



Australian Government
Director of National Parks

Joint Standing Committee on Northern Australia
PO Box 6021
Parliament House
CANBERRA
Canberra ACT 2600

Dear Hon Warren Entsch MP

Thank you for the opportunity to provide input to the Joint Standing Committee on Northern Australia inquiry into opportunities and methods for, and impediments and challenges to stimulating the tourism industry in Northern Australia.

We work with traditional owners and tourism businesses at Uluru-Kata Tjuta National Park and Kakadu National Park in northern Australia, so we value the work of your committee in assisting us with our vision for these parks and communities, services and businesses, including those at Jabiru and Muġitjulu.

Parks Australia also manage a network of marine parks, some of which are in northern Australia, including the Coral Sea.

We're looking forward to talking with you and the committee on 17 February.

We would be pleased to provide further detail or clarification on any of the content, should this be of interest to the inquiry and look forward to continuing to work with our partners on the amazing destinations we manage in northern Australia.

Yours sincerely

Sally Barnes
Director of National Parks

13 February 2017



Australian Government
Parks Australia



Director of National Parks
SUBMISSION TO THE INQUIRY INTO OPPORTUNITIES
AND METHODS FOR STIMULATING THE TOURISM
INDUSTRY IN NORTHERN AUSTRALIA





PARKS AUSTRALIA



Parks Australia conducted market research in July 2016, defining the market segments and identifying the drivers for, and barriers to, visitation. One of the findings was that our Northern Territory parks, Kakadu and Uluru, have very high awareness (80% of Australians know about them) but low knowledge (5% know what is there and what to do). The word cloud above was people’s response to the question “Thinking about interstate national parks that you would like to visit... Which parks can you think of?”.

We found that intent to visit is high, with roughly a quarter of the Australian population having the parks on their ‘bucket list’, but the conversion into visitation is relatively low, especially for Kakadu.

Parks Australia - Customer-focused conservation

About Parks Australia

The Director of National Parks is the statutory agency responsible for the Australian Government’s terrestrial and marine protected-area estates. The Director is assisted by staff within Parks Australia, a division of the Department of the Environment and Energy.

We manage six national parks and 59 marine reserves-a rich and fascinating range of ecosystems and communities, from spectacular oceanic islands and the tropical wonderland of Kakadu, to the coastal habitats of Booderee and the spinifex sand plains of arid Uluru-Kata Tjuta. Three of our national parks are leased by their Aboriginal owners to the Director of National Parks to be jointly managed by their traditional owners and Parks Australia.

We want to showcase these natural wonders to the world, demonstrating to all why these places are so special and inspiring people to become more invested in their care and future.



Australian Government
Parks Australia



RESILIENT PLACES



AMAZING DESTINATIONS



MULTIPLE BENEFITS

Our vision and goals

Parks Australia's vision is 'outstanding natural places that enhance Australia's well-being'. To achieve this, we have three core goals:

1. Resilient places and ecosystems

The conservation of natural and cultural values is a core purpose. Revenue generated by visitors is invested back into the park, into natural and cultural resource programs.

2. Amazing Destinations

Increasing visitation and length of stay, by enhancing the parks' tourist infrastructure and tourism product is a key goal. Every year both parks attract just under 500,000 visitors, with approximately 27% of visitors coming from overseas. Market research shows an average of just over 3 nights per stay at both parks. This adds an estimated \$320m to the Northern Territory regional economy.

Another key measure is visitor satisfaction. Both Uluru and Kakadu have very high satisfaction ratings: 90%.

2. Multiple benefits to Traditional Owners

The Commonwealth Government leases the parks from the Traditional Owners, who receive a percentage of all revenue as part of the lease agreement. The Traditional Owners welcome local and international visitors to enjoy their land, and are involved in all decisions relation to tourism ventures and visitor experiences, through the park's board, which is primarily comprised of Traditional Owners, and Land Council consultations.

Traditional Owners are interested in:

- Sharing their land, and its stories, with visitors.
- Keep people who are on their land safe.
- Generating jobs, livelihoods, and income from their land and its assets.

Additionally we manage the Commonwealth Marine Reserves. We're working this year to provide certainty to businesses by finalising sanctuary zones for these reserves and seeking new opportunities for sustainable ventures.



Formation of a Tourism and Marketing team

We strive to be a customer-focused conservation agency that's easy to do business with. In 2015 we set up the Customer Experience & Destination Planning team, whose aims are to increase the range of tourism products on offer in the park, promote these experiences and the parks' values, and build the brand equity and reputation of the parks.

We share the goals of Tourism NT to grow value, address supply constraints, improve the visitor experience and improve business sustainability. We work closely with both Tourism NT and Tourism Australia to deliver products in partnership with businesses that fit these goals.

The team, along with staff in the park, recently entered Kakadu in the Northern Territory Tourism 'Brolga' awards and won the award for *Best Major Tourist Attraction*. Kakadu is now facing off against the likes of Sydney Harbour Bridge Climb at the National Awards later this month.

Terms of Reference 1: Domestic and international tourism comprising: recreational, environmental, cultural, educational, and industrial tourism

THE OPPORTUNITIES

Kakadu and Uluru's competitive strength is the delivery of visitor experiences that are a unique blend of the natural and cultural experiential offering in a World Heritage setting. Consumer awareness may be high but the challenge is converting to actual holiday bookings.

The World Heritage values (both natural and cultural) combined with the diversity of landscapes and habitats (particularly in Kakadu) provide significant potential for nature and culture based tourism as well as educational tourism.

Refinement and increased sophistication, with an ROI-focus, in marketing of destinations to key domestic and international markets is required. Research conducted by Parks Australia has indicated that our parks attract four key market segments:

- 'Family Stage', who are driven by a desire to introduce their children to Australia's natural and cultural values.
- 'Experience Seekers' who want a diverse and active experience.
- 'Nature Valuers' who are 'balanced' by immersion in nature.
- 'Social Explorers' who are primarily driven by the parks' cultural values and events.



We recognise that technology and social media is a driver in the way consumers research, share and book travel products. Digital is now the primary source of travel inspiration for leisure travellers who use online sources (eg YouTube, Social Media channels, Trip Advisor). Increasingly more travellers are using smart phones throughout the visitor cycle (wishing, planning, booking, experiencing, departing and remembering), and booking via a smart phone is increasing.

Consequently, a focus for Parks Australia is on digital marketing, as the team revamps the website in early 2017, offering better navigation, inspiration and planning tools. While Parks Australia is enjoying solid growth in website traffic, there is plenty of upside as we enable visitors to better understand the park offering and plan their trip.

Social media engagement is another key platform and Parks Australia has driven outstanding, triple figure growth in both reach and engagement. Across the key platforms (primarily driven by Facebook) we currently reach over 15 million people and have exceptional engagement numbers (likes, shares, comments on posts).

Making transactions with visitors and businesses more streamlined by moving to online services for park passes, campground bookings, permits, and events. Kakadu recently moved to online park passes. This resulted in an increase in park pass sales of 14% delivering an additional \$0.5m in revenue. This was due to improved distribution and ease of transaction. We are currently in 'Discovery' phase in moving Uluru ticketing online.

Kakadu National Park

Parks Australia is investigating opportunities for a range of new visitor experiences, developed in partnership with Indigenous communities and commercial tour operators.

Over the next three years, Parks Australia plans to scope opportunities for a wider range of visitor experiences to meet the needs of market segments identified in quantitative and qualitative research conducted in July 2016. We will work with indigenous communities and tour operators in bringing these opportunities to market, should they prove viable.

We are presented with an opportunity and a challenge. Kakadu is huge and with such diversity requires a substantial amount of time to immerse, experience, understand and enjoy. Increasing the range of tourism product (tours, accommodation, food) will offset the time/distance factor as it becomes a 'week long' destination and justifies the time and cost.

Upgrading and refreshing existing infrastructure, both private and government owned, is needed to maintain the standard of excellence expected by visitors to this World Heritage area and to remain competitive with other destinations. Improvements to roads and walking tracks and, for example, investing in infrastructure that allows safe swimming at certain sites, comes at a considerable cost, and accessing funding and demonstrating return on investment can be a challenge.





Fundamentally, public investment in infrastructure improvement and tourism training provides the foundation for growth of private investment.

Some of the tourism development opportunities include, but are not limited to:

- Implementation of a Walking Strategy, catering to the clear demand for both short walks and multi-day walks.
- Voluntourism products - potential for visitors to pay to experience and contribute to remote community projects, threatened species conservation activities and research/citizen science. There is demand in the market for this type of experience.
- An event strategy that serves to both stimulate demand in key segments, and promote the parks values. Themes include: Indigenous food and activities such as mountain biking and bird-watching.
- Safe crocodile viewing experiences, could include underwater viewing facility in a river or large billabong;
- Safe swimming experiences/opportunities (given crocodiles), may including hardening of sites, or provision of alternative facilities;
- Exclusive helicopter tours of landmarks and significant art sites with Indigenous tour guides;
- Education products and tours – the natural and cultural values and experiences in the park are aligned to the education curriculum. Also potential for education/school/scouts on country camp. Engaging with the ‘Family’ market, and raising awareness of our parks’ values among travellers of the future is important.
- Products for niche markets including extended overnight bushwalking, mountain biking, birdwatching (e.g. Kakadu Bird Week) and photography.
- Industrial Tourism – various heritage, mining, pastoral sites with associated stories still in living memory for both Indigenous and non-Indigenous people. Visitor experiences at these sites would be of less interest to the international market, however the domestic market (over 50s) would enjoy this type of tourism.
- Accommodation/experiences including eco-lodges and safari camps that are integrated into the environment. There is a lack of fixed accommodation in the park and our research has demonstrated a strong need for this within the Experience Seeker segment
- Immersive cultural experiences (home-stays, school camps and community visits).
- Furthermore, once skills are developed, supporting start-up businesses, particularly cultural touring, in the form of grants and training is needed.
- Quality dining experiences, particularly with a local foods (including bush tucker) focus. Research conducted in 2016 showed a clear demand for ‘healthy takeaway food’ in two key segments.
- Direct access to Kakadu via Jabiru airport by repurposing the Jabiru airport to a commercial airport, with links to Darwin and other capital cities, post mining.

Developing cultural experiences also requires support of indigenous development through training, mentoring and access to grants. A regional or hub approach to supporting indigenous businesses in the Kakadu region including administration and booking systems could encourage more businesses to be established and make them more sustainable. In addition a regional training centre in tourism and hospitality located in Jabiru would support these businesses and provide employment opportunities for local indigenous communities.



Uluru-Kata Tjuta National Park

The Board released an Expression of Interest for Big Ideas for tourism ventures in Uluru. Three activities have been approved and are, or are soon to be, operational. A number of opportunities are currently being discussed with interested parties, including some significant 'game changers' and smaller indigenous enterprises.

Education product and tour opportunities - Uluru captures the imagination of people from around the world, including school-aged students. There is clear demand for ranger provided tours and experiences. A plan is being developed to cater for this demand as a self-funding product.

More Indigenous cultural experience product and business development is required. Parks Australia will continue to work with local tour operators, business and training providers to give Anangu youth opportunities to experience working in tourism via an internship program. This will be complimented by a tailored certificate program being developed by Charles Darwin University for those individuals interested in formally recognised training. It is hoped that the combination of the internship and training will encourage greater Indigenous participation and employment in tourism.

Marine

Parks Australia is responsible for the management of Commonwealth Marine Reserves off the northern coast of Western Australia, the Northern Territory and west Cape York. These reserves are situated in Commonwealth waters, which generally extend from three nautical miles offshore to the outer limit of Australia's Exclusive Economic Zone (200 nautical miles). Our northern marine reserves are home to a diverse array of species that depend on the warm waters and wide range of muddy, sandy, and rocky habitats, including corals, sponges, sea cucumbers, sea squirts and many different types of sharks and tropical fish.

Parks Australia has commenced the formal process to develop new management plans for the Commonwealth Marine Reserves in northern Australia. As part of the transition to active management and our overarching goal to help create and support amazing destinations, Parks Australia is currently exploring opportunities to stimulate and enhance tourism in marine reserves, focused on:

1. Working with commercial tourism operators and small businesses in adjacent regions to support existing tourism experiences while also looking at opportunities to develop new visitor experiences in Commonwealth Marine Reserves;
2. Developing new and engaging content about our marine reserves that will enhance the appeal of visitor experiences and raise awareness of the natural and cultural values of Commonwealth Marine Reserves; and
3. Providing an underlying framework for managing tourism and visitor use that will enable growth of the tourism industry, overcome perceived barriers, and protect and conserve the values of our marine reserves.

Parks Australia is interested in opportunities to partner with State and Territory governments, relevant tourism organisations and commercial operators to maximise the contribution of Commonwealth Marine Reserves to the visitor economy in northern Australia. This could include support for world class natural and cultural visitor experiences such as recreational fishing or nature watching charters, conservation tourism, citizen science experiences, or Indigenous cultural tours to provide multiple benefits to the partners involved.



IMPEDIMENTS AND CHALLENGES

The Northern Territory is perceived as an expensive visitor destination. Things are far away and difficult to get to. This can be addressed through investment in roads, air access and connections between regional tourism businesses. Development and funding of an inter-governmental road and infrastructure strategy would deliver positive returns of investment to the area.

There is a limited range of accommodation in Jabiru, and the Indigenous Business Australia-owned property Coinda Lodge, an hour further south. Other than that, there is no fixed accommodation within the park. For people wanting to experience the waterfalls and billabongs in the centre and south of the park, the options are to camp, or face a long and difficult drive. This concentration of hotel and lodges in the north of the park both limits appeal to key segments, and inhibits dispersal throughout the park.

In order to sustainably and effectively engage indigenous people in tourism, training and capacity building for Indigenous experience and business development is of high importance. Training establishes the skills needed to work in the tourism field and business development support can facilitate small business start-ups. Demand for 'authentic' tourism experiences continues to grow and supply is yet to catch up.

As visitor numbers continue to rise, we need to maintain integrity of the offer and infrastructure to suit market segments. An on-going capital and asset investment strategy is required and being developed. Additional pressures will be placed on existing the infrastructure, as well as the need to develop new infrastructure for new experiences and to help facilitate private investment.

Getting agreement from Traditional Owners and all relevant Aboriginals can take time. Involvement of Land Councils, extensive consultation periods and Board of Management approvals can prolong the time needed to secure new business opportunities. Commercial partners need to understand cultural responsibilities and custodianship requirement of Traditional Owners in using their land and include these set requirements into their planning and investment strategies.

Ongoing investment is needed in tourism infrastructure in Kakadu and Uluru to maintain the experience at these destinations.

There are challenges in attracting, retaining and developing skilled staff in remote locations.:

- Remote localities have limited offerings (school, health facilities and extra curricula activities, making them less attractive.
- Visitation in the NT is highly seasonal with associated challenges for business development and managing a seasonal workforce. While a 'wet season' strategy will help avoid the peaks and troughs, there is a limit to what can be achieved.



- Seasonal staff and high staff turn-around also leads to risk of inconsistent service level and provision of visitor information (wrong info or no info which detracts from sense of welcome to visitor hubs).
- Lack of development and training opportunities in remote localities limits the tourism workforce and can limit the customer service approach.

Kakadu National Park

Due to climatic conditions, investing in all-weather infrastructure, particularly roads and bridges, will broaden the tourist season and consequently increase visitation. This increase is sustainable, as the demand is spread throughout the year rather than boosting numbers in the high season. This is both a Commonwealth and NT Government issue.

During “peak” season (June-September), prices are much higher and car hire is unavailable (and unaffordable).

Land scheduling, and any outstanding clarification about who to consult, in the west and South Alligator regions of Kakadu needs to be finalised before opportunities can be developed.

No commercial flights directly into Kakadu adds to the perception that Kakadu is hard to get to and hard to get around. Visitors have to get a flight to Darwin and then join a tour or hire a car. There is no capacity to hire a car in Jabiru, limiting travel options once inside the park.

Lack of accommodation/housing available in Jabiru (for Parks Australia and commercial staff), limits workforce for new investment and business development.

The continued viability of the residential and tourism town Jabiru, and the maintenance of services such as the supermarket and cafes, is needed to transform its economic base from mining to tourism (due to the impending closure of the Ranger uranium mine in 2021). This will be critical to tourism and other businesses that make a significant contribution to regional and local economies.

The size and remoteness of Kakadu makes a sense of arrival and welcome for visitors at various entry points challenging.

Promoting croc-wise behaviours while also providing swimming opportunities (also an opportunity) - challenges appropriate infrastructure development.

Uluru-Kata Tjuta National Park

An Asset Revitalisation Strategy is being developed. Major assets in need of reinvigoration include:

- Cultural Centre, which needs to become a hub of visitor information, tour operator bookings and provide for the provision of a world class cultural immersion experience.
- Valley of the Winds walking track to improve safety and visitor experience.



Terms of Reference 2: The role of peak bodies, local communities, and all levels of government in developing and promoting tourism opportunities nationally and internationally, including regulations and workforce issues that may inhibit tourism development.

- Parks Australia, NT Parks and Wildlife and Tourism NT work together to deliver a collaborative approach on visitor research with the aim to share data and findings. Continuing these efforts will benefit all bodies involved in tourism in the NT.
- Regional approaches to experience development, joint marketing and events planning could benefit both state and commonwealth managed parks in the NT.
- Potential for cluster or collaborative of NT Indigenous Tourism Operators (model similar to WAITOC – WA Indigenous Tourism Operator Council).

Terms of Reference 3: Communication and transport infrastructure (particularly air, sea, road and rail transport and port infrastructure) which may facilitate and grow tourism.

Parks Australia alongside Tourism NT has developed Wi-Fi at key sites at Uluru and Kakadu.

Kakadu National Park

- Alignment, strategy and funding for NT Government and Kakadu road upgrades, to improve wet season access to key visitor sites including Cahills Crossing and site openings after wet season to allow better tour operator access (e.g. Kambolgie Creek Crossing) will be critical to growing visitation.
- The closure of the Ranger Uranium mine by 2021, a mine surrounded by Kakadu National Park, operated by Energy Resources of Australia (ERA), and the withdrawal of ERA from the township of Jabiru presents a significant risk and also an opportunity for the local communities within the park.
- The 24 August 2016 decision on a native title claim may also have implications for the future direction of the town. Parks Australia is working with all stakeholders, including the Northern Territory government, the tourism industry, ERA, traditional owners and relevant Australian Government agencies towards a transitional solution that will stimulate and facilitate public and private tourism investment in Jabiru and the surrounding Kakadu National Park.
- Improve telecommunications across the park including more remote phone/Wi-Fi hotspots in key visitor hubs and entry bays is required to allow visitors access to digital technology information about opportunities available in the park and to encourage online booking and purchase of products. Improved technology will also improve visitor safety.
- Exploring ways to build on the fishing market such as supporting businesses to hire out fishing boats in Kakadu – currently visitors hire boats in Darwin and drive all the way into the park. Also leveraging off marketing campaigns like the NT government's 'Million-dollar Fish' promotion.



Uluru-Kata Tjuta National Park

- The park has sealed roads, sealed visitor car parks, toilets, a series of unsealed tracks and marked walking tracks, a cultural centre, park headquarters, maintenance yard and workshop, park entry station, lookouts, staff housing and associated water, sewerage and electrical generation, treatment and reticulation infrastructure to service these assets. The Director of National Parks currently provides power and water services to the Mutitjulu Community.
- There are many challenges related to the management of infrastructure on the park, including Mutitjulu Essential Services, as much of the infrastructure is coming to the end of its useful life or needs significant investment to increase its life. The Director was in negotiation with the NT Government to transfer responsibility for essential services. These discussions should recommence as a priority.

RECOMMENDATIONS FOR ACTION

- 1. A regional approach to destination planning and marketing with priority being improvements to road and visitor infrastructure to increase access and service the needs of market segments.**
- 2. A coordinated approach to developing Indigenous tourism businesses and skills to support a diverse range of cultural products and opportunities for local people.**
- 3. Continue effort by Commonwealth and NT Governments and major stakeholders to maximise opportunities to transition Jabiru from a predominantly mining town to a major tourism hub, reflecting quality and unique visitor services and tourism experiences commensurate with Kakadu's World Heritage status.**

We would be pleased to provide further detail or clarification on any of the above, should this be of interest and look forward to continuing to work with our partners on the amazing destinations we manage in northern Australia.

