

SOUTH AUSTRALIA'S NATURE-BASED TOURISM ACTION PLAN

Draft for public comment





South Australia is well and truly on the radar internationally, as a place to invest and do business.

Less well known are the state's abundant nature-based tourism opportunities. Many of these are growing quickly – others are waiting to be uncovered.

We are ready to show our wildlife and wild places to the world. This action plan sets out how this will be done. Its goal is to increase expenditure generated from trips that include nature-based activities in South Australia from \$1.1 billion to \$1.45 billion by 2020 and to generate 1000 new jobs.

This will require a determined and coordinated effort by traditional owners, tourism businesses, protected area managers, all levels of government and our regional communities. It will be achieved by focusing on five key areas.

Five key areas of focus

NEW INVESTMENT

Developing new and existing quality tourism experiences that set South Australia apart.

AN IMPROVED BUSINESS ENVIRONMENT

Building a business environment that is more conducive to investment and business growth.

BE CONSUMER LED

Inspiring and connecting our potential visitors with the South Australian offer.

BROADEN THE BASE

Establishing a broader foundation of community support for nature-based tourism.

MAXIMISE REGIONAL BENEFITS

Empowering regional tourism bodies to make things happen.





SOUTH AUSTRALIA – A PLACE WHERE PEOPLE AND BUSINESS THRIVE

In 2014 Jay Weatherill, the Premier of South Australia, announced his vision for the State – ‘South Australia is a place where people and business thrive’. The Premier’s vision will be achieved through 10 Economic Priorities. Economic Priority 5 aims to drive tourism growth:

South Australia - A growing destination choice for international and domestic travellers.

In addition, South Australia’s goal is to increase direct employment in tourism from 31,000 to 41,000 by 2020. This requires immediate action from all sectors. South Australia’s nature-based tourism sector will make a significant contribution to this goal.

The State’s premium food and wine, international arts festivals and sports events are already helping to establish South Australia as a destination of choice for travellers. These draw cards are complemented by the State’s magnificent network of wild places, national parks and marine parks.

South Australia’s special places include Indigenous protected areas, State and Local Government managed areas, land that is managed privately or by not for profit organisations and parks that are cooperatively managed by traditional owners and the South Australian Government. They cover over 21 percent of the State’s land and 44 percent of the State’s waters¹. They contain outstanding

examples of South Australia’s diverse wildlife, unique Aboriginal culture, flora and marine life, geology and landscapes, rivers, coastlines, islands and outback lakes and countless scenic routes and adventure trails. South Australians are committed to looking after these special places while also finding innovative ways to attract more visitors to the State, cultivating new business opportunities and creating more jobs

Throughout the world it is now accepted that appropriate nature-based tourism is not a threat to conservation. In fact nature-based tourism is now recognised as a primary strategy to engender a connection to nature, a love of natural areas and a lasting commitment to their conservation. Parks must be a place where people and business thrive to deliver long term conservation.

Our unique culture, captivating and accessible wildlife and spectacular landscapes will always be a source of pride for South Australians. These things are too precious to lose. However, by sharing these things with the world in a responsible way, the State’s nature-based tourism industry will become a far bigger direct employer. It will also contribute more to conservation efforts, generate more economic and social benefits for traditional owners and regional communities and support the livelihoods of many more South Australians.



NATURE-BASED TOURISM IN OUR ECONOMY

All trips that include a nature-based activity account for \$1.1 billion in expenditure in South Australia each year². There are more than 100 tourism businesses that directly utilise South Australia's national parks and many others that operate within marine parks, indigenous protected areas or privately managed protected areas. Nature-based tourism is already a very significant contributor to regional economies in some areas. For instance, on Kangaroo Island, an island renowned for its nature-based offerings, the tourism industry accounts for an estimated 61% of gross regional product to the local economy and almost 30% of regional employment³.

Visitors come to experience our special places, but during their visit also have significant expenditure on areas such as transport, accommodation, hospitality, retail and other associated businesses. In addition, our nature-based experiences strengthen our clean, green reputation, add to the recognition of quality South Australian agricultural and marine products, and showcase the appeal of South Australia as a place to visit, invest or live.

IS THERE SCOPE FOR FURTHER GROWTH?

The potential of nature-based tourism as a driver for sustainable economic development is enormous. Nature-based tourism is one of the world's fastest growing industries. The world's protected areas receive over 8 billion visits per year generating approximately \$820 billion (AUD) per year in direct in-country expenditure⁴. In Australia, the nature-based tourism sector contributes an estimated \$23 billion (AUD) to the economy each year⁵.

Nature is the number one driver of visitors to Australia. About 40 percent of all international visitors to Australia travelled to a national park in 2013-14. The proportion of international visitors who participate in nature-based tourism is higher in South Australia (77 percent) than the national average (74 percent), demonstrating the strength of our offerings⁶.

The potential for further growth in South Australia is demonstrated by the success of numerous unique, authentic and environmentally sensitive tourism products over recent years. For example, the popularity of diving with great white sharks in the Neptune Islands Group (Ron and Valerie Taylor) Marine Park has grown by more than 10 per cent in each of the past three years, with approximately 9,000 people participating in tours in 2013/14. The industry is now a significant contributor to the State's economy, contributing an estimated \$11.3 million in 2013/14, supporting 70 jobs⁷. Kangaroo Island's parks contribute over \$53 million per annum to the State's economy and support 360 jobs locally³.

South Australia has a host of existing destinations that are yet to reach their full potential; many are set to become major draw cards. Adelaide is the State's gateway, centrally located to allow visitors easy access to outback Australia, to marine parks and numerous established and emerging tourism regions, including the Mount Lofty Ranges, the Fleurieu Peninsula and Kangaroo Island, all of which have the potential for substantial growth in nature-based tourism. South Australia's parks offer personal challenge, adventure, solitude, Aboriginal culture, spectacular coastal scenery, caves, ancient outback landscapes and authentic encounters with wildlife.

South Australia's wildlife and wild places are our best kept secret.

With the support of traditional owners, local communities, government and the tourism industry more of South Australia's special places can capitalise on demand, become shining lights for the State's growing tourism industry and create 1000 new jobs.



HOW WILL WE CAPITALISE ON THIS OPPORTUNITY?

This action plan will initiate significant change. It is built around five focus areas:

- New investment - Developing new and existing quality tourism experiences that set South Australia apart.
- An improved business environment - Building a business environment that is more conducive to investment and business growth.
- A consumer led approach - Inspiring and connecting our potential visitors with the South Australian offer.
- Broaden the base - Establishing a broader foundation of community support for nature-based tourism.
- Maximise regional benefits - Empowering regional tourism bodies to make things happen.

The Action Plan recognises that nature-based tourism has the capacity to be a key driver of the State's economy and of job creation – particularly in regional communities. But to be successful, a different approach is needed, where traditional owners, State Government, local government, tourism industry and local communities all work together to foster and support the growth of nature-based tourism businesses and jobs.

YOUR VIEWS ARE IMPORTANT

This action plan has been prepared with advice from traditional owners, the tourism industry, State and local government agencies, non-government organisations, and members of the public, who expressed their aspirations and views for nature-based tourism during a series of workshops and online.

This action plan is now released for public comment to encourage your input. Your views will contribute to the refinement and finalisation of this action plan. Once finalised, it will be implemented by the South Australian Government in conjunction with other stakeholders and partners. The ten actions in this plan are just the start of a very significant change that will drive growth and job creation around an environmentally sustainable, vibrant and more progressive nature-based tourism industry across all of South Australia.



WHAT NEEDS TO BE DONE?

ACTION 1

CREATE OUTSTANDING NEW TOURISM EXPERIENCES

Nature-based tourism is a highly competitive global industry and visitors seek exciting, new and different tourism experiences. Once completed, projects like the Kangaroo Island Wilderness Trail will attract attention domestically and internationally, increase visitation and help consolidate South Australia's unique, nature-based tourism brand, stimulate opportunities for private sector investment in accommodation and enable the creation of new guided tour packages. This \$5 million initiative of the South Australian Government will rival other world-renown multi-day walks, such as New Zealand's Milford Track and the Overland Track in Tasmania. This project is expected to generate \$4.4 million per annum for the State economy and support 50 jobs.

Discussions with traditional owners, investors and the community will help the next 'big ideas' to emerge. Feasibility studies and cost/benefit analyses by investors (private and public) are essential. New tourism experiences can be created by opening previously inaccessible sites to the public, creating new parks, introducing new visitor opportunities at or around existing sites, trails and routes or refreshing sites through new 'state of the art' infrastructure or technology.

ACTION 2

OPEN UP NEW OPPORTUNITIES FOR PRIVATE SECTOR INVESTMENT IN PARKS

Building on the first action, there are many opportunities for the private sector to invest, or co-invest with Government, in the creation of new nature-based tourism experiences in parks. There is also potential for businesses to add value by offering accommodation, tours or support services to sites that are already up and running. This also includes private sector investment in sites which are currently managed under lease or on a commercial basis by the South Australian Government. For example the South Australian Government has commenced discussions with business leaders in China to secure investment in Cleland Wildlife Park as part of a partnership with Hong Kong's Ocean Park.

State Government will release an investment prospectus encouraging expressions of interest in potential new nature-based tourism ventures from the private sector and other organisations signalling South Australia's parks are 'open for business'. The expression of interest process will also stimulate the creation of partnerships to deliver new, innovative and low impact tourism experiences with traditional owners, the private sector, non-government organisations and other potential investors.





ACTION 3

CASE MANAGE NEW TOURISM PROPOSALS

Tourism operators have indicated that approval pathways for nature-based tourism ventures in parks are unclear. Operators will be provided with better information and dedicated case management to assist them. These things will help businesses to negotiate with traditional owners and government, and to help them understand the leases, licences, fees, planning controls, carrying capacity controls, limited permissions, approval processes and other considerations that may apply to park-based ventures. Businesses will also be offered start-up assistance such as mentoring, and the ability to negotiate a contribution to park management in lieu of fees.

A case management approach is already being used to fast-track the assessment of several investment proposals, such as the proposal to re-create the tourism offering at Martindale Hall in the Clare Valley.

ACTION 4

ENSURE THAT EXISTING BUSINESSES ARE SUPPORTED BY AN ENABLING POLICY ENVIRONMENT

Tourism developments are subject to the provisions of the Development Act. In addition, developments in national parks and marine parks are subject to the provisions of this legislation, associated regulations and adopted management plans. The policy and planning environment will be reviewed to ensure that it provides for a flexible range of contemporary tourism experiences while also ensuring that park values are protected.

Policy settings in several parks in the Mount Lofty Ranges were amended in 2013, enabling people to ride mountain bikes on specially designed trails for the first time in South Australia's parks. Following the success of this initiative, Government is now working with partners to further capitalise on the potential of this activity as a driver for tourism by establishing the Mount Lofty Ranges as an internationally recognised mountain biking destination.



ACTION 5

RAISE AWARENESS OF SOUTH AUSTRALIA'S UNIQUE APPEAL

Some of South Australia's nature-based experiences, especially those closer to Adelaide and other major regional centres, are already attracting large numbers of visitors. Other experiences are not yet uncovered, or are underutilised or emerging. Many of these are harder to get to and offer more solitary and challenging experiences. South Australia has a suite of star attractions. These include Aboriginal culture, outback and coastal landscapes, Naracoorte Caves World Heritage Area, Seal Bay Australian Sea-lions, pastoral stations, Cleland Wildlife Park, migratory shore birds, yellow footed rock wallabies, great white sharks, giant cuttlefish, Australian sea-lions, whales and dolphins. Focussing on a highly appealing point of difference – the diversity and accessibility of our wildlife, will assist differentiate South Australia in a highly competitive sector, maximise the return on marketing as well as reflect the essence of the South Australian experience.

Some visitors find it difficult to get the right information to plan and enjoy a nature-based trip to South Australia. In particular, it's not always easy to work out the best way to visit and link together a variety of experiences in different areas. To address this, better investment in visitor information provision and contemporary marketing that leverages against the well-established South Australian brand will be undertaken. This will require multi-lingual information, an open data framework and an integrated approach to marketing that builds on the success of tourism experiences that are already embedded in the market place.

The development of collaborative marketing tools that pick up on visitor interests, such as Birding Trails, Great Short Walks, or Marine wildlife must-dos will be developed to better provide relevant information for visitors. Supporting ways all nature-based tourism locations can leverage off and connect with wildlife is important.

ACTION 6

STREAMLINE ADMINISTRATION, LICENSING AND ACCREDITATION SYSTEMS

Reform of commercial tour operator licences granted under the National Parks and Wildlife Act is required to ensure that terms, conditions and fees are reasonable and that approval processes are clear, simple and timely. There is also scope to encourage greater industry self-regulation through accreditation. The Government will also be clearer about how licence fees contribute to park management and will invite licence holders to become involved in research, conservation programs and planning for tourism infrastructure.

The South Australian Government has introduced a series of licensing improvements to the shark cage diving industry including an increase in the licence term from 5 to 10 years. This provides the greater certainty that is required to support further investment in their businesses.



ACTION 7

HOST A NATURE-BASED TOURISM SUMMIT

This summit will generate momentum for change. It will showcase the State's remarkable opportunity for growth and enable everyone that is involved to explore opportunities to innovate and pursue growth. It will be a catalyst for people to access the experiences of others and will help businesses to identify, connect and attract potential customer groups.

Adelaide recently hosted the Clean Energy Council National Conference - the biggest renewable energy conference in Australia's history. This helped South Australia to progress its goals by raising awareness of the State's renewable energy agenda and by gaining access to international leadership and expertise in this field.

ACTION 8

CREATE AN INDUSTRY ADVOCACY GROUP

South Australia already has many successful nature-based tourism businesses that are striving to find ways to be more attractive and competitive. The sector is often not given due recognition for the benefits it provides. These businesses can create more jobs in regional communities through further growth. To do this a strong and unified voice is needed, however there is not yet an advocacy group in South Australia that is specifically dedicated to the interests of the sector.

RecFish SA advises government on recreational fishing issues and seeks to represent the interests of the State's recreational fishers. An industry advocacy group like RecFish SA is required to advocate for the recognition, support and growth of the nature-based tourism sector.



ACTION 9

EMPOWER AND BUILD THE CAPACITY OF COMMUNITY-BASED TOURISM NETWORKS

Natural and cultural attractions are a source of community pride and livelihoods. Their use as tourism assets is more likely to be supported by communities when the social and economic benefits are shared. There is a need to broaden public participation in nature-based tourism throughout the State through greater participation in partnerships, employment, research or volunteer activities. There is also a need to build capacity so that all aspects of a visit including information, transport, accommodation and a complementary range of tourism experiences are integrated and of high quality.

Community based tourism alliances can harness a collective and coordinated community effort that pools the passion, skill and knowledge of traditional owners, pastoralists, tourism businesses, visitor information centres, non-government organisations, friends groups, schools and universities, clubs, local communities and local and State government.

There are numerous community based tourism networks already operating across South Australia. The Adelaide International Bird Sanctuary 'Collective' is a new community based governance structure established for this newly created sanctuary on the fringes of Adelaide. 'The Collective' will empower traditional owners, volunteers, non-government organisations, scientists, local government, and State Government and others to work collectively towards the management of the sanctuary. A key opportunity will be establishing new tourism experiences focusing on migratory shore birds.

ACTION 10

ESTABLISH A 'WHOLE OF GOVERNMENT' LEADERSHIP TASK FORCE

A high level task force will be chartered with responsibility to aggressively drive change through the delivery of this action plan. This group will also oversee case management, support the start-up of tourism development proposals and will actively drive the establishment of new tourism destinations.

The Olympic Dam Task Force for example, was formed by the South Australian Government in 2006 to help the facilitation of the expansion of BHP Billiton's Olympic Dam copper, gold and uranium mine near Roxby Downs in the State's Far North region. This approach ensures that all people within and beyond the nature-based tourism sector are working constructively together towards the creation of jobs.



DETAIL OF ACTIONS

| Action | What will be done? |
|------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Action 1 Create outstanding new tourism experiences | <p>1.1 Work with partners to identify the next 'big ideas'. Investigate the return on investment that could be achieved by creating a series of new tourism experiences. This may involve the creation of new visitor sites or the development of new tourism focused infrastructure that creates new business opportunities.</p> <p>1.2 Invest in a program of new (or refreshed) tourism sites.</p> |
| Action 2 Open up new opportunities for private sector investment in parks | <p>2.1 Prepare and release a prospectus seeking ideas for investment in new or improved nature-based tourism experiences in parks.</p> <p>2.2 Seek expressions of interest in specific investment opportunities, including accommodation on the Kangaroo Island Wilderness Trail.</p> |
| Action 3 Case manage new tourism proposals | <p>3.1 Establish a team to case manage proposals (and drive 2.1 & 2.2 above).</p> <p>3.2 Develop a package of information for prospective investors.</p> |
| Action 4 Ensure that businesses are supported by an enabling policy environment | <p>4.1 Conduct a review of legislation, regulations, policies and plans to identify barriers to sustainable nature-based tourism development.</p> <p>4.2 Implement priority changes to the planning and policy environment to remove undue barriers.</p> |
| Action 5 Raise awareness of South Australia's unique appeal | <p>5.1 Develop a marketing plan and program of strategic investment in marketing for the State's star attractions.</p> <p>5.2 Strengthen the profile of the States 'star attractions' in South Australia's Brand and establish a cooperative marketing program to promote distinctive South Australian nature-based tourism experiences.</p> <p>5.3 Develop an open data framework and establish a web platform that enables businesses, scientists, schools, traditional owners, volunteers and local people to link together and develop nature-based tourism in their area.</p> <p>5.4 With a focus on the State's 'star attractions', improve visitor information so that visitors can access information in languages other than English, more easily plan, book and enjoy a nature-base trip.</p> |



| Action | What will be done? |
|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Action 6 Streamline administration, licensing and accreditation | <p>6.1 Simplify and clarify commercial tour operator licences.’</p> <p>6.2 Scope opportunities to progress towards industry self-regulation in conjunction with the South Australian Tourism Industry Council and Eco-certifying entities.</p> <p>6.3 Develop a rewards and recognition package for tourism operators who provide returns to conservation.</p> |
| Action 7 Host a nature-based tourism summit | 7.1 Organise and conduct a South Australian nature-based tourism summit. |
| Action 8 – Create an industry advocacy group | <p>8.1 Seek recommendations on the formation of this group from the South Australian Tourism Industry Council.</p> <p>8.2 Establish and convene the group</p> |
| Action 9 Empower and build the capacity of community-based tourism networks | <p>9.1 Conduct a series of regional forums to initiate the creation of local and regional support networks.</p> <p>9.2 Provide ongoing support to traditional owners and regional communities to help develop nature-based tourism experiences.</p> <p>9.3 Establish a capacity building program that will help regional communities to deliver integrated and high quality tourism experiences and support services</p> |
| Action 10 Establish a ‘whole of government’ leadership task force | <p>10.1 Assign key personnel and dedicated resources to the nature-based tourism task force.</p> <p>10.2 Establish operating arrangements to enable the task force to operate efficiently and authoritatively across Government departments.</p> |

¹ Department of Environment Water and Natural Resources database (2015)

² BDA Marketing Planning (2015).

³ Hudson Howells et al. (2002) Assessment of the Economic Impacts of the Protected Areas of Kangaroo Island.

⁴ Balmford A, Green JMH, Anderson M, Beresford J, Huang C, Naidoo R, et al. (2015) Walk on the Wild Side: Estimating the Global Magnitude of Visits to Protected Areas.

⁵ Griffith Institute for Tourism & Tourism Research Australia (2014) Nature-based Tourism in Australia.

⁶ Tourism Research Australia, 2014, International Visitor Survey

⁷ SATC (2014) unpublished report.





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www.environment.sa.gov.au