tasmania Visitor Survey 1993



Selected activities from TVS 1993: Total Visitation 421,000.

This section examines the current and potential markets for Tasmania's nature based product. The Roy Morgan Value Segments are used to provide an insight into the domestic market and the special interest niche markets are the focus of the discussion for the international market.

Origin of Visitors

In 1993, 421,000 people visited the state of which 370,000 were domestic travellers and 50,000 were from overseas (Tasmanian Visitor Survey of visitors 15 years and over who stayed for one night or more).

The chart opposite illustrates the dominant state or country of origin.

DOMESTIC MARKET

As a step towards gaining a better understanding of Tasmania's market the Department of Tourism, Sport & Recreation has in 1993, combined the Tasmanian Visitor Survey (TVS) with the Roy Morgan Value segments. These profiles are based on an annual demographic and psychographic survey of 32,000 people across Australia. The characteristics of the ten segments are outlined in Appendix II.

Tasmania's Attraction to the Discerning Traveller

Tasmania is attracting visitors from three of Australia's biggest spending, most travelled and discerning market segments - The Visible Achiever, Socially Aware and Traditional Family Life.

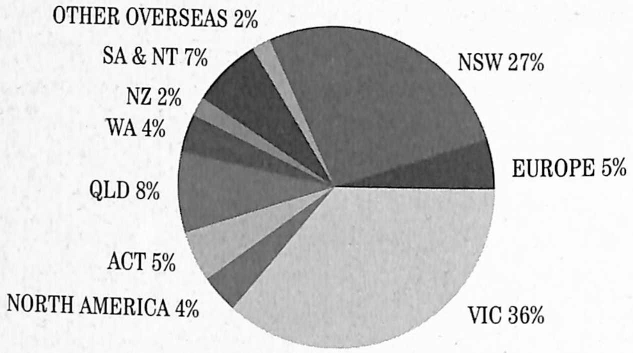
Who are they

Almost 69 percent of the visitors from these three segments are over 40 years of age, are sophisticated, well informed high earners who like to live well. They have strong family ties and are smart discriminating shoppers who respond to clever, factual and innovative advertising. The majority are free independent travellers and over half are first time visitors to the state.

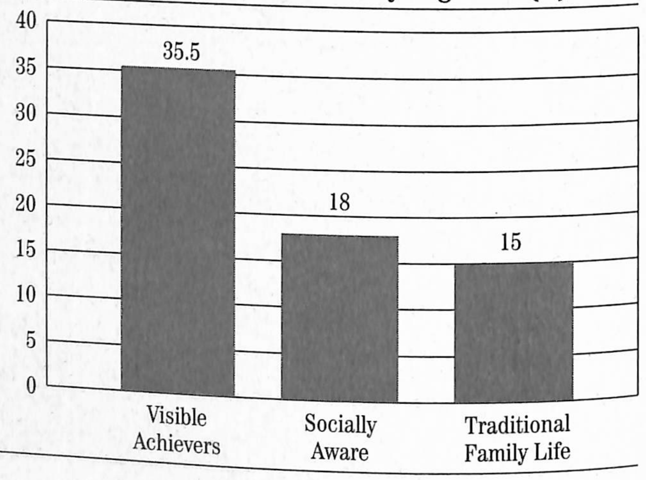
What they like

The three groups value Tasmania's clean, green, safe image. 66 percent went walking and two thirds said they visited a wilderness area.

Origin of visitors (TVS 1993)



Comparison of visitor numbers by segment (%) 1993



More than 50 percent visited markets, antique and arts and crafts shops and purchased items. Tasmanian speciality foods were high on their list of purchases - slightly more than 50 percent bought Tasmanian gourmet products. About 66 percent ranked visiting historical sights as an important part of their holiday experience

What attracts these visitors to Tasmania is the State's wilderness areas, the speciality foods, the strong cultural heritage, and its compact size and easy travelling.

Tasmania's Segmentation Profile

Visible Achiever

The largest of the Roy Morgan segments identified as travellers to Tasmania are labelled the **Visible Achievers.** In brief these travellers are:

- Average age 44 years.
- Professionals, or self-employed white and blue collar workers.
- Want to be recognised for their individual and family achievements.

- About a quarter of them have children and have traditional views about family responsibilities.
- Their holidays reflect their view of themselves as successful and well travelled.
- They are demanding, smart shoppers who will spend their money when they feel they are getting good value.
- Their favourite magazines are business, finance and current affairs. But in keeping with their desire to be ahead of the pack, they read lifestyle magazines such as *Vogue Entertainment Guide, Australian Gourmet, House and Garden, Home Beautiful.*

Socially Aware

The second largest segment attracted to Tasmania is labelled, **Socially Aware.** These travellers are:

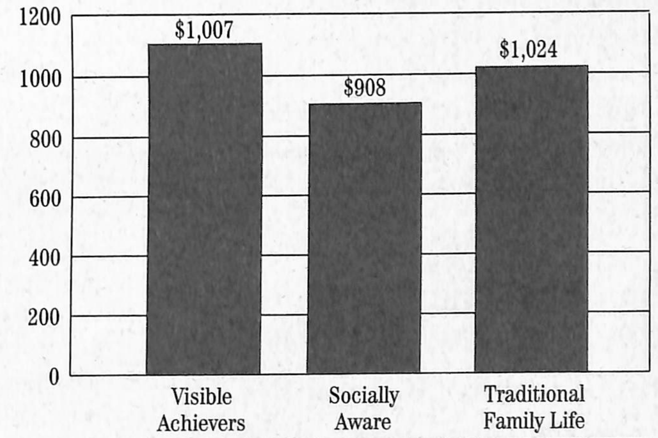
- Average age 40 years.
- Highly educated and usually have some form of university education.
- Care about their community and are politically and socially active.
- Arts lovers and avid gallery and theatre goers.
- Approach their family and professional lives with great care and thought.
- Travel is important to them, and it is one of many activities they peruse -mental stimulation is what they seek.
- Care about the environment and have progressive view about the subject.
- Avoid advertising hype and clichés and look for intelligent, tasteful ads that show imagination.
- They read *The Age* or the *Sydney Morning Herald's Good Weekend* magazine, *National Geographic* and *Geo.* Business, finance and current affairs magazines are also popular along with the major daily newspapers.

Traditional Family Life

The last major group visiting Tasmania is called the **Traditional Family Life** segment. These visitors are:

- Average age 61. Many are retired and most own their homes.
- They're more cautious about trying new things and have a strong commitment to traditional roles and values.
- Because they are financially comfortable and have more time they like to get away to nice places frequently.
- They are concerned about their health and God has an important place in their life.
- Their relationship with their grown children and grandchildren is paramount.
- They respond to down to earth commonsense advertising that is clear and concise.
- They have the highest readership of *Readers Digest*, *Your Garden* and *Prime Time*, with *New Idea* and *Women's Day.*

Expenditure 1993



Expenditure and Length of Stay

The Visible Achievers spend $1007 for an average stay of 8 days. The Socially Aware stayed for 10 days and spent $908 while the Traditional Family Life segment spend $1024 for an average stay of 14 days.

Adding Value

Tasmania is already attracting those segments of the market which are well suited to it's strengths. These segments contain consumers who are interested in nature based product. We need to deternine how these visitors can be encouraged to add value to their holidays through increased use of services and longer stays.

The three groups value Tasmania's clean, green, safe image. 66 percent went walking and two thirds said they visited a wilderness area.

Roy Morgan Omnibus Survey of Destination Awareness and Travel 1993

State	Awareness	Preference	Intention	Behaviour
NSW	15%	26%	18%	25%
VIC	12%	24%	12%	18%
QLD	57%	60%	22%	21%
TAS	17%	23%	3%	3%
SA	10%	18%	6%	7%
WA	12%	28%	6%	6%
ACT	3%	5%	2%	4%
NT	35%	30%	3%	2%
Overseas	-	-	12%	10%
None	13%	5%	28%	36%

These figures demonstate that Tasmania is ranked third for awareness of advertising, seventh for preference of destination, ninth for intention of holiday and ninth for actual holiday behaviour.

Awareness and Conversion

In addition, we need to convert interested or new parties into actual visitors. As the Roy Morgan Omnibus Survey of Destination Awareness and Travel (1993) shows there is a high awareness of Tasmania as a preferred destination but a low converstion rate.

Intrastate Visitor

The potential and requirements of the local Tasmanian market requires consideration. In 1992, Tasmanians spent over $250M on travel within the state.

The Ecotourist: A Consumer Profile

The Roy Morgan segments indicate that there are people within the groupings who could fit the profile of the ecotourist. Further information is required on who the ecotourists are.

The U.S Travel Data Center in its report *Discover America - Tourism and the Environment* (1992) drew on several consumer studies to build this profile of an ecotourist:

- Ecotourists tend to be relatively affluent, well educated, mature and environmentally focused
- Ecotourists tend to be outdoor enthusiasts: older than thirty: equally split between males and females; experienced overseas travellers who typically travel alone
- Ecotourist travel with a purpose, mainly to see, experience and appreciate the natural environment
- Almost half of the several hundred ecotourists interviewed in a recent survey deemed protected areas as either the "main reason" or an "important reason" for selecting their travel destination
- Nature tourists take longer trips and spend more money per day than other travellers with less interest in nature
- Ecotourists do not always seek quality food or lodging, although they can afford them. Their preference reflects their belief that " the facility where they are staying is not destroying the natural resource"

Ecotourists tend to be highly focused in their interests and pursue them with physical and mental vigor, combine physical activities with environmental pursuits, and measure a success of a trip by opportunities for discovery, and intellectual, cultural and spiritual growth

Discover America 1992

This profile provides a picture of the expectations of some international consumers. The expectations and standards of special interest consumers are high and Tasmania must meet their requirements if it wants to compete in this market.

How does this profile compare with your view of an ecotourist?

INTERNATIONAL MARKET

The inbound tourism market is growing at an average rate of 10% (Bureau of Tourism Research) and in 1992 total arrivals were 2,603,300. Tasmania's share of the international market is small (2%) but the potential is there to increase our share of the market. While we recognise that the domestic market is the backbone of our industry the international market offers the opportunity to develop some high value niche markets within certain countries.

Tasmania's Appeal to the International Market

Recent Australian Tourist Commission (ATC) research amongst consumers shows that they want to get more out of their holidays, especially in the following areas:

- Environmental awareness
- Education/Learning
- Value/Quality
- Access to the Australian Lifestyle and to the people.

Over the past few years the ATC has initiated segmentation studies of the overseas market. These studies have revealed that there are three major groups which are:

- Fun in the sun - young, beach based holidays
- City glamour - city based holidays
- Cultural discovery group.

The cultural discovery group is looking for an environmental or culturally based holiday, involving interaction with the environment and foreign cultures. This group is the largest especially in major markets such as North America and Europe. Most tourists in the other segments want to experience Australia's unique environment to some extent although it is not the major focus of their holiday.

Tasmania's natural areas as well as its cultural heritage, are a good match to those visitors seeking these features. The quality of Tasmania's wilderness areas, the extent and accessibility of walking tracks and other activities and the uniqueness of the flora and fauna are attractive to these markets. It is a question of whether Tasmania has the product and the means of connecting the consumer with the product. The strategy needs to address the shortfalls in these two areas.

We recognise that to operate in the international market requires the right product, packaging and distribution. Most operators say that it takes between four to ten years to establish a product in the international market before a return on the considerable investment is made. The strategy needs to address how Tasmania can increase its market share of the inbound market.

Partnership Australia offers one way of increasing awareness of Tasmania and its product and connecting buyers with operators.

Partnership Australia

Recent surveys show that Australia is rated as the first or second most preferred holiday destination by potential travellers in 8 out of 14 major markets - the United States, Canada, UK, Germany, Sweden, Italy, Japan and Korea. However, Australia's market share of global traveller arrivals of 0.5 per cent does not reflect its popularity in the marketplace.

Australian Tourist Commission 1993

Partnership Australia is a new initiative between the States and Territories and the Australian Tourist Commission which is designed to convert strong consumer interest in Australia into travel through increased coordinated joint marketing, improved information provision and tourism product development and distribution. This scheme presents an affordable way for Tasmania to increase its presence and sales in the international marketplace.

More and more visitors are choosing Australia as a holiday destination because of its unique environment. A recent survey of US visitors found that 95% were attracted to Australia because of its unique scenery and wildlife.

Margaret Hudson
Australian Tourist Commission 1993

There are three levels of cooperative activity which includes access to a centralised telephone information service has been set up in each region - North America, Japan, Asia and Europe - to answer trade and consumer telephone enquiries about Australian destinations and products.
The Department of Tourism, Sport and Recreation's centralised information system will be incorporated into this service and product information will be available and bookable through a network of accredited "Aussie" specialist travel agents in various overseas markets.

Other activities include joint advertising programs to promote product, familiarisations, tradeshows and the development of links between wholesalers, retailers and airline industries.

Tasmania as part of Australia and the Region

Tasmania is part of the long haul flight to Australia. Most visitors do not travel all the way to Australia just to see Tasmania.

Tasmania needs to seek out product which compliments and enhances it as a "must experience product". For example, the linking of some of Tasmania's product with New Zealand is being considered. Some of the industry believes that Tasmania is exotic enough to stand alone in the international market place particularly in the special interest market. The positioning of Tasmania's product requires careful consideration.

SPECIAL INTEREST MARKET - NICHE MARKET OF THE 90'S

The ATC predicts that special interest travel will expand. In America it is the fastest growing segment of the travel industry. Special Interest Travel(SIT) is the "umbrella for tourism of the 90s - educational, cultural, family, eco and adventure tourism". This growth is a reflection of the demand of consumers who want travel which emphasises:

- the experience
- continuing education
- is environmentally sensitive.

"Prime consumers of SIT are the Baby Boomers (born 1946-64) and older adults who are looking for more challenging trips, more educational trips as they are generally more healthier and more educated than the past generation of traveller".

"These consumers are not the mass consumer of yesteryear. They have major differences and expectations. For this group, educational is becoming synonymous with the learning vacation....understanding with cultural interaction....discovery with the unusual, unique peak experience....Value with quality of place....travel with an accent on participation and learning."

Mara Delli Priscoli TLC 1993

To operate successfully in the special interest market requires considerable planning, research, promotion and a great deal of care in the delivery of the product. The consumers are educated and sophisticated travellers who demand quality products.

THE NOT FOR PROFITS IN TRAVEL

Exploring the potential of the American Not for Profit (NFP) market for Australia was a major focus of the South Australian Tourism Commission's Ecotourism Project. The following section draws directly from the Dream Green Project and a paper delivered at the South Australian Ecotourism Forum(1993) by Mara Delli Priscoli of TLC.

In an assessment of Australia's potential as a destination for the NFP's Mara Delli Priscoli found that this market perceived Australia as:

- too expensive
- a long haul destination
- not exotic enough
- easy to do it yourself.

> *NFP's require "an itinerary not available elsewhere ... a once in a life time opportunity ... education, authenticity and quality of interpretation is paramount".*
> **Mara Delli Priscoli TLC 1993**

However on a more positive note the NFP's perceived Australia as a safe and healthy destination where the people were friendly and spoke english. Aboriginal art and culture and the environment were of major interest.

Over two hundred of the environmental and educational NFP organisations have travel programs. These organisations have membership programs which direct mail large numbers of people who have a special interest in nature and its conservation. Excluding Elderhostel, a sample of five of the largest Not For Profit's in travel programs in the USA returned in excess of 11 million dollars in foreign tour revenues.

Elderhostels program demonstrates the level of interest in this type of educational travel which is linked with universities and other programs worldwide.

Elderhostel travel covered 24 000 international and 200 000 domestic travellers in 1992, grossed $59 000 000 in tour revenues and is expecting an annual growth rate of 17.25%.

Mara Delli Priscoli pointed out that to operate successfully in this market requires great precision in marketing and a highly differentiated product.

At the conclusion of her paper Mara Delli Priscoli stated that the outlook for growth in the Nonprofit/SIT groups to Australia could be viewed with cautious optimism in the short term and healthy for the long term.
Once certain perceptions are overcome , Australia with its strengths in natural history will become a major destination for nonprofit conservation groups and natural history museums.

The strategy needs to determine how Tasmania can be part of this growing market. Tasmania has the natural qualities that these groups are seeking.

Evaluation of Tasmania's Product

In terms of product development, areas that require attention include pre and post tour information, standard and level of interpretation, supporting infrastructure - accommodation and transport.

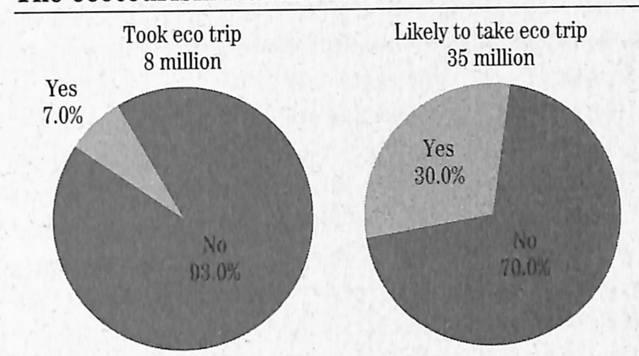
There is some existing product which is suitable for the market. Limited awareness of Tasmania as a destination makes it difficult to market and sell the product.

Development opportunities exist especially in the special interest group and independent traveller market. Itineraries need to be developed, packaged and distributed.

FREE INDEPENDENT TRAVELLERS

The FIT market is also a potentially rich source of income. In 1992, the US Travel Data Centre Report on *Tourism and the Environment* reported that 7 percent of USA travellers or eight million adults have taken at least one ecotourism trip (defined as "one during which travellers learn about and appreciate the environment"). Even more significant, nearly one-third or 35 million adults said that they are likely to take such a trip in the next three years.

The ecotourism market 1992



Potential Ecotourism market = 43 million
Source: U.S. Travel Data Centre

This group was described "as experienced overseas travellers who typically do not take traditional travel tours but to visit foreign, hard to access, dangerous or fragile wilderness areas - they will join a group or take a guide."

Some of this group is already tapping into Tasmania's special interest product but in very small numbers.

BACKPACKERS

The backpacker market has grown significantly in the past few years. The Bureau of Tourism Research data for 1992 showed that *166,000 backpackers visited Australia staying an average of 78 nights compared to 25 nights for all travellers and spent an average of $3267 compared to $1760 for all visitors.*

> *"There is a lot to see that is quite unique to Tasmania. Devils in the wild and the geographical wonders."*
> **Backpacker Survey 1994**

During the summer of 1993/4 the Department of Tourism, Sport and Recreation initiated a study of Tasmania's backpackers market as the first step in developing a strategy for this market segment. A report of the major findings is included in this paper as the backpackers interests are very aligned to discovering and experiencing Tasmania's nature based product.
Their profile fits that of the young optimist who in later years emerges as a socially aware traveller.

Who are the Backpackers?

If brief, the backpacker visitor to Tasmania is aged between 20-29 years of age with a mean age of 25. They are highly educated with approximately half employed as full time professionals. The United Kingdom and Europe are the two dominant countries of origin, followed by North America, other Australians, and Japan. Backpacker accommodation owners reported a growth in the German and Japanese traveller. Over 60% visited another country on their way to or from Australia with Sydney, Perth and Melbourne being the major ports of entry.

Length of Stay

Over half the backpackers stayed for 8-14 days with a third staying 15-30 days. Most backpackers recommended that a minimum stay of two weeks was essential to explore the island. Tight time schedules and prebooked tickets were problems which prevented extensions of visits.

Interests and Issues

They are extremely price conscious although they will spend money if the experience is perceived to have high value. Tasmania's principal attractions were its environment, wilderness, variety of actvities, bushwalking, wildlife, friendly people and history.

"Wilderness attractions are really good."

"There is history, friendly people and great diverse areas for walking."

Word of mouth was the main way backpackers found out about Tasmania along with the Lonely Planet guidebook. Backpackers have a high level of satisfaction with their Tasmanian experience although they have indicated that there are some critical areas that require attention including transport, accommodation, price of activities and accessing information on Tasmania prior to departure in their country of origin and on the mainland.

This study will be released in July 1994 for discussion leading up to the development of a strategy for the backpacker market.

Summary

Tasmania has the natural attractions, lifestyle and culture which appeals to these markets. Awareness of Tasmania as a destination is a major issue which must be addressed. It is also a question of whether Tasmania has the product and the means of connecting the consumer with the product. The strategy needs to address the shortfalls in these areas. We need to determine which markets to target and develop a plan to sustain the considerable investment required to operate in both the domestic and interna-tionl market place.

> *"Because it offers such a variety of differing activities set in wonderful surroundings - excellent."*
> **Backpackers Survey 1994**

Which markets should Tasmania seek out?

What are the strengths and weaknesses of existing product? What are the gaps?

How can awarewess and desire to visit Tasmania be increased? How can preferences be converted into visits?

How can we add value to these visits?

What changes need to occur to Tasmania's promotion, product and distribution systems for the requirements of the targeted markets to be met?

What additional infrastructure needs to be developed to enhance visitor experiences?

Tasmanian Industry Profile

In December 1993, the Department of Tourism, Sport and Recreation initiated an industry survey of 1400 operators.
Two hundred and ten of these business were tour operators of which half had a nature based product focus. There was an overall response rate of 44%. The following section provides a brief summary of the preliminary findings as they relate to the tour operators.

Business Profile

Of the tour operators surveyed, more than half the businesses:

- have been in operation and under the same owner for six years (53%),
- employ guides - 68% employ less than five, 16% employ less than nine and 16% employ more than 10 guides,
- are open most or all of the year (57%),
- have prepared business plans (60% in writing),
- provide in-house training (51%) or a mix of in-house and external. Operators were interested in taking courses in marketing, tourism packaging and market research.

Less than half of the operators (46%) had no previous experience in the industry. Owner-operators comprised 92% of those surveyed and managers 8%.

Product

Their products included bushwalking, adventure tours (rafting, cycling, walking, abseiling, caving, horseriding), educational and wildlife tours, marine charters, diving, fishing and activities associated with accom-modation based experiences.

The majority of these operators attract their business from the domestic market. Overseas visitors came from the USA /Canada(3.4%) and Europe(3.1%) followed by the United Kingdom(2.1%), Japan (1.2%), elsewhere in Asia and New Zealand.

Marketing

The most effective forms of marketing were word of mouth, brochures, direct mail, travel centres and magazine/newspaper advertising.

Thirty one percent of these businesses spent less than 9% of gross revenue on marketing, twenty three percent spent 10% to 19% and thirty percent spent more than 30%. Approximately fifty five percent of tour operators do co-operative marketing.

Market research is done by 78% of the operators with 66% done through informal research such as random checks on the origin of visitors. Six percent of businesses use an outside consultant for market research.

Investment

The businesses surveyed had a total capital investment of $60 million, gross revenues of $42.5 million and payrolls of $3 million. These businesses plan to invest $10.6 million in the fiscal year 1994/95.

> *Tourism in the year 2000*
>
> *The industry will be characterised by solid growth with an emphasis on ecotourism and quality products*
> **Tasmanian Industry Survey 1994**

Standards

For operators licensed in reserves under the National Parks and Wildlife Act certain minimum standards accompany each license. These standards relate to environmental, safety and the content components of the operation. In addition, some of these licenses contain agreed conditions regarding the training of guides.

A number of operators belong to industry associations which have or are in the process of developing operational or accreditation standards. See Appendix III.

Product and Industry Development

The Tasmanian Industry Survey has demonstrated that there is a small but committed base to this sector of the industry. There are a number of key issues which must be addressed in terms of the industry's development. These issues include product development; marketing; standards, training and accreditation; licensing: use of the natural resource and business management. Section 7 covers these issues in more detail.

THE DEPARTMENT OF TOURISM, SPORT & RECREATION

The Department works in partnership with the industry to increase awareness of Tasmania as a destination and the value and standard of product being delivered to the visitor. It has specific functions in the areas of marketing and research; product distribution and sales and industry development. It has a leadership role to facilitate growth which can only occur in partnership with the industry and the resource managers.

The Department also works with the resource management agencies on the delivery of tourism and recreation services. In many areas there is an interdependency with the delivery of services such as information, signage, interpretation, land use and research. These functions cross agencies and land tenure boundaries.

The desirability of having a coordinated approach to government policy in the area of tourism and recreation is the foundation upon which an interagency committee on recreation/tourism use of state owned land operates.

Resource Managers

Access to the natural resource is fundamental to the Tasmanian tourism industry and its nature based product. The Department of Environment and Planning through the Parks and Wildlife Service (PWS) and the Forestry Commission are responsible for managing the state's reserved areas and state forest respectively and are major suppliers of visitor services.

The PWS has a primary responsibility to manage its areas for conservation, recreation and for some multiple use. The Service is also responsible for the conservation and management of Tasmania's wildlife both on and off reserves. The Forestry Commission manages its areas under a multiple use philosophy. Both agencies include the management of visitors, their experiences and impacts, in area management plans. Some of these plans have within them site specific visitor management strategies.

These agencies recognise the need to gain a greater understanding of visitors and the industry and are fully supportive of the development of this strategy.

THE FORESTRY COMMISSION

Since amendments to the Forestry Act in 1991, there has been a shift in emphasis within the Forestry Commission. Some of the more popular recreation sites (including forest reserves) are now being presented to visitors in the context of the surrounding multiple use State forest. In addition, rather than concentrating its efforts on forest reserves, the Commission has been developing and refining tourism opportunities throughout State forest. Opportunities will be encouraged and developed to provide visitor experiences that interpret the multiple use philosophy, with an emphasis on the issues relating to production forestry.

The Commission sees its strengths in being able to provide;

- easily accessible, vehicle trips offering a distinctive experience which may include a tour, picnic, short walk and some form of interpretation; and
- active recreation experiences such as four wheel driving, horseriding, fishing, orienteering, hunting and trail bike riding.

Most of the growth is coming from the interstate market which are responding to strong marketing by regional tourism groups and businesses.
Forestry CommissionVisitor Manual 1993

The Forestry Commission is in the process of developing visitor management strategies for a number of major visitor sites in State forests. In 1993/94, the Commission monitored 250,000 visits to its major sites, and estimates that some 400,000 people visit Tasmania's State forests annually.

Visitor Profile

The local visitor represents a traditional, consistent market. They visit regularly and enjoy activities such as picnics/barbecues and short undemanding walks. They are resouceful, sometimes self-sufficient and are content with whatever facilities are provided. These visitors are unlikely to use the information and interpretive opportunities on site, which tends to limit their understanding and quality of experiences. Recent research confirmed that this market is unlikely to undertake a commercial tour in State forest.

The interstate visitor market are attracted by locations that have a specific identity such as a waterfall, tall tree or especially designed walk. These visitors tend to seek out pre-visit information and expect a considerable level of on-site orientation and information signs. As a consequence of their travels, these 'tourists' have greater expectations of the quality and performance of facilities. Recent research suggests that this market is interested in commercial tours in State forest.

Forest Tourism Policy

During the early part of 1994 the Forestry Commission undertook research into existing tourism operations on State forest. Information on the nature of operators, experience and clientele is being used to develop a forest tourism policy, due for release in late 1994.

Where applicable, the Forestry Commission intends to develop partnerships with tourism operators and it will explore opportunities for commercial facility development in State forest.

Resources

The Forestry Commission relies on general revenue allocation to manage its visitor services. \$1.87m was spent on visitor services in State forest during the 1992/93 financial year. This reduced to \$1.45m in the 1993/94 financial year.

PARKS AND WILDLIFE SERVICE

The PWS is a major provider of visitor services. Over one million visits were recorded to Tasmania's national parks in 1992/93. This figure can be doubled if the non park centres are included. Mount Field is the State's most popular national park (205,000) followed by Freycinet (169,000) and Cradle Mountain (158,000).

Of the visits to major park centres, approximately 60 – 70% are from interstate or overseas. Particular attractions such as the Overland Track or South Coast Track attract approximately 10% overseas visitors.

Visitor Management Strategies

The Parks and Wildlife Service uses a zoning approach to the delivery of services which includes tourism and recreation. In recent years, the Service has given priority to improving visitor services at popular sites as well as completing a track management strategy for the World Heritage Area. In particular, considerable resources have gone into providing services within visitor service zones such as Cradle Valley and recreation zones which receive heavy use from walkers.

While this approach aims to minimise visitor impacts on areas and to provide opportunities for education and interpretation, it requires constant monitoring and good access to information on visitor behaviour as well as enviromental change. Education has also played an important role in minimising impacts.

Visitor Profile

Over the past few years the Parks and Wildlife Service has been conducting visitor surveys at certain sites to assist with the preparation of management and site plans. While the results for each site differ there are some common themes:

- major sites appear to attract high numbers of first time visitors and a majority of interstate and overseas visitors
- visitors like to participate in some form of activity with walking and sightseeing being cited as the most popular activities
- visitors are seeking and using publications and interpretation facilities where available.
- certain areas have a strong use by the Tasmanian population and it is suggested that the experiences and aspirations of some Tasmanian visitors may be different to those of visitors from interstate and overseas.

Case Study:
The Cradle Mountain Visitor Survey Summer of 1990-91

Seventy-three per cent of survey respondents were first time visitors, 49% planned to a short walk during their day visit while 36% planned to go sightseeing. Forty-eight per cent of all the vehicles surveyed had two or less people in them, 31% used publications as their main source of information on the park while 26% of respondents had been before. Fifty-eight per cent of the respondents had called into the Visitor Centre and more than half the visitors were from overseas or interstate

Relationship with the Industry

The Service requires all operators who use state reserves to be licensed. These licenses have set guide: client ratios, insurance, safety and other operational requirements. A set fee or percentage of gross takings is used to calculate the fee.

The Service is keen to work with the industry to improve the quality of services to visitors. There has been limited use of staff to assist with training and provision of specialist interpretation services.

Resource

Total spending by the Parks and Wildlife Service in 1992-93 was $17.3 million with 70% being for recurrent spending (predominantly ranger and specialist staff salaries) and 30% being for capital works (visitor services). Within these allocations about four percent of the total budget is spent on interpretation.

Having sufficient resources to manage these areas is a constant problem, particularly outside of world heritage areas. Funding from the Commonwealth Government for the World Heritage Area has greatly assisted but is subject to renegotiation. With this outlook the Government introduced park entry fees in 1993 which have been met with a mixed response from both the industry and the consumer. A review of the fee system is currently underway.

Development Needs

The Department has identified that there are several gaps in current services and product. These include nature tours and other special interest tours, such as wildlife; interpretation, sufficient day walks and a limited number of longer walks. The Department has also recognised the need to develop a specific policy in relation to tourism.

INTERESTED PARTIES

There are also many other organisations who are involved or have an interest in nature based tourism and its resource use. These include all levels of government, conservation groups, Aboriginal people, community organisations, recreational groups, educational institutes and the broader business community.

What are critical industry development and natural resource management issues which must addressed?

What role should be the role of the resource management agencies in the industry?

What should be the role of the Department of Tourism, Sport and Recreation?

What are the roles of industry associations and other non government organisations?

Strengths, Weaknesses, Opportunities and Threats

The previous sections have identified that Tasmania has many strengths yet there are weaknesses and other threats which must be confronted if the potential of the industry is to be realised.

Strengths

- Tasmania has strong appeal to the better educated and more affluent segments of the market which encompass the most frequent travellers.
- Tasmania has the natural environment, culture, lifestyle and quality products which these people seek. It is the combination of these qualities which gives Tasmania a competitive edge over other destinations.
- Many of the State's natural areas are easily accessible and offer an excellent range of settings for a diversity of experiences.
- The quality and extent of these natural areas, especially the Wilderness World Heritage Area (20.3%) are a major drawcard. These areas offers a very strong base for the development of special interest tourism.
- The State has unique wildlife which is unusual and interesting in a world context and is remarkably easy to see.
- Tasmania has a very rich Aboriginal heritage.
- There is adequate infrastructure already established in or adjacent to many natural areas to assist visitors enjoy their stay. There is a small established base of professional tour operators who offer services on a regional or statewide basis.
- A licensing system exists for operators who use land managed by PWS. The Forestry Commission also has a registration system for operators.
- The industry is starting to organise itself into networks and into associations to strengthen its competiveness and standards.
- The state has its own centralised tourism information system and a product distribution and sales system which is available on an Australian wide basis with some links to overseas markets.

Weaknesses

- There is a limited awareness of Tasmania and its nature based product in the international market.
- There is a low conversion rate from awareness and desire to buy for the domestic market.
- The marketing of Tasmania's natural areas and product has been too "general" which has not allowed consumers to appreciate the range of specific experiences available.
- There are gaps in the product range such as special interest natural history/wildlife tours/aboriginal heritage.
- The level of interpretation offered around the State varies considerably in standards and in quality of service.
- There are limited training opportunities for special interest operators.
- The economic viability of many small operators limits their scope to undertake marketing, training and product development initiatives.
- The travel trade and consumers report that it is difficult to book product. The packaging and freesale of available product needs to fit with current market demand.
- Many operators lack understanding of the international market and how it operates
- Some transport infrastructure and regulations inhibit easy access to and around the state as well as the provision of required services.
- Some transport infrastructure and accommodation needs to be improved.
- The small financial base of the state restricts the availability of resources to support infrastructure development and services in natural areas.
- The lack of management plans and policy in some areas makes it difficult to address development needs and opportunities.

Strengths, Weaknesses, Opportunities and Threats

Opportunities

- Tasmania has a very strong resource base from which to develop existing and new product.
- The growth in special interest tourism from both the domestic and international market fits with Tasmania's natural resource strengths. The uniqueness of these attributes place the State in a strong position to be included in an Australian itinerary for the international traveller.
- Within resource management agencies, tertiary institutions and Non Government Organisations there are a considerable number of specialist staff who could be used to assist with guiding specialist groups or training in specific areas. Some of these agencies and industry operators have also been recognised for the excellence of their work which is being used as models by others within the Australian tourism industry. The opportunity is there to export this knowledge and enhance Tasmania's reputation for the quality of the State's product and environmental management.
- There is scope for the industry to work with these agencies to improve their knowledge of the industry and consumer demands as well as assisting with the conservation and sustainable use of the State's natural resources.
- Tasmania has a very strong Aboriginal heritage from which the Aboriginal community could develop tourism products.
- The accessibility of natural areas especially to the key gateways of Hobart, Launceston and Devonport make it possible for all interested visitors to have more than a taste of Tasmania's natural areas.
- The opportunity exists to further develop infrastructure in and adjacent to natural attractions.

Threats

- Increased competition from other states and overseas destinations which are seeking to deliver quality products and to develop new product for specific markets. There are many other interesting and exotic destinations which are in a position to outspend Tasmania in promoting product to the consumer.
- Failure to take a sustainable approach to the development and delivery of product.
- Tasmania's dominent domestic visitors are also those travellers who seek outstanding experiences in these destinations. With the strengthening of the Australian dollar, overseas travel becomes even more appealing to these groups and less appealing to the inbound market.
- The lack of profitability and viability of some small operators affects buyers confidence in Tasmanian product, especially in the international market.
- Failure to deliver consistent quality products, especially in the ecotourism or special interest market where the expectations of the clients are extremely high.
- Lack of adequate resources to manage visitor use and develop the infrastructure which provides access to Tasmania's parks, forests and reserves.
- Lack of sufficient resources to develop and promote awareness of Tasmania and its nature based product.
- Inability of certain interest groups to work together to develop the industry for Tasmania.

Tasmania's Competitive Advantage

Tasmania's natural and cultural strengths give it a competive advantage. The S.W.O.T analysis has identified a number of issues which must be addressed if this advantage is to give Tasmania a leading edge in the market place. The next section gives a brief report on each issues and lists some options for consideration. The list is not definitive and is presented for discussion purposes only.

What strengths, weaknesses, opportunities and threats would you add to or delete from the S.W.O.T analysis?

Standards: Accreditation and Training

Accreditation

Accreditation is being considered by some of the industry as a means of establishing standards and providing a competitive edge in marketing product. Many government agencies share the need to establish standards to ensure the delivery of safe, high quality and ecologically sustainable products. There is some debate as to whether accreditation will achieve this and **there is considerable debate about how accredition systems can be developed and implemented.**

The Federal Department of Tourism has contracted ATIA to manage a consultancy to establish a process by which accreditation might be established. The consultancy is expected to be completed by late 1994.
A Steering Committee has been established for this project. Members include the Ecotourism Association of Australia, ATIA and the Australian Conservation Foundation.

Options

- support industry and government moves to develop accreditation systems.
- become involved at a national level on the accreditation of the industry.
- monitor the delivery of these systems to ensure that client and environmental requirements are being met.

Training

Training and the development of training schemes is being tackled on many fronts as a means of raising standards and practices.
It is government policy under the national training agenda that all accredited training should be competency based.

A number of general schemes are available, such as Aussiehost and ITOA Guide Training Scheme. However, there are few specialist guide training schemes. Currently most operators run their own training programs.

For competency based training in particular outdoor activities there is some common ground between the tourism and recreation industries. As part of the National Outdoor Recreation Leadership Development Process and the ACTRAC "National Adventure Guiding Project" discussions have been held between these two industry groups.

Options

- continue to support training opportunities such as Aussiehost and develop other opportunities for more specialist training in particular areas.
- support competency based training
- establish benchmarks for operational standards for the various groups involved in nature based tourism
- recognise operators who attain these standards and eventually only promote and market these operators

Codes of Practice

Another approach taken to the encouragement of good practices and standards has been to establish Codes of Practice. A sample list of codes, accreditation systems and standards is included in Appendix III.

Options

- continue to develop specific codes for particular activities eg minimal impact bushwalking.
- develop codes with the industry for specific practices eg. environmental code of practice.

The majority of businesses thought that they would fit well into the industry of the future. This would be accomplished by providing a high quality product and and a high standard of services.

Tasmanian Industry Survey 1994

Ecological Sustainability

In November 1991 the National Strategy for Ecologically Sustainable Development was released. There was agreement that all forms of tourism should be ecologically sustainable. The challenge is how to put these words into action.

Options

- increase understanding of ESD principles across the industry and translate into practical applications.
- invest in appropriate design and technology.
- promote role models of best practice in ESD and the sensitive use of sites.
- educate the traveller and the travel industry in how to minimise impacts and use best practice methods.
- monitor application of principles and impacts.

Natural Resource Management

Tourism and recreation are one of the prime uses of natural areas. This use needs to be compatible with the other values such as conservation and protection. All of these values must be catered for within area management plans. The effectiveness of these plans is dependent upon how well the visitors are managed especially in their use of the site. Information, interpretation and education are key tools for enhancing visitor experiences as well as protecting the resource. These plans should be developed and amended from a good information base which includes the monitoring of impacts.

A critical issue for the state to address is how planning and infrastructure development can keep pace with demand. In the past few years the resource management agencies have had revenue cut backs and this situation looks likely to continue. The lack of resources is one of the reasons for introducing user fees.

Options

- develop specific strategies for the management and development of tourism in relevant management plans.
- develop tourism policies and specific strategies for key activities eg. wildlife
- monitor impacts and work across the industry, agencies and visitors to minimise impacts.
- establish limits of acceptable change for specific natural areas.
- increase the resource agencies understanding of the industry and the visitor
- increase the industries understanding of resource management.
- establish regular industry/government forums involving land managers and DTSR to faciliatate this communication.
- build partnerships between the industry and the resource managers.
- licence all operators and have an agreed set of performance standards.
- develop training and accreditation schemes.
- develop a visitor information, interpretation and education strategy at a statewide, regional and site specific level in conjunction with the industry.
- continue user fees and consider other options for raising revenue.

Integrated Planning

Effective tourism planning requires that an integrated approach be taken to the use of the resource and the delivery of the service. There are many agencies involved in approval process which requires good communication and coordination to avoid a piecemeal approach to development and planning.

Options

- develop a strategic approach to the planning and delivery of nature based tourism experiences across state, regional and local boundaries.

Regulation, Licensing and the Approval Process

Regulation and licensing are part of the approval process which is a necessary part of any planning system. Much has been written about the frustrations that many operators and developers have experienced in gaining approval to implement projects. There is a need to improve the efficiency of these systems to deliver meaningful decisions. There is also a need for all parties to have a good understanding of different agencies roles eg. conservation role of resource managers.

> *A joint effort between public and private sectors will be required to achieve sustainable management of tourism*
>
> **NZ Ministry of Tourism 1992**

There are some areas of the transport licensing system which require review in the light of changing consumer demand and competitive forces.

Options

- development of clear guidelines for tourism development in natural areas so that developers are well briefed on the parameters of their options for development.
- review the transport licensing system.
- monitor the effectiveness of the planning approval process to deliver consistent and equitable decisions.

Interpretation and Education

These two areas are critical to the delivery of quality nature based experiences as well as fostering an appreciation and caring attitude towards the environment. A key to the delivery of the content of the experience to the visitor is to ensure that an appropriate level of interpretation is given.

Options

- develop training programs for guides and operators.
- investigate the use of resident experts - resource specialists in government agencies, university and Non Government Organisations (NGO's) - to guide as required for special interest groups.
- extend programs such as the summer ranger programs and interpretation at specific sites.
- build up the resource material by which the industry and the consumer can understand and interpret their experience. This can be a joint project between all parties.
- establish regular exchanges between the resource managers, university, NGO's and the industry to outline research projects and programs.

Marketing

There is a need to improve awareness of Tasmania and the state's nature based product at a domestic and international level. Converting awareness into sales is a major challenge. Having an effective and affordable marketing plan is essential for the industry.

Decisions are being made on limited knowledge and there needs to be improved monitoring of outcomes. The Roy Morgan segmentation studies will assist with this process but further information is required about the market. It is essential that Tasmania delivers what it promotes especially to the discerning traveller.

Options

- develop a better understanding amongst all Government and private sector stakeholders about market demand and about visitor's motivations, expectations and product/service requirements.
- develop a marketing plan which is meaningful and affordable for small operators and that is based on detailed segmentation of domestic and international markets.
- investigate collective approaches to the marketing and distribution of product.
- foster cooperation between the industry and government agencies in the promotion of the natural resource products and the environmentally responsible use of areas.
- develop better systems for distributing market and product intelligence to the industry, trade, resource managers and NGO's.

Product Development

There is a need to develop Tasmania's ecotourism product and develop existing product to meet emerging market demand. We need a better understanding of the market and require the resources to develop and package the product. The products need to be made more accessible to the trade and buyers.

> *To operate successfully in the special interest market requires considerable planning, research, promotion and a great deal of care in the delivery of product.*
>
> **Australian Tourist Commission 1993**

Options

- investigate the market and product requirements of the special interest market.
- examine how existing product can be directed to these markets.
- increase industry knowledge of how to package and distribute product.
- develop networking between the industry as a means of increasing the size of saleable product and improving the services necessary to run an efficient small business.

Viability

Many of the small nature based businesses find it difficult to be financially viable. They have high labour costs and most deal in low volume. They have difficulty in attracting finance and they have limited resource to market their product. Most do not operate at capacity. Many are affected by the seasonal nature of the business. Tasmania needs a solid base of operators who are committed to a long term involvement with the industry.

Options

- develop strategies to increase the flow of clients to the operators for an extended part of the year.
- seek to attract investors who have the capacity to establish viable businesses.
- promote networking within the industry to increase the availability of resources to market and develop product.
- support industry associations which are seeking to service members through cooperative buying schemes in such areas as insurance and business equipment.
- establish training programs to improve the professional business practices of small operators.

Involvement of Tasmanian Aboriginals

In 1993, an Australia Council Study of international visitors revealed that a substantial number of visitors were interested in seeing and learning about Aboriginal arts and culture. While the Tasmanian Aboriginal community has a very rich heritage, it is being cautious about its involvement with the tourism industry.

There are opportunities for Aboriginal people to develop their own product or to do so in conjunction with other operators. Any development that involves indigenous people and their heritage must be done through consultation with the appropriate community.

At a national level the Aboriginal and Torres Strait Islander Commission (ATSIC) and the Commonwealth Department of Tourism are jointly developing a National Aboriginal and Torres Strait Islander Tourism Strategy. It is expected that a draft report will be available in mid-1994.

Options

- liaise with the Aboriginal community on how they wish to become involved in nature based tourism.
- increase the Aboriginal communities understanding of the tourism industry and knowledge of available resources in business management, training and finance.
- increase the understanding of the tourism industry and the resource managers about Aboriginal heritage and the requirements of Aboriginal people.
- work with Aboriginal people on the presentation of their heritage to visitors.
- support Aboriginal people in their assesment of their sites for visitor use.

Social Impact and Equity

Site specific visitor surveys indicate that there are some differences in the experiences sought between local users and visiting tourists. In some places the locals have been displaced by the visitors and the site has been changed to cater for particular interests or pressures. Increased numbers have changed the experience for some users and permits may need to be introduced to manage numbers in certain areas. To date there has not been a tendering system for operator licences but this system exists in other places due to commercial demand.

> *Any ecotourism ventures that involve indigenous Australians should be developed through a process of consultation and negotiation...to ensure that the community has the opportunity to make decisions about the nature of their involvement*
>
> **National Ecotourism Strategy 1994**

Options

- consult with community and industry users in decisions which affect access to natural areas.
- monitor the effects of tourism on local communities.
- investigate how social equity issues are being managed in other locations.
- develop strategies to ensure that there is a flow on of benefits to the local community.
- assess the values of the intrastate market and their specific needs for inclusion in industry development plans.

Developing a Strategy

These are some of the issues which must be addressed in developing a tourism industry development plan for eco and nature based tourism. There may be other issues which need to be addressed and we invite your input. From this discussion we can move to examining how we can take action to increase the profitability and quality of this section of the industry.

What do you consider to be the priority issues?

What action is required to address these issues?

What is special about Tasmania's Natural Areas

Tasmania has an incredibly rich and diverse resource base from which visitors can experience natural areas. This base can also provide the subject matter from which the content of the experiences can be drawn. What do we have to offer the potential visitor who has any number of special or unique experiences to choose from around the world. What is Tasmania's special appeal?

The extent of the State's Natural Areas

Over 30% of the state is listed as reserved area. Of this, 21% of Tasmania is reserved as state reserve, game reserve or conservation area a proportion four times the national average and nearly double the proportion reserved in the state with the second highest proportion of reservation (Victoria). Twenty per cent of the state is on the World Heritage Listing which again is a higher proportion than for any other state.

State Forest, including forest reserves accounts for 23.3% of the state and a small percentage of privately owned land holdings are used for a range of tourism experiences.

Variety of the state's natural environment.

Tasmania has an extraordinarily diverse range of natural environments. From the sandy beaches and dry eucalypt forests of Freycinet, to the thousands of glaciated alpine lakes of the Central Plateau, to the craggy peaks, rainforest and wild rivers of the South west.

Tasmania embraces cool temperate environments similar to New Zealand and Patagonia in South America as well as dryer, warmer environments common to the Australian mainland. The flora and fauna of the state takes in species that are relicts of the time when Tasmania was part of the great southern supercontinent, Gondwanaland, as well as a large number of species that invaded from Asia.

Tasmania is the world's most mountainous island. Glacial erosion beginning two million years ago and finishing with the end of the last ice age about 10,000 years ago played a large part in carving many of the spectacular mountains that the state's reserves are famous for such as the Western and Eastern Arthurs, Cradle Mountain and Frenchmans Cap.

As an island state, Tasmania has over 5,400 kilometres of coastline and 20,600 square kilometres of coastal waters within its jurisdiction. These waters include the habitats of a number of rare marine species. There are four marine reserves - Governor Island, Maria Island, Ninepin Point and Tinderbox.

Tasmania is also well known destination for trout fishing. Wild trout spawn naturally in Tasmania and the Central Plateau with its many lakes is a key destination for anglers.

Uniqueness of Tasmania's Fauna and Flora

Tasmania is host to the endemic Tasmanian devil *(Sarcophilus harrisi)* – the world's largest carnivorous marsupial. The devil's place as the world's largest marsupial mammal was previously (and may still be) occupied by the thylacine whose legend adds considerable mystique to the state's marsupial heritage. Other endemic species include the eastern quoll, Tasmanian bettong, Tasmanian pademelon and the long tailed mouse.

Tasmania has been an island fortress and still has a large proportion of endemic species, and has remained relatively free of introduced exotic plant and animal species. The widespread introduction of foxes and cats on the mainland has made the sighting of many relatively common smaller marsupials, such as bandicoots, quolls, potoroos and possum difficult in other states. In Tasmania these marsupials are still abundant and easy to view.

There are more than 150 bird species represented in the state's reserves including one of Australia's rarest bird species, the orange bellied parrot *(Neophema chrysogaster)* which breeds in the buttongrass moorlands of the Southwest National Park. There are eleven species endemic to the state.

Tasmania has extraordinary and readily accessible seabird and seal populations breeding on its numerous offshore islands.

Tasmania is host to a high number of endemic alpine species and extensive stands of Huon Pine *(Lagarostrobos franklinii)*, the longest living plant species in the world. Significant communities of tall trees such as the mountain ash *(Eucalyptus regnans)* – the world's tallest flowering plant (60 to 90 metres) are found in the state's forests.

Appendix I

What is special about Tasmania's Natural Areas

Some of the state's major wild rivers, such as the Franklin and Gordon rivers, have carved through the densely packed north-south mountain ranges that dominate the west of the state producing spectacular gorges such as the Great Ravine on the middle part of the Franklin river.
The Southwest National Park hosts some of Australia's deepest underground caves as well as the nation's longest cave, Exit cave.

The Quality of Tasmania's Environment

Tasmania's clean green image is more than a marketer's dream. It has been built upon the State's conservation record which includes one of the largest tract of high quality wilderness left in the world.

The quality of the state's many natural areas is attractive to visitors. Unlike some other destinations, it still possible to drink the water from our streams when walking, generally crowds are not a problem and many sites are sustaining current visitor use.

Accessibility

There is easy access to many natural areas. These places are also within short travelling distance from each other and Tasmania's many towns which can compliment and enhance a visitors stay.

Range of Experiences

This access together with Tasmania's natural resource, provides the visitor with a wide spectrum of choices. Some of the experiences available in this state are unmatched elsewhere in Australia.
The Southwest National Park, for instance, has some of the most challenging and remote walking in the nation. Similarly the Franklin Gordon Wild Rivers National Park offers white water rafting that few wild rivers elsewhere in Australia can match.

However these peak experiences are what few visitors actually experience.

The majority of visitors seek the more accessible activities which are found in Tasmania's many parks, reserves and forest areas.

Aboriginal and European Heritage

There is now evidence of human habitation in Tasmania 35,000 years ago. The archaeological sites which date back to the last ice age are a particularly rich source of information about human settlement. For example, Kutikina Cave in the Franklin River Valley contains evidence of human occupation spanning almost 5000 years and was the first Ice Age occupation site to be investigat-ed. Some 40 000 stone artefacts and 35 kilograms of bone material were found in less than one cubic metre at the cave site, making it one of the richest prehistoric sites known in Australia. Many of Tasmania's accessible-coastal areas also show aboriginal use of specific sites (eg. middens).

UNESCO has judged this wilderness to be one of the planet's great natural and cultural treasures. It is large enough and sufficiently undisturbed to sustain complete natural systems.

Some of the state's rich European history is part of the state's natural environment. Such history includes 19th century convict settlement (Sarah Island), evidence of historic pastoralism and animal snaring (Walls of Jerusalem, Central Plateau) and timber getting from the last century (huon pine logging on the Gordon river). There is also a rich history of exploration as exemplified by the expeditions of people like James Sprent and Lady Jane Franklin.

Antarctica and the Southern Ocean

Tasmania is the scientific and environmental research centre for two of the most important environments in the world - the Antarctic Continent and the Southern Ocean. As a resource base for tourism these areas offer a special nature based experience.

Tourism is a permitted use on Macquarie Island. The entire island is a nature reserve and it was internationally recognised by UNESCO as a Biospere Reserve in 1977.

Appendix II

The Roy Morgan Value Segments

These groups are described by Brian Dermott & Associates as follows:

Look At Me

Young people seeking an exciting life, to have a real fun time. They are living for today - tomorrow will take care of itself. They are fashion and trend conscious, active socially but not sophisticated or politically active.

Dolly magazine draws its highest readership from this segment, as do magazines such as *Countdown*, *Smash Hits* and *Rolling Stone*. They are also heavy readers of TV magazines.

Conventional Family Life

This is middle Australia, people whose life is centred around their families. They are skilled tradesmen or middle office workers with mortgages. Around 38 years old, on average incomes. They are not ambitious and prefer to spend time at home with family.

This segment shows the highest readership of such magazines as *Women's Weekly* and *Family Circle.*

Traditional Family Life

Refer to Section Five.

Something Better

Upwardly mobile younger couples, building up their business, career driven. Both earn good incomes, but borrow a lot to fund lifestyle. Over half have young children but the family is not central to their lives. They are confident, ambitious and progressive.

Better Homes and Gardens has the highest readership with this segment. They generally have a higher than the national average readership of all other homemaker magazines, and many of the women's magazines, except those specifically for fashion and youth.

Visible Achievers

Refer to Section Five

Young Optimist

The student generation, active, trendy, outgoing. Young singles or couples living together, at university or just started in a profession. Relatively well off, they collect new experiences, ideas and relationships. They are trend setters, ambitious and very career oriented.

Cleo, *Cosmopolitan*, *Vogue*, *Mode* and *Harper's Bazaar* have higher readership among this segment than with any other. Also popular are *Follow Me*, *Hero*, *Studio Collection*, *Vogue Living* and *Pol*. Of the men's magazines, *Follow Me Gentlemen* and *Men's Journal* rate highly. They are also more likely to read electronic and computer magazines.

Socially Aware

Refer to Section Five

A Fairer Deal

Working class and blue collar. Around 30, on low incomes struggling to make ends meet. They consider that they get a raw deal out of life, and are dissatisfied. They have money worries and employment insecurity. Not at all active, they tend to be home bound, watching television.

This segment shows the highest readership of such magazines as *TV Week*, *Australasian Post*, *People* and *Australian Playboy.*

Real Conservatism

Observers of society, rather than active participants. Tend to be very traditional and religion plays a bit part in their lives. Likely to be found on the land or in quiet suburbia. Financially well off. Travel is popular, especially caravans, fishing and other traditional holidays.

Readers Digest and *Family Circle* are relatively popular with this segment.

Basic Needs

Older retired workers and widows living (often alone) on a pension. Very traditional views with a strong Christian ethic. Feel vulnerable, seek protection and security. Follow a survival lifestyle. *New Idea* and *Women's Day* are the most popular with this segment.

National Ecotourism Strategy

EXAMPLES OF ACCREDITATION SYSTEMS AND ENVIRONMENTAL CODES OF PRACTICE

Name	System
Victorian Tourism Operations Association	Guidelines for Accreditation - outlines the requirements that must be met by tour operators wishing to become full accredited members of the Association. Includes four-wheel drive tours, horse trail ride operators and bushwalking and trekking (Aug '93).
Independent Tourism Operators of Tasmania	ITOT has established accreditation guidelines which it expects members to meet by June 1994.
Inbound Tourism Organisation of Australia	Guide Accreditation Programme - to obtain accreditation, guides have to pass either the Organisation's National Tour Guide Examination plus an interview or a tour guide course approved by the Australian Tourism Training Review Panel.
Ecotourism Association of Australia	Code of Practice for Ecotourism Operators. Guidelines for Ecotourists. Proposing to develop a "green star rating for ecotourism".
Australian Tourism Industry Association	Code of Environmental Practice.
Australian Tourist Commission	*Welcome to Australia - A Visitors' Guide to Sharing Australia's Environment and Heritage.*
Pacific Asia Travel Association	Code for Environmentally Responsible Tourism - identifies 18 specific responsibilities which make up the core of the Code.
Tourism South Australia	Environmental Code of Practice.
Institution of Engineers Australia	Environmental Principles.
New Zealand Tourist Industry Federations Inc.	Code of Environmental Principles for Tourism in New Zealand. Environmental Care Code.
United Nations Environment Programme	"Blue Flag" model of environmental performance standards and incentives for European beaches.
National Audubon Society	National Audubon Society Travel Ethic.
American Society of Travel Agents	ASTA's Ten Commandments on Ecotourism.
World Travel and Tourism Council	Environmental Guidelines. Environment Improvement Programs - "travel and tourism companies should seek to implement sound environment principles through self-regulation, recognising that national and international regulation may be inevitable and that preparation is vital". Based on principles established by the International Chamber of Commerce Business Charter for Sustainable Development. Environmental Impact Assessment and Audit Guidelines. "Green Globe" system.
Tasmanian Professional Trout Fishing Guides Association	Code of Ethics

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