

KAKADU



WALKING TO THE FUTURE... TOGETHER

A SHARED VISION FOR TOURISM IN **KAKADU NATIONAL PARK**

A report by John Morse AM, John King and Jennifer Bartlett



Australian Government
Director of National Parks



THE NORTHERN TERRITORY

KAKADU



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Prepared by John Morse AM, John King and Jennifer Bartlett
February 2005

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INTRODUCTION

Kakadu National Park is a timeless place.

This ancient landscape is a place of exceptional beauty and great diversity.

From the mangrove-fringed tidal plains in the north to the flood plains, the lowland hills and the sandstone cliffs of the Arnhem Land escarpment, it is a place which changes with the seasons. Teeming with wildlife in the water, on the land and in the air, there are many species which provide a diversity and concentration seen nowhere else. The land takes on different forms and different colours with the passing of each season. This cycle has been repeated for millions of years and will continue.

Kakadu has been home to Aboriginal people for more than 50,000 years. Here a culture rich in spirituality, tradition and respect has cared for the land. Sharing and looking after country have always been part of the Kakadu story.

The Traditional Aboriginal Owners of the land are known as Bininj in the north and Mungguy in the south. In 1979 they leased their land to the Australian Government as a National Park and opened it to visitors. When the park was named a World Heritage Area it became known internationally as a special place. People from all over the world realised that this extraordinarily beautiful land, its ancient cultural heritage and its wildlife must be respected and protected forever. They also wanted to experience what Kakadu offered.

In the last 30 years tourism has brought millions of visitors to Kakadu. During that time much has been learnt by the Traditional Owners, park management and the tourism industry. The time has now come to create a long term tourism vision for Kakadu – one which will protect and manage its priceless natural and cultural heritage, deliver more rewarding experiences for visitors and bring ongoing benefits to Bininj/Mungguy.

The Fifth Management Plan will be the key vehicle for carrying the tourism vision forward.

PART ONE



SHARED TOURISM VISION – THE BACKGROUND

"Kakadu is my home, with special places and special stories..."

Quote from an Aboriginal Elder

THE CONTEXT

Kakadu National Park is a World Heritage area, jointly managed by its Traditional Owners and the Australian Government through the Kakadu Board of Management and the Director of National Parks. Approximately half of the park is Aboriginal land under the *Aboriginal Land Rights (Northern Territory) Act 1976*, and the remainder is land under claim. Aboriginal people have occupied the Kakadu landscape for at least 50,000 years and during that time the land and the culture of the Aboriginal people have become intertwined.

The Traditional Owners have, through Aboriginal Land Trusts, leased their land to the Director of National Parks for a national park. Kakadu National Park was first declared in 1979 and has since been extended and given World Heritage status, in recognition of its outstanding natural and cultural heritage values. Park management works to the park lease and management plan, under the direction of a board comprising a majority of Traditional Owners representing Kakadu's Aboriginal communities.

The primary aims of park management are to protect and conserve Kakadu's natural and cultural values, to promote the interests of the Traditional Owners, and to encourage appropriate public use and appreciation of the area. In this context, an important aspect of Kakadu is the opportunity it offers for people to learn about and experience Aboriginal culture and the natural environment through tourism.

Since the establishment of Kakadu National Park tourism has at times developed rapidly and often without Traditional Owners' involvement. Traditional owners did not expect tourism to develop to the extent it has, nor for it to impact on their lifestyles the way it has. For example, the setting aside for visitors of areas that were traditionally used by Aboriginal people has largely excluded Traditional Owners from these areas. Traditional Owners often feel that tourism is 'the boss of country' and that they have little say in how tourism is managed. Traditional Owners are also concerned that they receive few direct benefits from tourism. Despite these issues the Kakadu Board of Management and Traditional Owners realise that appropriate tourism can have positive impacts and provide benefits for their communities. They welcome visitors who wish to learn about, appreciate, respect and experience Bininj/Mungguy culture and country. They welcome tourism that is ecologically sustainable, safe and culturally appropriate.

THE BRIEF

In May 2004 the Director National Parks, on behalf of the Kakadu Board of Management and the Australian and Northern Territory Governments, commissioned us to develop the first stage of a new shared tourism vision for Kakadu National Park.

The project required us to:

Develop a shared vision for tourism in Kakadu National Park. The vision must reposition Kakadu National Park as a unique destination with exceptional natural and cultural attributes; it must be effectively owned by key stakeholders and capture the public imagination.

The brief also required that:

- the vision will reflect the views and aspirations of the park's Traditional Owners and acknowledge their rights and culture;

- the vision will respond to the desire of the tourism industry for an agreed framework and a clear direction for planning and investment;
- the vision must be consistent with the objectives of the Northern Territory and Australian Governments to reposition Kakadu as an Australian icon of international significance, to enhance the capacity of Traditional Owners to manage country, to fulfil the aspirations of visitors and to build a sustainable tourism industry with long-term economic benefits;
- the vision must clearly recognise Kakadu's natural and cultural values and World Heritage status, and be consistent with wider Australian tourism strategies under Brand Australia;
- the vision and its brand positioning will provide a strategic platform to take Kakadu tourism forward. It will feed into the fifth Kakadu Management Plan, guide relevant Territory, national and international marketing strategies, and lay the groundwork for investment in infrastructure and capacity building.

In preparing the first stage of the shared vision, we were asked to:

- conduct an extensive analysis of existing research and information sources;
- consult with key stakeholders, including, but not restricted to Traditional Owners, Board of Management and Parks Australia personnel, Northern Territory Tourist Commission, Tourism Top End, Northern Territory and Australian Government representatives, and tourism operators from Australia and key overseas markets;
- undertake a physical appraisal and audit of park tourism assets and potential experiences, as well as physical and cultural constraints;
- make recommendations for appropriate brand positioning including the unique attributes of Kakadu;
- advise on the development of brand personality, attributes and values and a unique selling proposition for Kakadu National Park;
- undertake verification consultations to ensure Traditional Owner and stakeholder agreement with and ownership of the vision;
- produce a publication to represent the shared vision of Kakadu National Park;
- advise on the production of a complementary video;
- suggest actions that will ensure the vision will be realised.

Subsequent to this project will be a second stage involving the development of an implementation strategy.

THE PROCESS

From the outset, it was acknowledged that 'getting people on board' the process is as important as the development of a shared vision and brand position for Kakadu National Park. Whilst the consultation process directly associated with this project was undertaken in a relatively short time period, we have drawn on the wide consultations and papers already developed for the Fifth Management Plan, as well as other related sources.

There are many differing opinions as to how Kakadu should be managed, operated and promoted. However, we have found a unanimous view that the first priority must be the protection and conservation of Kakadu's stunning landscapes and huge range of Australian plants and wildlife. At the same time there is broad agreement on the importance of tourism to the park's future and the need for a more focussed tourism strategy. This strategy must ensure protection of the park's natural, cultural and historic values and sustainability of its tourism operations.

The shared vision for Kakadu National Park provides an important foundation and direction for:

- the Fifth Management Plan;
- a proposed marketing strategy;
- a recommended Tourism Masterplan.

In the past, lack of involvement has led to a lack of direct benefits for Bininj/Mungguy. For the further development of the vision, it is critical that there be a thorough and ongoing consultation process with all stakeholders, particularly the Traditional Owners.

RESPECT FOR COUNTRY AND PEOPLE

In creating the shared tourism vision, we identified ten key principles.

1. Kakadu is first and foremost home to Bininj/Mungguy. They will influence, manage, encourage and participate in the development of tourism from which they gain economic and social benefit, at a pace and level they determine.
2. Bininj/Mungguy have leased their land to the Australian Government to be jointly managed as a national park to protect and manage its priceless natural and cultural heritage.
3. All parties will recognise and enhance the protection of Kakadu's diverse landscapes, internationally important wetlands and spectacular plants and wildlife.
4. Tourism should not be 'boss of country'. The progress and development of tourism will be undertaken in accordance with the wishes of the Traditional Owners and at a pace which is consistent with their own values and aspirations.
5. All parties will respect the wish of Bininj/Mungguy that tourism develop at an agreed pace and level which harms neither nature or culture.
6. Respect for customary law and traditions will underpin all tourism decisions.
7. All parties will respect the need for Bininj/Mungguy to retain their privacy, to use their land for hunting, fishing and ceremony and to protect and hold private their sacred stories and sites.
8. Aboriginal culture and the land on which it is based will be protected and promoted through well-managed tourism practices and appropriate interpretation.
9. The travel and tourism industry will have security of tenure, profitable investment and the opportunity to provide authentic and memorable visitor experiences, within the context of a commitment to respecting culture and country.
10. Kakadu National Park will be recognised as one of the most significant natural and cultural World Heritage areas, offering visitors a range of enriching and memorable experiences.

PART TWO



OUR FINDINGS

*"My children got to hang onto this story
This important story
I hang onto this story all my life
My Father tell me this story
My children can't lose it
Our story is in the land
It is written in those sacred places..."*

Bill Neidjie

CURRENT SITUATION

THE IMPORTANCE OF IDENTIFYING TRENDS IN TRAVEL AND TOURISM

People need reasons to travel. Until recently people travelled to discover places and do things that were new and exciting. Today the world is much smaller. Images of the most exotic places are being brought into our homes through television and the internet. The motivations for travel are changing.

In addition many people who travel are increasingly wealthy, but are short on time so they want to gain even greater value from their travels.

Changes in people's attitudes and the things which interest them are driving more and more travel decisions. For example, changing community attitudes to the environment have led to a greater desire for nature-based tourism. Places that are more environmentally sustainable and supportive to local communities have grown in popularity.

Many people want to achieve personal goals or to escape from work or lifestyle pressures. They want change, authenticity, personal challenges and the opportunity to enrich their lives with new experiences and insights. Increasingly people are wanting to engage with things which will not only rejuvenate their bodies, but their minds and souls. In many cases they are seeking the opportunity to discover themselves.

These are the things that are increasingly encouraging travel and as they develop they set trends and patterns of travel.

Extensive research has shown the trends that are likely to encourage people to want to travel to Kakadu in the future. In developing the image and experiences used to promote Kakadu it is important to be able to connect the experiences that Kakadu can uniquely provide with the types of people seeking them.

Our research and information from major markets has provided the basis for developing the image and positioning (brand) of Kakadu. It has also enabled the selection of the people most likely to be looking for the types of experiences Kakadu can uniquely or better provide than other places.

PART FOUR features further detail on developing a brand for Kakadu. For more information about consumer trends which will influence travel to places like Kakadu, refer to APPENDIX 1.

VISITATION TO KAKADU

From 1982 until the mid-nineties, visitation to Kakadu National Park grew five-fold, reaching its peak of approximately 240,000 in 1994. After that time, the number of visitors to the Park declined gradually, and in 2003 around 170,000 visitors – the same number as in 1987 – were recorded.

Holiday visitation to the Northern Territory reached its peak (1.8 million) in 1999/2000, whilst the Top End region peaked the following year at 488,000 – more than double the visitation to Kakadu. While a decline has been experienced at Territory and regional level since, there are early signs that this trend is reversing.

Parks Australia statistics for Kakadu show that 35% of visitors travel into the park with a tour operator. Approximately half the visitors are from overseas, 44% from interstate and 5% from the Northern Territory.

KAKADU SITUATION ANALYSIS

Strengths

- World's oldest living culture.
- World Heritage area (recognised for its natural and cultural values).
- Awesome physical beauty.
- Diversity and size of cultural and physical landscape.
- World's greatest 'Art Gallery', containing some of the world's oldest and most extensive rock art.
- Diversity of six seasons.
- Abundant and varied wildlife.
- Passion of Traditional Owners and other stakeholders.
- Dedication of joint Park Managers.
- Enthusiasm about tourism from the majority of Aboriginal people.
- Strong foundation for the development of unique tourism experiences.
- Strong name recognition.
- Kakadu offers people profound experiences.
- Professional, passionate tourism industry.
- Existence of successful Aboriginal enterprises in park.

Weaknesses

- Low knowledge of experience by potential visitors.
- Over emphasis of geographic icons.
- Under emphasis of culture.
- Lack of tourism management infrastructure.
- Negative local public image.
- Lack of strategic tourism planning and direction.
- Lack of strategic promotion.
- Lack of brand definition and understanding.
- Beliefs of a few Parks Australia staff and Traditional Owners that tourism is incompatible with other park management priorities.
- Perception of diminishing access to areas within the park.
- Lack of product / experience development.
- Limited Aboriginal involvement.
- Inadequate sense of arrival.
- Patchy information, interpretation and signage.
- Short tourism season as currently defined.
- Lack of understanding of Aboriginal culture / needs and wishes of Traditional Owners by some industry and visitors.
- Lack of communication or miscommunication between stakeholders.
- Quality of some tour operations is not appropriate.
- Limited numbers of Aboriginal people for future involvement in tourism.
- Uncertainty of tourism operations due to seasonal influences.
- Lack of security of tenure for operators in the park.
- Lack of tourism understanding/management skills.
- Lack of interest in Aboriginal culture by Australian tourists.
- Historical legacy of tension between Territory and Australian Governments.
- History of conflict and incompatibility relating to mining and its impacts on the environment and culture.
- Short land tenure remaining for Jabiru township (17 years remaining on head lease).

Opportunities

- To become one of the world's great visitor experiences.
- To provide greater diversity of tourism experiences and enterprises throughout the park.
- Trends in marketplace toward self discovery and spirituality.
- Trends toward seeking authentic and individual experiences.
- Alignment with the new Brand Australia campaign.
- International demand for experiencing Aboriginal culture.
- Increased domestic and international flights to Darwin.
- Increasing global interest in Aboriginal Art.
- Proximity to Arnhem Land, national parks and other areas of tourism significance in the Northern Territory.
- Sustained partnership between the Australian and Northern Territory Governments, Kakadu Board of Management and the tourism industry.
- Kakadu could become a role model for tourism in other national parks.
- Kakadu could become a role model for indigenous tourism in general.
- Kakadu could become a role model World Heritage area.
- Jabiru as a regional centre for tourism.

Threats

- Damage to natural environment through introduced flora and fauna. Resulting damage to the visitor experience.
- Global downturn in tourism due to external factors.
- Reduction in air services to, and reduced airline competition in the Top End.
- Insufficient resourcing to implement a shared vision.
- Increasing competition in cultural tourism throughout Asia Pacific.
- Misappropriation of indigenous culture.
- Misappropriation and devaluation of the Kakadu brand.
- Resistance to embracing the tourism vision due to concerns that tourism is given a higher priority at the expense of other park management requirements.
- Lack of capacity or depth in some of the tourism industry to deliver sustainable tourism product.
- Conflicting expectations from various stakeholders.
- Closure of current sites.
- Over emphasis on tourism may reduce effort or investment directed to protecting natural and cultural assets.
- Further mining activity.

KEY ISSUES

The following key tourism-related issues were identified during the consultations undertaken with Kakadu National Park's Traditional Owners and a wide range of stakeholders, as well as during the project's destination and experience audit.

1. BRAND KAKADU

In simple terms, 'brand' refers to the physical, emotional and spiritual elements which identify Kakadu in people's minds. For a more detailed explanation of brand, see PART FOUR.

Significant brand related issues include:

- there is a vagueness about what Kakadu is and offers to visitors;
- there is little understanding of what to experience in Kakadu;
- there is a low level promotion of Kakadu National Park;
- the way in which Kakadu is promoted is often misleading;
- there is insignificant promotion of the park in the key gateways of Darwin and Katherine;
- promotional focus is on geographic icons (for example Jim Jim and Twin Falls);
- the brand promise is under-delivered (for example waterfalls);
- Kakadu is recognised as a place of physical beauty, but little recognition is given to its rich Aboriginal culture and recent history;
- while there is a shared passion for Kakadu National Park within Australia, this passion lacks understanding and substance.

This all results in a brand which lacks direction, is confusing and in need of attention, focus and strategy. A brand strength which must be leveraged is the high recognition of the Kakadu name in Australia and selected international markets.

2. THE KAKADU EXPERIENCE

Lack of (iconic) experiences

Visitor experiences at Kakadu currently focus on 'activities' rather than 'experiences'. Most of the potential visitor perceptions of Kakadu relate to activities (such as swimming, the Yellow Water boat cruise, tours, etc), but little about the experience. In the early to mid '90s there was an image of Kakadu (Crocodile Dundee) and a perception of the experience (the authentic 'Crocodile Dundee' experience). Since then there has been neither.

A relevant case study: Fifteen years ago the only tourist experience outside the resort at Uluru was to climb the rock. However since then a range of new experiences has been developed. They include the award-winning Aboriginal-owned Anangu Tours, the Uluru Base Walk, walking tours of Kata Tjuta, the 'Sounds of Silence' dinner, day trips to nearby Cave Hill, camel rides and helicopter flights. These have

resulted in an enhanced visitor experience, social and economic benefit to Aboriginal communities, repeat visitation, and a de-emphasis on the importance of climbing Uluru. This same principle of product and experience diversity and development needs to apply to Kakadu.

Meeting Visitor Expectations

- Many people enter the park with a range of expectations drawn from various sources. A relatively low number of visitors (77%) were either satisfied or very satisfied with their Kakadu experience. Prior to and upon arrival in the park, there is insufficient, even misleading information outlining the range of experiences available to visitors.
- The expectation of swimming as a prime activity in Kakadu is a byproduct of outdated images, and the lack of promotion of other key attractions and experiences of the park.
- Many experiences rely on wildlife, seasonal variations and accessibility, and Traditional Owner availability, so it is not possible to guarantee continuous availability.

3. AUSTRALIAN GOVERNMENT AND NORTHERN TERRITORY GOVERNMENT SHARED RESPONSIBILITY

Responsibility for management and operation of Kakadu National Park has not been designed to accord the park its full potential. Although the park is a federally funded and managed national park, the fact that it lies within the borders of a Territory has created some diffusion of responsibility for promotion.

4. STAKEHOLDER COMMUNICATION

- There is a lack of formal and informal communication between stakeholders. There have been examples of misunderstanding in communication.
- The nature of current communications is problematic due to the absence of a communications strategy which includes all stakeholders on all aspects of the park.

5. STRUCTURAL COMPLEXITY

Kakadu National Park comprises a complex network of Aboriginal clans and communities, Aboriginal Associations and enterprises, governance organisations, Park Management, service providers, park based businesses, cultural organisations and action groups. It is difficult to navigate through this complexity.

The comment from one Traditional Owner, *“Kakadu is not a national park; it is a bureaucratic park”*, reflects the views of many. Park administration was established with the prime responsibility for park environmental management; however it is not appropriately equipped to handle increasing tourism issues.

The diverse and ever evolving nature of interests in the park highlights the need for a clear tourism vision, strategy and structure which has common ownership and engagement.

Public sector structure and processes in Kakadu may not be appropriate in all instances, and a degree of flexibility and new ways of operating are required.

6. TOURISM MANAGEMENT STRUCTURE

While Parks Australia has highly qualified and passionate people working on park management, conservation and relationships with Traditional Owners, the current Kakadu National Park administration and operations structure does not adequately provide for the development and promotion of tourism. There is a lack of expertise in and capacity for business development, partnerships, visitor experience development and promotion, communication with the tourism industry and service delivery. There also appears to be some resistance to change within the park.

Within this context it is acknowledged that significant resources have been devoted to providing visitor services and facilities in the park.

Frustration is evident amongst Traditional Owners and the tourism industry who both want to become more involved in and responsible for tourism management in Kakadu. There is also concern that Aboriginal people are often asked to contribute to policy development which is subsequently not delivered or partly delivered.

A better structure for management of the park should allow greater focus of park resources and skills on the priority of park management and protection, while at the same time allowing the better development of tourism and visitor servicing.

7. ABORIGINAL INVOLVEMENT IN TOURISM

There are a number of successful tourism enterprises in the park owned by and/or involving Aboriginal people. There is also evidence of a desire by many Bininj/Mungguy to share their culture. However, overall there has been a lack of involvement in tourism by Aboriginal people, and a lack of benefit from tourism for Aboriginal people. Bininj/Mungguy are asked to contribute to tourism through involvement in committees and other forums; however, there has been very little direct benefit to their communities.

Most Traditional Owners see tourism as important to keep culture strong, to provide economic independence for future generations and to ensure jobs for their children. However, the degree to which they want to be involved varies considerably.

The vision and enthusiasm for tourism expressed by Aboriginal people raises the issue of capacity in terms of the number of people who are available and their tourism skills.

Also of concern are external factors impeding involvement such as prohibitive insurance costs which present a major barrier for Bininj/Mungguy wanting to become independent tour guides.

In considering issues relating to Aboriginal involvement in tourism, significant successes and opportunities must be recognised:

- the development of the Seasonal Ranger Program;
- the introduction of the new development at Twin Falls, with Aboriginal cultural interpretation, has received very positive feedback;

- Kakadu Community Development is currently involved in projects aimed at encouraging and equipping Aboriginal involvement in tourism and upon which new initiatives could be built. These include:
 - the Kakadu Youth Employment Scheme;
 - partnerships for Indigenous Enterprise Development in Kakadu and western Arnhem Land;
 - establishment of student and trainee accommodation in Jabiru;
 - Kakadu Community Development CD ROM delivered in the Gundjehmi language;
 - regional partnerships between Kakadu and western Arnhem Land;
 - a new land management system for Jabiru. Transfer of assets from the (defunct) Kakadu Aboriginal Family Resource;
 - the establishment of a Kakadu Youth Centre;
 - Junior Bininj/Mungguy Ranger Camp.
- Charles Darwin University in association with the Gagudju Association as well as other organisations also have training programs operating in Kakadu.

8. INFORMATION AND INTERPRETATION

Several information and interpretation issues have been identified:

- there is limited availability of information prior to arrival in Kakadu, limiting the visitor experience, the opportunity for real park discovery and the opportunity for longer stays;
- the sense of arrival at Kakadu is less than inspiring and certainly less than informative;
- there is a lack of and/or inappropriateness of interpretation by some tour operators;
- there is insufficient Aboriginal involvement in interpretation, notwithstanding the Seasonal Ranger Program and some tour operations;
- Kakadu National Park does not make enough use of contemporary means of interpretation;
- independent visitors in particular have very little interpretive information provided;
- visitor interpretation facilities/products (including the Bowali Visitor Centre, Warradjan Cultural Centre and Seasonal Ranger Program), are not operated or cross promoted in an integrated manner. This is due to their physical distance apart, their distance from the main touring routes and their differing interpretation focuses;
- signage within the park is inconsistent. In many instances only place names are signposted rather than an indication of what can be found, for example, a scenic lookout.

9. TOUR OPERATOR AND GUIDE ACCREDITATION

A key issue identified by the park's Traditional Owners and tourism industry stakeholders is the lack of accreditation of tour operators, resulting in a variable quality of the experiences being offered.

Although industry training seminars are offered by Parks Australia, there is no mandatory requirement for participation as a qualification to operate in the park. This also leads to a variable quality of experiences offered to visitors, and less than effective communication of park values.

10. PERMITS / LEASES

Significant permit / lease related issues include:

- the current general permit duration of 12 months is inadequate to facilitate investment in plant infrastructure and skills development;
- permits for standard land-based tours are issued freely, without any link to the quality of tour product / interpretation, or understanding of and commitment to Aboriginal culture and the environment. Detailed assessment is carried out for special permits for limited tours;
- there are 180 operators listed as permit holders by Parks Australia, of which approximately 100 were active in July 2004;
- there is poor quality control of permit holders, apparently due to lack of resources rather than lack of diligence;
- one permit fee applies to all operators regardless of size or business undertaken in Kakadu.

These issues will become increasingly important as the Kakadu brand develops.

11. ENTRANCE FEES

Three key issues regarding entrance fees were identified:

- there is a diverse range of opinions on fees ranging from abolition to increasing the fee and introducing additional charges on activities such as Yellow Water cruises or fishing;
- with one exception, Northern Territory Parks do not charge entry fees, unusual for Australia where fees are the norm. Although a Kakadu annual pass is available, local residents see inconsistency in having to pay to visit Kakadu, but not Territory-managed parks. The fee is not an issue for interstate or international visitors, except in direct correlation to the perceived value of the experience;
- there is a relatively low start up cost of entry for tour operators.

12. LOCAL NEGATIVITY

There is a widely held negative view of Kakadu National Park within the Northern Territory and specifically the Darwin community, caused by a series of factors including negative press, lack of communication, negative experience and historical political controversy. This has resulted in a syndrome widely labelled as 'Kakadon't', which has become the local catch cry.

Specifically, it has been reported that only 20% of Darwin residents have visited Kakadu National Park. These residents make up less than 5% of total visitation.

13. TOURISM ARRIVALS TO THE TOP END

The downturn in inbound tourism has been exacerbated in Darwin and across the Top End due to a reduction in international flights. In addition, the region faced a reduction in domestic flights following the Ansett collapse. The 2004 tourism season appears to have shown a significant turnaround in visitor numbers to the Top End.

Over recent years there has been a correlation between arrivals to the Top End and visitation to Kakadu, suggesting that declining park visitor numbers have been affected by external factors.

14. ACCESS TO / WITHIN THE PARK

Several access related issues have been identified:

- accessibility has reportedly decreased. Anecdotally it was reported that the number of areas closed is greater than the number remaining open. While this is incorrect, it raises important communications issues;
- some areas are closed to tour operators that self-drive tourists can access;
- as areas close, there is reportedly increased pressure on remaining areas;
- seasonal limitations on access to various key locations prevent current expectations being met;
- tour operators are concerned that they are now given permits that specify which areas they can visit, rather than in the past when they were given permits that specified which areas they could not visit. They believe this has resulted in fewer available location options; in fact the new system has not changed the areas available to visit, but allows better monitoring of visitor impact. This has not been well communicated;
- Traditional Owners have expressed the desire to retain areas of the park for their own use for hunting, fishing and ceremony;
- there are also many sacred sites and stories which the Aboriginal people need to protect and keep private. This must be respected. In a tourism sense this can add to the authenticity and mystique of the Aboriginal culture, rather than detract from it;
- tourism has tended to focus on the central and eastern part of the park where the major tourism icons are located. There is also significant potential in the southern and northwestern parts of the park. Development of tourism in these areas would assist in easing pressure on the central part as well as spreading economic benefit to communities throughout the park;
- the bushwalking and amateur fishing communities in Darwin have expressed concerns about access to areas of the park.

15. SEASONALITY

Issues relating to seasonality include:

- Kakadu National Park is promoted and perceived as a dry season destination (and yet 'wet season' images of waterfalls proliferate). This often results in visitor expectations not being met;
- existing businesses find it difficult to achieve adequate returns on investment with such a short season, and as a result there is a lack of willingness to invest in refurbishment and infrastructure;
- there are Traditional Owners who hold strong views that the wet season provides the time for country to rest;
- Kakadu experiences climate variability (that is, different start and end dates for the dry season) which affects planning for roadworks, crocodile surveys, etc.

16. PARKS AUSTRALIA RESOURCES

There are concerns that tourism related responsibilities of Parks Australia staff are being developed at the cost of the principal environment management function.

17. LOOKING AT KAKADU IN ISOLATION

An island mentality has developed around Kakadu National Park because of its unique position as a federally managed and funded national park within Territory boundaries. Kakadu is not seen or promoted in context of other national parks in the Northern Territory or in context of the broader tourism opportunities. Nor is it seen in the context of its proximity to Arnhem Land which has significant tourism potential, for example Injalak (Oenpelli).

18. WORLD HERITAGE RECOGNITION

There is a lack of recognition of the significance of Kakadu's World Heritage listing and leverage of it via promotion. There is also a variance of views about the World Heritage status amongst some Traditional Owners. Some see it as a badge of honour, others as an irrelevant imposition to their country by outside interests.

19. SAFETY

The Traditional Owners have a strong belief that they have a responsibility for the safety of visitors to the park. This is because the park is their home, and under Aboriginal custom they carry responsibility for the welfare of any visitor to their home. Therefore, when an accident occurs in the park, extreme distress is caused to the Traditional Owners. This sometimes results in requests for closure of, or restricted access to, areas where accidents have occurred. This is not understood adequately by the industry or the wider community.

20. UNRESOLVED LAND CLAIMS

Unresolved land claims create problems for park management and tourism investment.

21. SECURITY OF TENURE

The headlease of Jabiru Township has reportedly only 17 years remaining, providing limited future tenure for existing residents and operators, and making it difficult for potential investors to establish in the town.

BUILDING THE VISION

The vision for tourism addresses five key areas of need:

PROTECTION

- Protect and preserve the park for future generations;
- Protect sacred sites;
- Protect the park from overdevelopment;
- Protect the park from the potential harmful impacts of tourism.

RESPECT

- Respect the wishes of the many Aboriginal people who live in Kakadu to safeguard their culture, lifestyle and privacy.
- Respect that authenticity and storytelling are integral to Aboriginal culture and should be included in visitor programs which interpret Aboriginal stories of the park.
- Respect that the true essence of Kakadu's image is both the beauty of the land and the spiritual Aboriginal culture.

INVOLVEMENT

- Bininj/Mungguy have expressed a strong desire to become involved in tourism and to move forward – but not too quickly. Tourism is seen as a way of sharing and protecting culture and providing economic benefit and employment for current and future generations.
- Involvement will vary from clan to clan. Some seek full ownership of tourism businesses, others partnerships with non-indigenous operations, others want programs which require minimal input and some do not want to be involved in tourism at all.
- Involve the tourism industry in tourism management, visitor services and creation of new visitor experiences – the park needs their participation in these areas.

MANAGEMENT

- A strong tourism development arm of Kakadu National Park is needed to work closely with the park management, the tourism industry and the Traditional Owners.
- The quality of tourism businesses operating within the park needs to be better managed through accreditation programs.
- Tourism operators need longer contracts with the park so they have the time and security to develop their investment.
- New visitor experiences need to be developed and existing ones enhanced.
- The level of park red-tape needs to be reduced.
- The park needs tourism programs which focus on smaller groups who will pay more for a quality experience. These programs should encourage visitors to stay longer within the park and do more - but in a controlled way so that no damage occurs. Kakadu is not a place for mass tourism.

PROMOTION

- Kakadu is known for its natural beauty, but Aboriginal culture and spirituality, and its status as a World Heritage Area, should become a stronger part of its image.
- Promotion needs to better reflect the available visitor experience.
- The support of the people of Darwin is vital for the park's future. Better understanding and pride in the park needs to be created through promotional and information campaigns.

THE VISION

Kakadu National Park is one of the great World Heritage Parks, recognised universally as a place with...

- a living Aboriginal culture – home to Bininj/Mungguy;
- extraordinary natural landscapes and a rich variety of plants and animals;
- enriching and memorable experiences for visitors;
- a strong and successful partnership between Traditional Owners, governments and the tourism industry, providing world's best practice in caring for country and sustainable tourism.

The journey to achieve this vision for Kakadu National Park will be strengthened if it moves at a pace which allows for continual involvement, frequent consultation and flexibility. This is the wish of the Traditional Owners and makes sense for the development of tourism in Kakadu.

PART THREE



MAKING IT HAPPEN

*"Aboriginal people should start
slowly walking to the future,
now..."*

Jacob Nayinggul

RECOMMENDATIONS

There is universal passion from Traditional Owners and stakeholders alike for Kakadu National Park. It is a much loved, yet misunderstood place for many. Indeed, this passion extends to a strong desire by most to see Kakadu develop a viable tourism industry.

During the consultation undertaken to identify the shared tourism vision, common themes emerged which have moulded the vision and recommendations that will bring it to fruition. Significantly, the views of Bininj/Mungguy, tour operators and other stakeholders were remarkably consistent.

There is widespread support for tourism in Kakadu National Park to move forward on the strong foundation of extraordinary landscape and spiritual culture, with a greater emphasis on the park's rich Aboriginal culture. There is a need for greater recognition that Kakadu is home to Bininj/Mungguy, and tourism needs to be balanced with their needs and wishes to protect their lifestyle and privacy.

The need to protect and preserve the park for future generations is undoubtedly the most important priority of all. The protection of its wildlife and ecosystems, protection of sacred and historic sites including more recent history, protection from overdevelopment and even protection from adverse tourism and other impacts are central to this. Volume or mass tourism should be avoided, and emphasis should be placed on low impact, high yield, longer stay tourism. New funding and investment for tourism infrastructure, development and capacity building will be necessary to ensure that resources are not drained from conservation activities. With sensitive consultation and management, there is room for wider exploration of Kakadu's undiscovered diversity of landscapes, flora and fauna.

Bininj/Mungguy have expressed a strong desire not to move forward too quickly, but rather in a planned, considered way. Traditional Owners see tourism as a way of sharing and preserving culture and providing economic benefit and employment for current and future generations. The level of desired involvement varies from clan to clan and encompasses everything from full ownership of tourism businesses, to partnerships with non-indigenous operators, to low level involvement or none at all. It is crucial that this is recognised and respected. With some notable exceptions, Traditional Owners currently have limited understanding of the tourism industry, how it works, and how social and economic benefit can be gained. Providing opportunities for skills transfer is vital to achieving the vision.

Likewise there is a need to develop capacity to present Aboriginal culture and spirituality of the park. Authenticity and storytelling are integral to Aboriginal culture and should be used as a core asset in developing visitor experiences, interpretation and information. There is also a recognised need to provide new experiences outside the core dry season; these new experiences should reflect the unique six seasons of Kakadu.

A common view within the tourism industry is the need for greater involvement of private enterprise in tourism management, visitor services and provision of experiences in Kakadu.

The sporadic and often misrepresented promotion of Kakadu National Park, which has led to visitor dissatisfaction, needs to be reviewed. Similarly, there is a need to increase awareness and understanding of the park by Darwin residents to address the broad disconnection between locals and the park.

Traditional Owners and the tourism industry believe that there is a need to review tourism management in the park. This review should include structure, permits and accreditation. Introducing a tourism development arm of Kakadu National Park will ensure tourism can work closely and in sympathy with the park's prime purpose of protection and preservation.

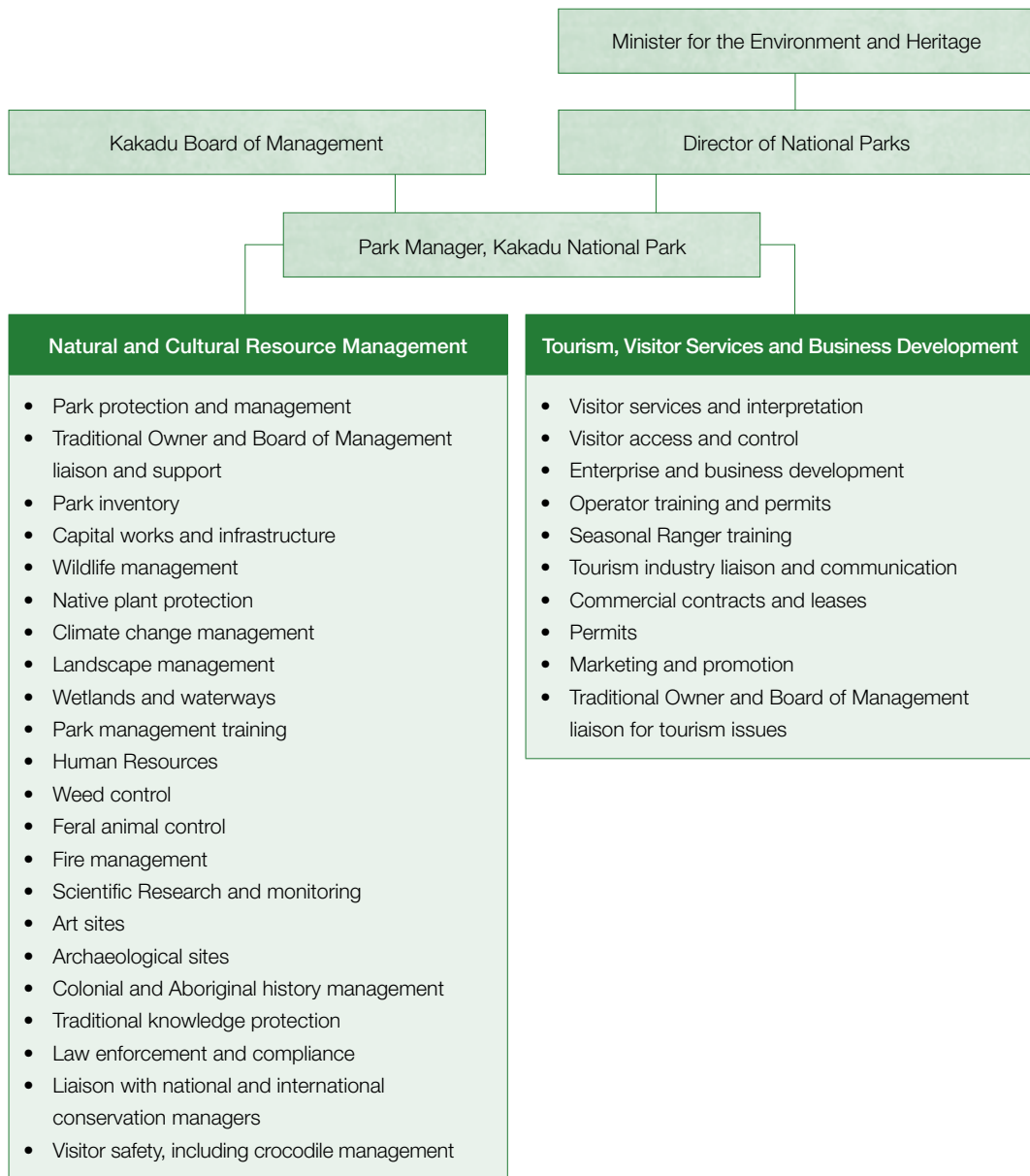
This reports presents two key recommendations that will achieve the shared tourism vision for Kakadu. It also presents 71 subsequent ideas to 'make it happen'. The recommendations are:

- 1. The Traditional Owners, the Australian and Northern Territory Governments, the Kakadu Board of Management and industry stakeholders agree to the shared vision.**
- 2. All stakeholders work together to make it happen through considering and adopting the following ideas as the second stage.**

A NEW STRUCTURE TO ALLOW INCREASED FOCUS ON PARK MANAGEMENT AND TOURISM DEVELOPMENT AND FACILITATION

1. Change the structure of Kakadu National Park administration to allow greater focus on both park management and tourism management. Introduce a separate section which oversees and facilitates the development of tourism operations and visitor services. This will ensure Parks staff are not diverted to look after tourism activities in which they have little experience, at the cost of land management priorities.

Following is a suggested structure better suited to the management of tourism in Kakadu.



The Tourism section should be staffed by tourism professionals with appropriate skills. Although administered separately, the park and tourism management sections are inextricably linked, and will need to cooperate and integrate.

It is acknowledged that Parks Australia and NTTC have already commenced plans to employ tourism coordinators. This is a positive step and the appointments should be considered in the context of this recommendation.

Upon its establishment, the tourism division should review the many existing reports and recommendations relating to visitor services and recreation development within the park (for example the Management Plan, the Cultural Heritage Strategy, Bushwalking Strategies, etc) as well as relevant external reports (from Tourism Australia, Tourism Task Force, etc).

- 2.** Embrace a commercial tourism focus as a means of providing improved visitor services, greater Traditional Owner involvement and better financial returns to the park, its Aboriginal communities and the travel industry.
- 3.** Recognise tourism as a core asset of the park, undertaking a change management program within park management to create an understanding of the economic importance of tourism and the need to generate revenue to help sustain the park.
- 4.** Encourage and facilitate increased involvement of Traditional Owners in visitor services enterprise development.
- 5.** As an extension to Parks Australia's responsibility for generating involvement in the operation of the park by Bininj/Mungguy (exemplified through the employment and training of Aboriginal Rangers), establish a 'one stop' Resource Centre to assist Aboriginal communities to:
 - develop a greater understanding of tourism and its benefits;
 - gain appropriate business skills;
 - receive relevant advice and support;
 - access commercial partnership and sources of finance.

This Resource Centre could be incorporated into the mooted Kakadu Development Centre concept being developed through the Jabiru Regional Sustainability Project.

- 6.** Actively encourage local Aboriginal enterprise development in micro-businesses that allow people to slowly build skills and confidence for frontline tourism.
- 7.** As a part of its business development support process, develop a mentoring program to allow appropriate transfer of knowledge and skills. (This could link with the Australian Government sponsored Indigenous Mentoring Program). Alongside this, conduct a 'Train the Trainer' program to support the transferring of skills and leadership development opportunities for young Aboriginal people.
- 8.** As a companion document to the *Management Plan*, develop a Tourism Masterplan. To be overseen by the Board of Management in consultation with Traditional Owners, the tourism industry and other stakeholders, this Masterplan should detail and guide planning for:
 - how tourism can support management of the park;
 - how tourism can meet the aspirations of the Traditional Owners;

- future access and facility development;
- future experience development and enhancement;
- identification of commercial opportunities;
- protection of the park from tourism pressures and adverse impacts.

This Masterplan should not hold up delivery of the Management Plan, but should be a living document developed over the next two years, allowing for flexibility as circumstances change.

9. Further to the strong expression of interest towards involvement in tourism by younger members of the Aboriginal community, develop special programs to assist their entry into tourism related activities. (This is covered in more detail under the 'Increased Aboriginal Involvement' recommendations).
10. Develop a specific Aboriginal employment strategy to encourage greater indigenous employment in the park and remove current bureaucratic impediments. This strategy should include specific outcomes, for example, numbers of people, areas of employment and training, etc.
11. Direct the development of tourism to and within the park towards the creation of quality experiences, and the achievement of higher yield and improved economic and social returns for stakeholders, rather than volume for volume's sake. The development of high yield, low impact tourism would provide economic benefit to Bininj/Mungguy as well as minimise impacts on privacy. The higher yield objective should not disadvantage families and low income earners wanting to enjoy Kakadu.
12. In the medium to longer term, develop visitor servicing, park interpretation and guiding within the park on a private enterprise / franchised basis.
13. Provide training and skill development for Board of Management representatives to facilitate good corporate governance and business management in line with contemporary practices.
14. Develop a communications strategy as a priority to keep the Traditional Owners, tourism industry, media and wider public informed of plans, issues and developments with the park on an ongoing basis.
15. Develop a Memorandum of Understanding between Parks Australia, Northern Territory Tourist Commission, Charles Darwin University and other relevant institutions to undertake future research specific to Kakadu National Park and its visitors.

BRAND DEVELOPMENT AND PROMOTION

For an explanation of brand, refer to PART FOUR: BRANDING AND PROMOTION (page 32).

16. Develop and promote a strong and consistent brand for Kakadu in order to refocus the perception and image of the park.
17. As the current logo is generically vague and could be representative of any natural area in the world, develop a new identity/logo which adequately reflects Kakadu's brand, its values and attributes, and is more in keeping with the significance and interrelationship of the land, seasons and indigenous culture. Invite local Aboriginal artists to design this identity/logo, using a culturally appropriate icon image from Kakadu's rock art. This should appear on all park promotional material, signage and rangers uniforms, etc. It will be the symbol which instantly identifies Kakadu National Park. (This should be registered as a trademark).

18. In association with the development of the brand, develop a 'Brand Manual' detailing supporting attributes, values and images. This manual should provide specific guidelines on how the Kakadu brand can be portrayed in advertising and promotional material. Other parties can be licensed to use the brand, providing they adhere to these guidelines. As a part of permit obligations, tour operators must comply with these guidelines in the production of promotional material relating to the park.
19. Leverage commercial opportunities to develop merchandise which carries the Kakadu brand identity. For example, establish a small cottage industry within the Jabiru Youth Centre to print T-shirts carrying the image of Kakadu. (This would create a sense of ownership, achievement, and provide financial benefit to the Youth Centre).
20. Develop an advertising and promotion campaign to relaunch Kakadu National Park both in Australia and internationally. To be cooperatively coordinated and funded by Parks Australia, the Northern Territory Tourist Commission, Tourism Top End and Tourism Australia.
21. The above agencies to work closely on an ongoing basis to developing effective cooperative promotional campaigns.
22. As a part of the promotional and marketing activities of Kakadu National Park, Parks Australia, the Northern Territory Tourist Commission and Tourism Top End to:
 - review image libraries to ensure they are consistent with the brand values and present realisable expectations;
 - make these images available to stakeholders and tour operators for use in supporting promotional and collateral material;
 - develop photography guidelines which are consistent with Traditional Owners' values and prevent misappropriation of cultural images.
23. Develop a brand checklist for the park to ensure that all Kakadu visitor experiences, including arrival to and activities in the park reflect brand values. This should include (but not be limited to) a review of the park entrances which must provide a greater sense of arrival and statement of park values. The Aboriginal flag should be flown in the park wherever possible.
24. Whilst providing designated areas for swimming that are both safe (from crocodile inhabitation or other factors) and which do not impinge on cultural considerations, ensure these activities are not promoted as prime attractions of the Kakadu National Park experience.

INCREASED ABORIGINAL INVOLVEMENT

Aboriginal involvement in tourism is seen as central and fundamental to the delivery of the vision and is addressed in many recommendations throughout this report. The following seven specifically relate to facilitating and resourcing involvement.

25. Ensure a flexible approach to future Aboriginal involvement in tourism, and facilitate involvement for different levels of engagement, ranging from Bininj/Mungguy owning and managing businesses, to participating in joint ventures with non-Aboriginal organisations, to operating in visitor service delivery through ranger programs, to low level engagement with occasional visitor contact.

26. Improve communication amongst tourism stakeholders to ensure widespread recognition and acceptance of the Bininj/Mungguy need to achieve a balance between providing tourism experiences and maintaining a quality lifestyle. This balance enables Aboriginal people to undertake activities such as hunting, fishing and ceremony without outside intrusion whilst at the same time participating in tourism development if they wish.
27. Via the Resource Centre (see recommendation 5), build on existing programs such as the Stepping Stones Tourism Workshops to provide improved opportunities for Traditional Owners to better understand tourism, the benefits it provides and the adverse impacts to be avoided.
28. Provide opportunities for Bininj/Mungguy wishing to become involved in tourism to experience other indigenous tourism product and operations, meet with other indigenous operators, and attend events such as the Indigenous Tourism Conference.
29. Introduce 'Understanding Tourism' as a part of the curriculum of schools within Kakadu National Park.
30. Work with the Jabiru Youth Centre to build on / develop tourism learning and participation programs - for example, the Junior Ranger Program, independent guiding, authentic arts and crafts or merchandise production, bush tucker tours.
31. Where possible, communicate all tourism education programs in local Aboriginal languages via DVD, CD ROM, audiotapes and checklists rather than lengthy written reports.
32. Interested Traditional Owners to explore participation in Kakadu tourism by the Aboriginal residents of Western Arnhem Land given their strong kinship, in order to alleviate the potential future pressure on a relatively small number of Bininj/Mungguy.
33. Government to support the resolution of outstanding land claims as a matter of priority.

INFORMATION AND INTERPRETATION

34. Develop a comprehensive visitor information and interpretation strategy for Kakadu to enhance the visitor experience. Base this strategy on storytelling - a major part of Aboriginal life – to ensure visitors have a greater and more accurate understanding of the significance and the experiences available in the park. Use a wide range of media to tell the story from the Dreamtime and ancient aboriginal history, through thousands of years of traditional culture to the more recent colonial history and Kakadu of today. Possible media includes 'Radio Kakadu', audiotapes, CDs, DVDs, web sites, brochure boxes, signage, and personal interaction. These should include the opportunity for Bininj/Mungguy enterprise in and ownership of production and presentation.
35. Undertake a signage review to identify current and potential directional and interpretive signage. In addition to place names, ensure all signs indicate what features / facilities are sited at each location.
36. Through interpretation, encourage visitors to have a greater sensory experience through listening to as well as looking at landscapes such as Ubirr Rock.
37. Undertake information promotion and distribution in central locations in Darwin, Katherine and Alice Springs to ensure visitors have comprehensive information about the park and its experiences prior to arrival. These centres should provide branded information which motivates people to visit Kakadu, engage in its wide range of experiences and stay for an extended period.

38. Introduce a condition of accreditation for tour operator permits, which requires their guides to annually attend PAN's Tourism Information Seminars. This ensures accuracy and consistency of Kakadu National Park interpretation. Given the transitory nature of the tourism workforce, consider flexible delivery of this training as currently being developed by Charles Darwin University. For example, provide an online component without precluding the necessity for tour operators to spend time in the park.
39. Introduce a permit condition for non-accredited interstate coach tour operators, requiring them to take on an approved local guide to deliver information and interpretation to passengers whilst in the park. Recognising the difficulty in achieving this in the short term, make provision for all interstate coach companies to access appropriate information to enable them to give appropriate interpretation to visitors.
40. Undertake cross cultural training to fulfil obligations under the Fourth Management Plan and to facilitate improved interpretation for visitors by park staff when Traditional Owners are not available. Cross cultural training should also be an integral part of Parks Australia's tourism industry seminars. (The newly formed Ngarrban.garrebukkan Cross-Cultural Collective could play a key role in tourism interpretation/accreditation in the short-term and develop skills for cultural tourism and business management in the long-term).
41. Establish an additional cultural centre in the southern end of the Park, possibly at Old Goodparla. This location would offer the prospect of combining the colonial buffalo history of the homestead with bush tucker, weaving and story experiences.

DEVELOPMENT OF EXPERIENCES

42. Focus destination development on visitor *experiences* rather than *attractions*. (See page 34 for an explanation of the difference between an activity and an experience). This responds to a shift in market demand towards more learning and engaging experiences, rather than just visiting places. These experiences should reflect Kakadu's brand attributes and values, such as its culture, diversity and spirituality. This should involve both refreshment of existing experiences and development of new experiences.
43. Cooperatively develop a range of Kakadu experiences which meet market demand and attract new and profitable market niches. Potential new products/experiences include:
 - night wildlife tours;
 - evening dining with Aboriginal storytelling of the night sky;
 - school camps / education programs providing opportunities for interaction between visiting children and willing young Bininj/Mungguy;
 - new and extended walking tracks with overnight cabin accommodation. (There is potential to develop an iconic 3-4 day walk similar to New Zealand's Milford Track);
 - culture camps (demonstration of traditional art/craft and interactive sharing of culture);
 - enhanced wildlife and landscape tours presented through 'Aboriginal eyes';
 - bird watching tours;
 - luxury, low impact eco-camps;
 - bush tucker tours;
 - small tourism centre at Twin Falls where Aboriginal people could guide visitors on walking, hunting or fishing tours.

44. Establish a Foundation along the lines of the Mutitjulu Foundation at Uluru, where all visitors are asked to contribute a nominal amount (for example \$2). This Foundation could facilitate school camps or other worthy projects.
45. Incorporate indigenous culture and adopt the custom of Aboriginal storytelling when developing and presenting Kakadu's interpretive experiences.
46. Seek expert advice in developing experiences and associated interpretation. (One source might be Prof Sam Ham of the University of Idaho who has worked extensively with the native American Indians and in national parks).
47. Develop and promote Kakadu's more unique and popular experiences as signature or *iconic experiences*, for example, a four day bush walk, Rock Art Galleries, Lightning Man Tours or Yellow Water cruises. These will symbolise Kakadu, improve visitor perceptions of its offerings, and help to deemphasise the focus on landscape and icons (such as Twin Falls) which cannot meet expectations year round.
48. Develop a range of accommodation for different market segments and budgets as an integral part of improving the Kakadu experience, and improving both length of stay and visitor yield. Consider luxury camps, eco camps, school accommodation, small lodge accommodation, family mid-range accommodation, extension of existing camp sites, development of quiet relaxation sites and the like. They should be low impact, involve Traditional Owners and provide benefit to their communities.
49. Develop an annual or biennial cultural festival to promote cultural exchange and mutual understanding amongst Aboriginal people and non-Aboriginal people. In addition to the significant cultural and social benefits, the festival could provide a valuable source of income for the local Aboriginal people. (Consider the highly successful Garma festival held annually by the Yolgnu people in Arnhem Land as a model). We understand that a festival for Jabiru is currently under development and should be encouraged.
50. The tourism industry to adopt a flexible approach to Kakadu tourism and develop alternative tour experiences for occasions when particular activities are unavailable.
51. As part of the Tourism Masterplan, undertake studies and develop management strategies for significant recreational park activities such as fishing and bushwalking.

SEASONAL OPPORTUNITIES AND ACCESS

52. Extend seasonal visitation to Kakadu by generating new experiences which attract different people at different times of the year. The six seasons unique to Kakadu, and so much a part of the local culture, can be turned into a unique selling point. Matching different experiences to different seasons would provide a significant platform for promotion of the park to different market segments. This should be done gradually on a small scale basis with initial emphasis on the shoulder seasons either side of the dry season. (For example the spectacular lightning tours combined with the legend of the Namarrgon the Lightning Man or wet season boat tours). Apart from attracting new markets and providing new visitor experiences, an extension of seasonal visitation would also provide greater viability for tourism operators within the park. This concept must be developed with consultation with the Traditional Owners and respect for their views on resting the country.
53. Consider opportunities for better access to areas of the park during the wet season and investigate what infrastructure needs to be provided.

54. In consultation with Traditional Owners, investigate opportunities for opening up new areas suitable for tourism operations, such as in the South Alligator area.
55. Review access to visitor experiences for elderly and incapacitated visitors.

TOUR OPERATIONS

56. Extend tour operator permits to a minimum period of five years (or longer on a rolling basis), subject to satisfactory performance standards. This would encourage tour operators to become accredited, increase investment in and development of their tours. (This would be in line with practices being adopted by other protected areas such as the Great Barrier Reef Marine Park).
57. Introduce a tour operator accreditation and associated tour guide certification system as a part of the requirement for permit issue, to ensure an appropriate standard of tour operation and representation of the park's values. This should be based on the new national accreditation system being developed by the National Tourism Accreditation Working Group. This will incorporate programs such as Ecotourism Australia's EcoCertification and the Respecting Our Culture Accreditation Program of Aboriginal Tourism Australia.
58. Provide incentives for Tour Operators to complete the accreditation program, and their staff to undertake certification. For example access to particular areas depending on level of accreditation.
59. Introduce permit conditions which rule that permits remaining inactive for 12 months automatically lapse.
60. In the development of an accreditation and permit program, work with the Northern Territory Parks and Wildlife Commission to achieve common conditions and standards in all parks in the Northern Territory.
61. Introduce different permit requirements for the development of exclusive or limited access tours and experiences. Special permits should attract a higher than standard fee, and exclusive permits should be priced at a premium. Where appropriate, payment of a nominated proportion of this additional fee should go directly to the relevant Traditional Owner.
62. Where there is a clear desire on the part of Traditional Owners, encourage tour operators to enter joint venture partnerships or employ Bininj/Mungguy in the development and guiding of tours and experiences.
63. Require all tourism operators to provide an environmental management plan for all tourism activities. The plan detail should not be bureaucratic in nature and should relate to the size and potential impact of operation.

THE FUTURE OF JABIRU

64. Develop Jabiru as a tourism centre to ensure its ongoing viability after the mine has closed. Included in its increased tourism role could be:
 - an arts and cultural centre;
 - a tourism school / college (recognising Charles Darwin University's current role in providing training opportunities);
 - a base for the development of day or night tours;
 - a hub for wider travel in the region.

LOCAL AWARENESS AND SUPPORT

- 65.** Undertake a public awareness campaign in the Northern Territory, to address the negative sentiment towards the park (as characterised by the term 'Kakadon't'). Design this to foster a sense of ownership and pride in Kakadu by the residents of Darwin and Katherine, and to encourage their visitation. A promotional campaign could include a free pass with motor vehicle registration notice, free entry for residents bringing visitors to the park, or introduction of a 'Friends of Kakadu' program.

The challenge of turning public opinion around should not be underestimated and it could well take considerable time. It is however an essential process in not only achieving a long term vision for Kakadu, but in the future prosperity of Darwin which is inextricably linked to the park as a major tourist attraction to the region.

RESPONSIBILITY FOR IMPLEMENTATION

- 66.** Responsibility for implementing the recommendations in this report should be vested in the Kakadu Board of Management with the strong support of both Australian and Territory Governments. A priority list of actions needs to be developed as a first step.
- 67.** In order to add support and weight to the implementation of this vision, the Australian and Northern Territory Governments to develop a clear and joint statement committing to the future of tourism in Kakadu National Park.
- 68.** Encourage the Australian and Northern Territory Governments to give priority to initiatives which support both community development and tourism, particularly where the initiatives involve streamlining of processes and policy.
- 69.** The ideas proposed to achieve the shared tourism vision will need to be implemented over time, with the agreement of Traditional Owners and in consultation with the tourism industry and other stakeholders.
- 70.** As the recommendations have significant cost implications, investigate how costs can spread over a number of years and opportunities for financial realignment with existing programs.
- 71.** Stakeholders to cooperatively undertake an annual review of the tourism vision in Kakadu National Park to assess progress to date and future opportunities.

The development of this tourism vision for Kakadu has in itself led to an increased level of expectation and hope with Bininj/Mungguy and stakeholders. This expectation is tinged with a cynicism born of previous experience where promises have been made and not delivered. It is fundamental to the future of the Aboriginal people and all stakeholders in Kakadu National Park for the Northern Territory and Australian Governments to make a commitment to the future which provides an opportunity for new partnerships, new successes and a new beginning for Kakadu National Park.

PART FOUR

BRANDING AND PROMOTION

"The strange, as it were, invisible beauty of Australia, which is undeniably there but which seems to lurk just beyond the range of our white vision..."

D H Lawrence, Kangaroo

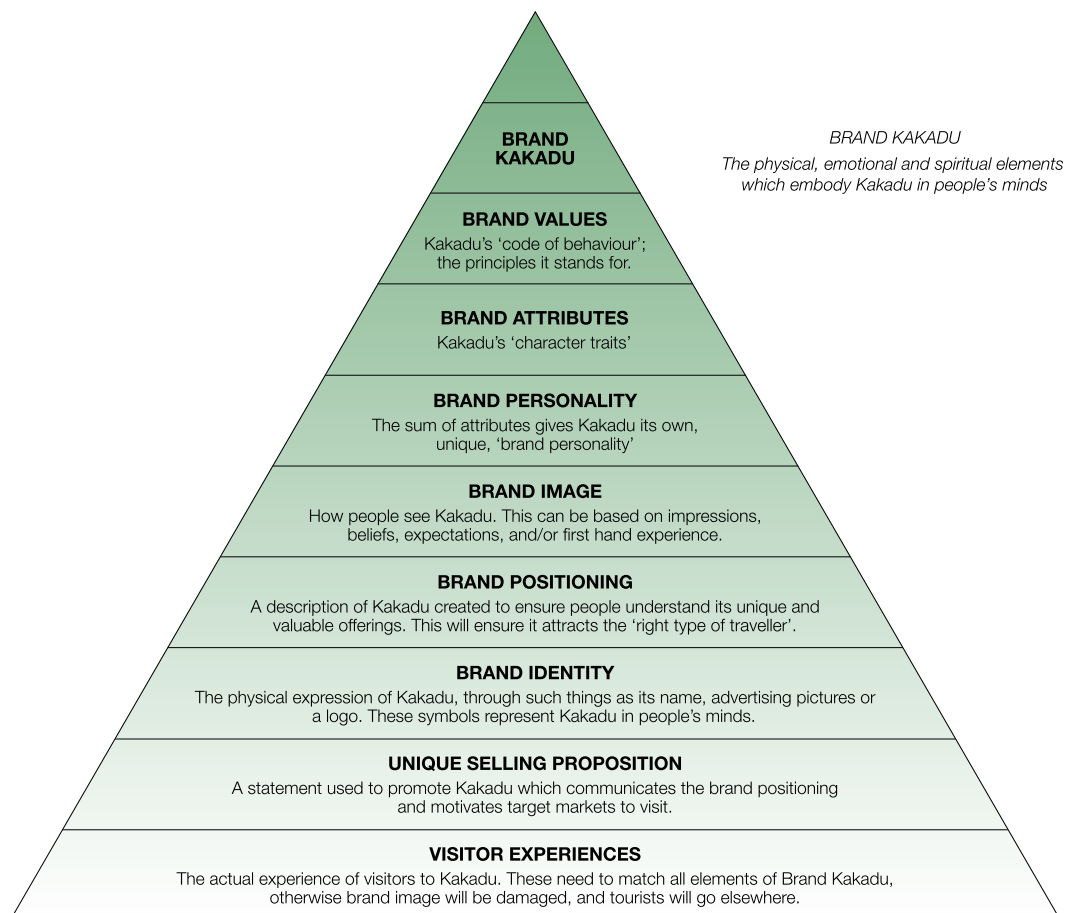
BRAND KAKADU

WHAT IS BRAND?

Brand refers to the feelings, perceptions and values (both tangible and intangible) held by customers about a product. A destination's brand image reflects the affinity and connection visitors or potential visitors have with the place, its values, attributes and 'personality'. This is what sets a destination apart from its competitors.

A brand is not just a logo, advertising tag line or advertising campaign; they are merely outward representations or symbols of a brand. They can be likened to someone's face, voice or signature which identify them. They may represent, but don't define a person's values, character traits and personality.

The following diagram explains the various elements of brand in relation to Kakadu.



THE IMPORTANCE OF BRAND

"In the past people travelled to discover new places and things, today, increasingly, they are travelling to places and doing things to discover themselves".

With major changes in the reasons why people travel and the benefits they seek from travel, the development of 'brand' for destinations has become increasingly important. People need a reason or a rationale to travel, and to travel to one destination over another. Brand image will guide this decision making process.

Without a strong and credible brand, a destination may face a number of outcomes:

- there will be little or no differentiation from other destinations;
- there will be poor consumer understanding of the destination's unique experiences;
- potential visitors will develop their own perceptions of the destination or brand;
- without a perceived value to the customer, the destination will need to compete on price or price will become an issue;
- the destination or product will become a commodity;
- competitors with a stronger and more positive brand will win business.

These represent the symptoms Kakadu has suffered in recent years.

A product without a brand image is like a person without a personality. They meld into the background, they don't stand out in a crowd, they become part of the mob.

There are three important factors to consider in developing a successful destination brand.

1. It must uncover and explain the destination's uniqueness.
2. The visitors attracted by the marketing must be of a type sensitive to the social, cultural and environmental values of the place and its people.
3. It must relate to tourism market needs (especially those that are increasing in importance as the motivation for travel for many people is changing).

APPENDIX 1 features more details about these considerations.

DEVELOPING THE KAKADU BRAND

In an increasingly competitive marketplace, a strong brand which sells the unique characteristics of Kakadu National Park is needed to underpin all marketing and promotional material. This will help strengthen the emotional appeal of Kakadu, differentiate it from other places and attract the most suitable visitors to the Park.

The experiences delivered to visitors in the Park must underpin this brand. A brand makes a promise. Experiences deliver on the promise. When marketing Kakadu, these experiences need to be connected to positive market trends and matched to the people seeking them.

The difference between an experience and an activity

An *activity* is generally physical in nature. There is little engagement with or understanding of the surrounding area, its values or significance. Activities include swimming, sightseeing, etc. An *experience* is more than a physical activity. It includes mental or spiritual aspects. There is generally a higher level of engagement with or understanding of the surrounding area and its relative significance.

DEVELOPING BRAND KAKADU	
Brand Values	
<ul style="list-style-type: none"> • Enlightening • Engaging • Friendship • Sharing of culture • Mutual respect 	<ul style="list-style-type: none"> • Non judgmental • Spirituality - connection with country • Life changing • Unique and authentic • Awesome and inspirational ... sensory
Brand Attributes	
<ul style="list-style-type: none"> • Multi faceted / multi levels • Many personalities • Multi-dimensional • Multi-sensory • Comes to life through stories (told by Traditional Owners) • Great physical beauty • World's greatest art gallery • World's oldest continuous living culture • Home (to Traditional Owners) 	<ul style="list-style-type: none"> • Evolving interaction between people and landscape • Sharing place • Caring place • Six seasons • Not for everyone • Learning • Self-discovery beyond expectation • World Heritage status
Brand Personality	
<p>Kakadu National Park has a complex personality of great substance. It is neither male nor female yet both. It is old and it is new. It is wise and it is young. It has many aspects to its rich character. It is traditional and contemporary. It is fun yet serious. It has moments of deep contemplation and quiet relaxation. It is uplifting and inspirational. It is harsh, yet openhearted and welcoming. It is generous in spirit and commands deep respect. Kakadu is unique in the true sense of the word.</p>	
Brand Image	
<p><i>This will evolve in consumers' minds after brand development work (subsequent to this report).</i></p>	
Brand Identity	
<p><i>This will be achieved through subsequent projects when developing a logo, images, tagline, etc.</i></p>	
Positioning Statement	
<p><i>“Kakadu: a country of living culture, home to the Aboriginal people for over 50,000 years. A World Heritage area of awesome natural beauty and spiritual richness. A place which inspires the senses, commands deep respect and provides significant opportunities for self discovery, enlightenment, relaxation and fulfillment.”</i></p> <p><i>Kakadu is a living cultural park, with strong interrelationships between culture, land and seasons. It is a place of local, national and world significance. It has a great impact on people. It is spiritually uplifting, visual enthralling and invigorating to the senses. It is about storytelling. It offers enjoyment and fulfillment. It is a place where the extensive rock art reflects the evolving interaction between people and landscape from 50,000 years ago to the present time.</i></p>	
Unique Selling Proposition	
<p>The unique intertwining of inspiring nature, the six seasons and the ancient culture of its Aboriginal custodians.</p>	

TARGET MARKETS

With limited marketing resources it is best to focus on the most productive markets and the market segments offering the best 'fit' with the destination. An analysis of tourism market research from the domestic and inbound tourism markets, and consideration of the Kakadu National Park visitor experience have enabled identification of the best prospect markets for Kakadu.

DOMESTIC MARKET SEGMENTS

The market segmentation approach adopted for this project is that of *See Australia* (a division of the newly established *Tourism Australia*). *See Australia* identified and defined five robust segments of the domestic tourism market, which in summary are:

- 'Pampadours' (luxury travellers)
- 'True Travellers' (adventure travellers)
- 'Wanderers' (touring travellers)
- 'Groupies' (peer group travellers)
- 'Compatriots' (family travellers - for day visitation)

(For more information contact *See Australia* or visit www.seeaustralia.com.au)

Through reviewing the interests and motivations of these discrete segments, and determining the type of experiences that appeal to each relative to what Kakadu can offer, it is possible to identify the best prospect markets for Kakadu National Park. These are:

**Recommended Prime Target Segments Kakadu from Defined
See Australia Market Segments**

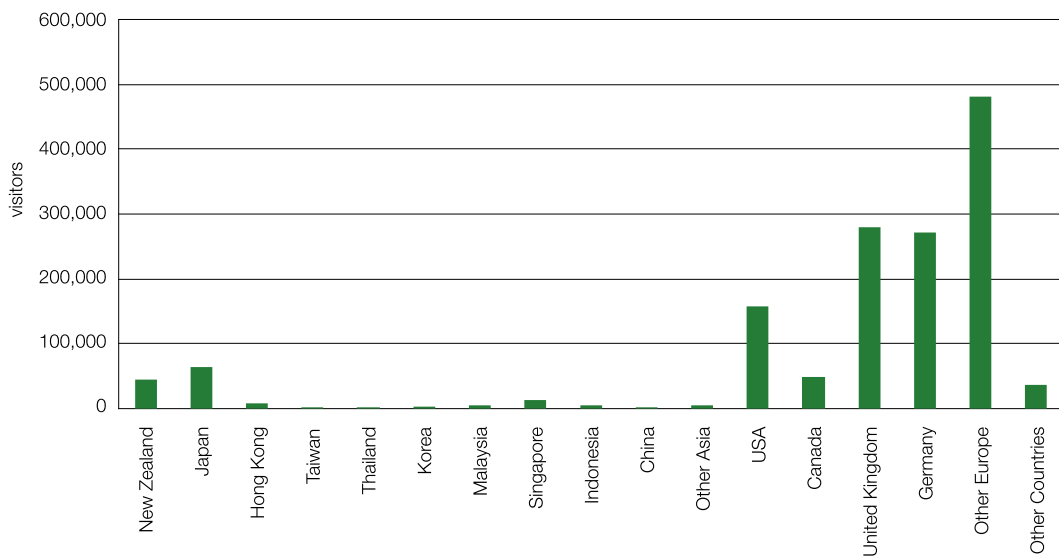
**Recommended Secondary
segment for consideration**

'Wanderers'	'True Travellers'	'Groupies'
<i>17% of potential domestic market</i>	<i>17% of potential domestic market</i>	<i>[Backpacker sub segment]</i>
<ul style="list-style-type: none"> • Both an attitudinal and demographic segment • Marked older skew, nearly half have retired, empty nesters • Frequent tourists (3.03 average trips in past year) • Have second highest holiday spend after 'Pampadours', but look for value for money • Enjoy new and interesting places • Enjoy local markets/fairs for the experience of different localities • Keen observers and like to potter • Mainly off peak and do lots of road touring • Seek out companionship, new sights and horizons • Participation through active observation 	<ul style="list-style-type: none"> • Experimental, adventurous, trail blazing immersion travellers who want to experience a destination in depth • Driven by difference, independence, physicality and immersion. Trail-blazing • Middle Australia (slightly younger + fewer children), but different from 'Compatriots' • Take more holiday breaks than other segments • Opinion leaders • White-collar skew, and highest incidence of full time work • Marginally higher than average spend • Less risk averse • Do not seek out other tourists, averse to homogeneity 	<ul style="list-style-type: none"> • Nearly half under 25 and three quarters under 45, male/student skew • Youthfulness is reflected in their attitude • Single minded physical pleasure seekers • Travel in groups/seek companionship • Physicality, risk and adventure • Travel in peak periods, strong revisitation • Limited budgets • Collect holiday experiences • Lower than average spend • Seek out autonomy and fun • Share peer values and experiences

INTERNATIONAL MARKETS

A number of international markets show a strong tendency to visit Kakadu. Principally they are the United Kingdom, Germany, the United States, and some of the 'Other Europe' grouping (specifically Italy, France and Switzerland). Secondary markets of Canada and Japan offer future growth prospects.

International Visitors to Kakadu 1998 – 2003 combined



The eight primary and secondary international markets selected represent more than 50% of all international travellers to Australia who indicate a preference for outdoor/nature and arts heritage activities and experiences. These markets also represent almost 70% of all visitors to Australia who expressed a preference for an active outdoor experience.

These trends are more pronounced in the above source markets than in other less mature international markets to Australia, further supporting their 'matching' with Kakadu. As an indicator of this, recent research undertaken by the Australian Tourist Commission in Germany identified a number of emotional dimensions that influenced the travel decision process of German international travellers. These included:

Cultural experiences: *The thrill or challenge of being involved in a unique culture immensely different from their own. This is particularly appealing in more evolutionary destinations where swift cultural change was inevitable.*

Sensory experiences: *Associations with vivid multi-sensory experiences. Often associated with more vibrant ethnic cultures that allowed consumers to totally immerse themselves within the destination to generate a greater sense of excitement.*

Heritage: *The ability to understand the cultural identity and depth of a destination through its unique history. (Respondents had a very limited understanding of Australia's historical background).*

Edge: *This sense of 'edge' ranged from adrenalin-focused, challenging activities through to more romantic notions of aspirational 'exotic' destinations which were often inspired by movies, TV, media (such as colonial Africa, ancient Egypt, the Wild West, etc).*

Source: ATC.

ACKNOWLEDGMENTS

We acknowledge and appreciate the assistance from many people in facilitating and contributing to the development of this shared vision and a greater understanding of the many complex issues associated with Kakadu National Park.

We particularly thank the many Traditional Owners who not only contributed their time and views, but in many cases travelled many kilometres to meet with us. The tourism and travel industry representatives based in Kakadu, Darwin and in other areas of Australia, as well as overseas tour operators and wholesalers, all of whom have a great involvement and interest in the future direction of Kakadu National Park, have also contributed significantly to providing insights and information to the report. Other representatives of a wide range of community interests and activities also gave willingly of their time and views.

Representatives of Parks Australia, Kakadu National Park Management, the Northern Land Council and Northern Territory Tourist Commission provided valuable assistance in facilitating arrangements to speak to so many people within a very tight time frame. Michelle Higgins, Meryl Triggs, Tanja Brugmann, Mark Crummy and Richard Austin in particular made most of the arrangements to meet many of the people with whom we spoke.

Northern Territory Tourist Commission and Tourism Australia also provided considerable information and insights relating to visitor patterns and trends that provided the foundation for many of the recommended actions and directions contained in the report.

Throughout the consultation process it was apparent that many people share a great passion for Kakadu and the significant values it represents. We hope we have been able to reflect that passion and attachment felt by so many people in the shared vision and associated recommendations contained in this report.

APPENDICES



"Kakadu provides visitors with the opportunity to go beyond the range of their white vision, to connect with country, and themselves, in a way few other places on earth can..."

John Morse

APPENDIX 1

RELATING BRAND AND SIGNIFICANT TRAVEL AND TOURISM TRENDS

This report identified three important considerations in developing a successful brand for a place.

1. It must uncover and explain its uniqueness.
2. The visitors attracted by the marketing must be of a type sensitive to the social, cultural and environmental values of the place and its people.
3. It must relate to tourism market needs, especially those that are increasing in importance as the motivation for travel for many people is changing.

Whilst the first and second points are self-explanatory, the third point requires some expansion. Positioning a destination in the minds of target markets is a relatively long-term process. In using market trends, it is important to identify them as they are developing. Being 'on trend', is one of the most important factors that determine the success of a brand marketing strategy.

Understanding Trends

Tourism behaviour is influenced by a wide range of factors. Some of these relate to costs and perceived value and some relate to general attitudes towards a whole range of subjects. It is no coincidence, for example, that our changing attitudes towards the environment preceded the rise of tourism involving nature.

In identifying major trends in the attitudes of people we have looked at a wide range of information showing changing attitudes and the things that are driving them:

1. The so-called 'Mega Trends' predicted by 'futurists'.
These include things like 'Individuality in everything', and increasing attention towards spirituality.
2. Major social trends.
In Australia, the most recent census confirms things like an ageing population, and the institutions of marriage, family and household type undergoing significant change.
3. Leisure and recreation trends.
Several sources identify changes in how we are spending our free time. There appears, for example, to be an increasing demand for greater diversity of leisure opportunities and for sites that permit a greater diversity of socially-oriented, healthy activities.
4. Tourism trends.
Several sources from around the world have been reviewed and monitored over a number of years. Some key findings follow.

Recent Tourism Trends

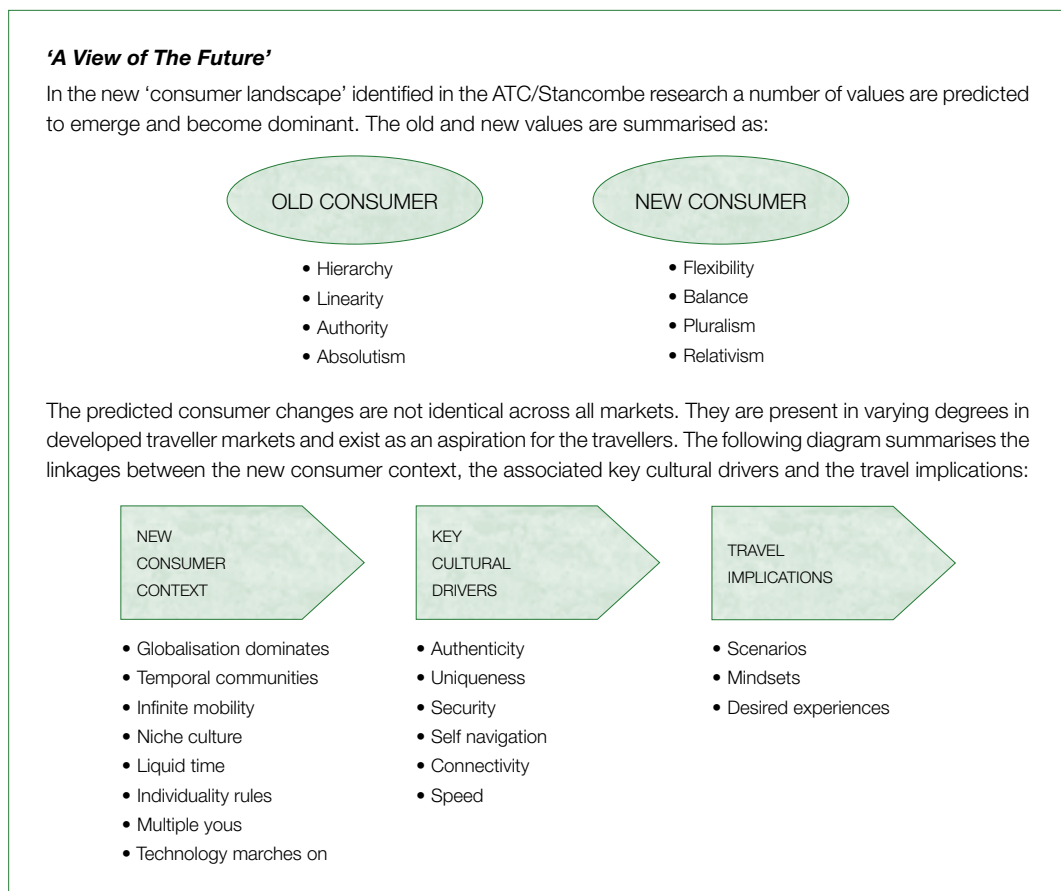
Significant tourism trends identified in recent years include:

- The early nineties saw a shift away from 'old tourism' (mass tourism) to 'new' tourism.
 - One commentator (Auliana Poon) described this shift by using four Ss to compare the two groups. For mass tourists these four Ss were Sun, Sand, Surf and Sex. For new tourists they became Specialisation, Sophistication, Satisfaction and Segmentation;

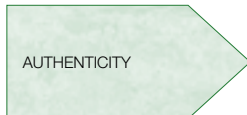
- The acronym 'REAL' (Rewarding, Enriching, Adventuresome and Learning) has also been used to describe this change.
- A significant piece of domestic market research conducted for *See Australia* in 2000 found:
 - "The fundamental stance from which one makes a holiday purchase appears to have changed in the past 15 years. In the mid-eighties, a gap existed between an 'acquisitive' mindset and an 'experiential' one. The acquisitive traveller collected destinations, souvenirs and status. The main point was to have been there. The experiential travellers, rather, opted for 'immersion' in a single destination." (Colmar Brunton, 2000);
 - Overall, the total market was seen to be more 'driven' than it was in the eighties. The researchers identified 'an air of desperation'. They suggested this seemed more a function of reaction to the pace of contemporary living rather than reactions of work alone;
 - In other words, the 'experience' has become more important in many respects than the 'place'.

Predicting Future Trends

One of the most recent and significant pieces of forward-looking research was compiled by the Australian Tourist Commission. It drew upon and added to a highly influential study by the Stancombe organisation called '42'. Key findings from this valuable source are included below.



From a traveller behaviour perspective, it is predicated that various choices will be made depending on the year, the mood, the interests and lifestage. These choices are fluid and the traveller cannot be 'pinned down' or typecast with respect to when, how and for how long he/she chooses to travel. Getting down to practicalities, requirements from the travel experience are predicted as follows.



Focus on what is true, original and enduring in people and experiences as the world becomes more generic



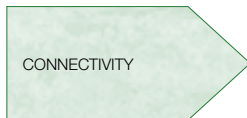
Desire for what can be ours only as globalisation creates a more homogenous world



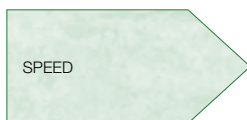
Movement towards what is known, safe and unambiguous arising in the face of rapid change and uncertainty



Reliance on the individual in light of more information, more choices and less guiding structures



Plugging into a collective consciousness of the world on a personal, local and global level



Life is rushed, life is now, life is change and moving faster every day

Source ATC

The New Consumer Mindset

Recent studies undertaken in the United Kingdom have quantified changes taking place in attitudes that are having increasing impact on why people travel and what they seek from their travels. While the study was undertaken in the one European country, it represents similar changes in attitudes taking places in other developed countries and major source markets for Kakadu.

This research found:

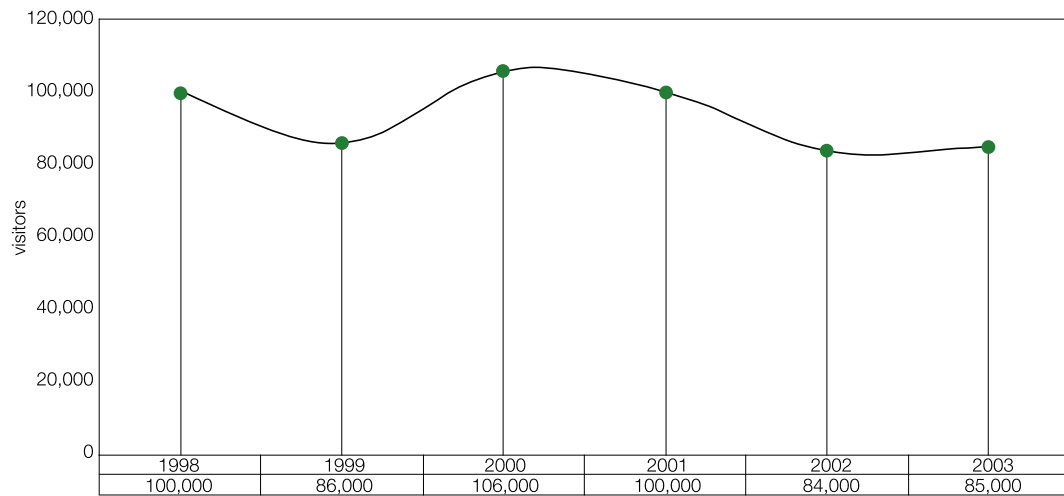
- people are now seeking more substance over style, they are seeking something more and are shunning brands and experiences which are all glitz and no substance. This is particularly noticeable in the 30 – 40+ age groups, who are much wealthier than the generations before them and are able to express their individuality and follow their dreams of self realisation. In many cases they are reacting to work and social pressures. While in most cases they don't want to surrender their affluent suburban lifestyles, they do, however, want to pursue their own dreams and values that are increasingly important to them;
- in these changes, authenticity is becoming increasingly important;
- rather than opting out, people are opting in. They have strong views and an increasing sense of society and community;
- material wealth becomes less important, while learning, self reliance and self actualisation becomes more important. People put more emphasis on the potential of their own skills and energy;
- self improvement and self development are increasingly important;
- the majority of people believe their lives have become too cosseted and predictable;
- inner growth and personal development are more important than wealth or personal wellbeing;
- work and lifestyle pressures are making people increasingly unhappy and unhealthy;
- as a result of their increasing affluence, people are more self-determined and unhealthy;
- people are becoming more determined and proactive in their personal attitudes and outlooks;
- people are becoming less passive in their consumption habits and are less likely to be happy with what is what is 'just dished up to them';
- a large majority of people agree that achieving a balance between personal and professional projects is an important part of life;
- many agree that 'adventure' is once more important and are now able to seek it. They want to 'escape' and 'go it alone';
- most people are keen to learn and immerse themselves in new experiences and cultures;
- the largest majority are no longer wanting to avoid risks, but are keen on learning, gathering knowledge and seeking out 'life changing moments' and to live a life 'less ordinary';

To sum up these changes: In the past people were content to travel to discover new places and things, today increasingly the motivation is to travel to places and do things to discover themselves.

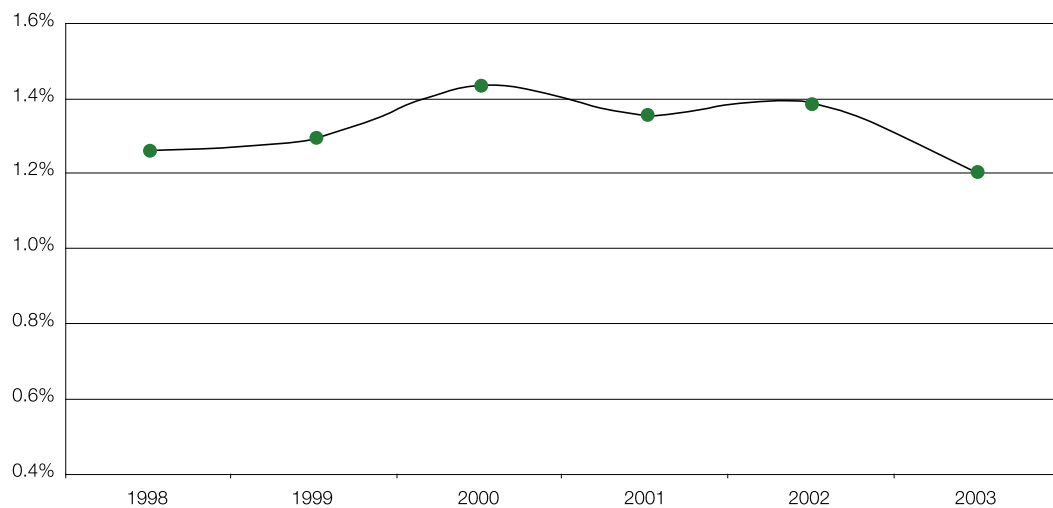
APPENDIX 2

KAKADU VISITATION

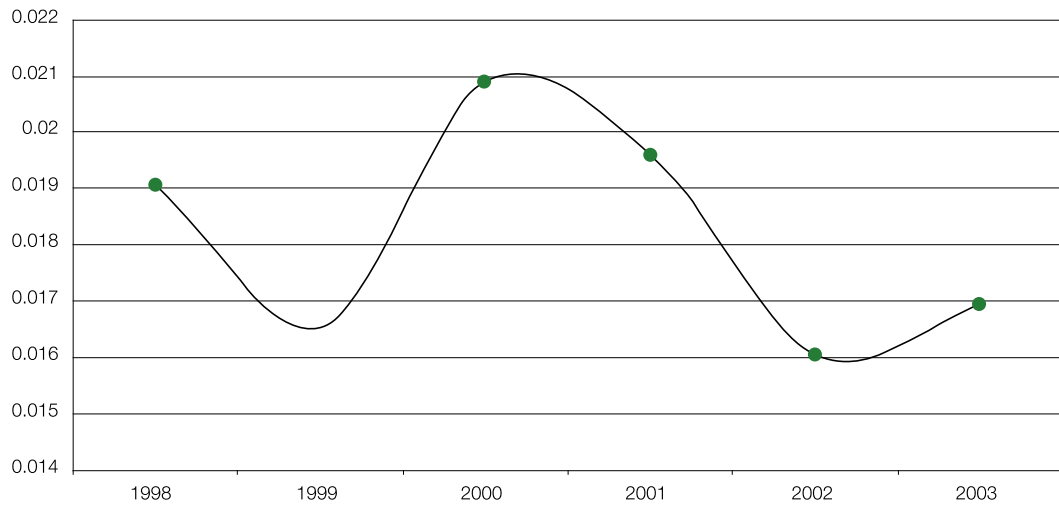
Total Domestic (overnight) Visitors to Kakadu Region



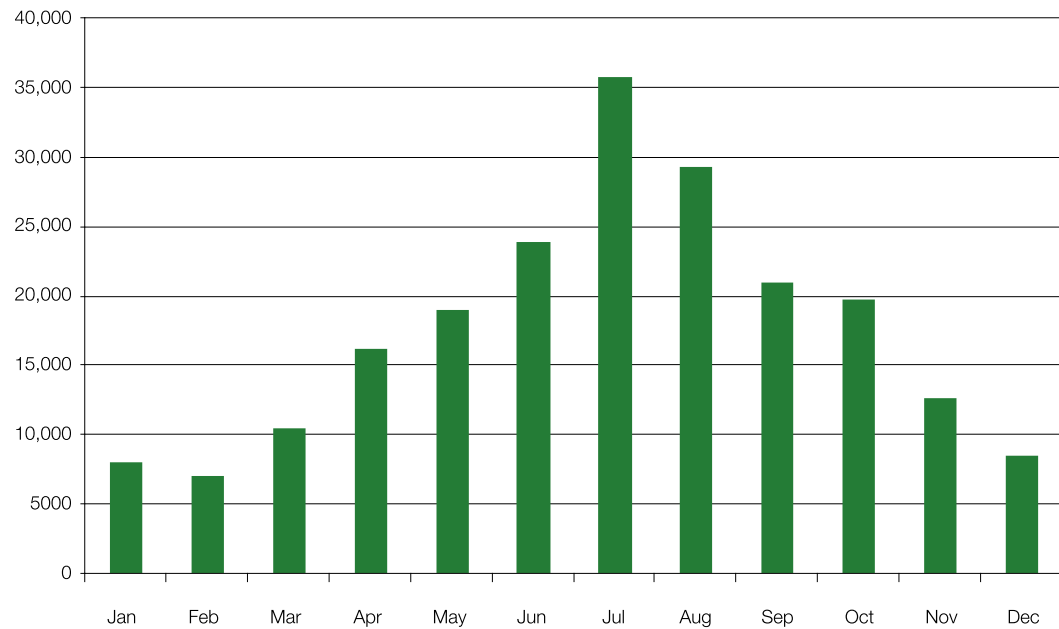
NT Share of Domestic Trips



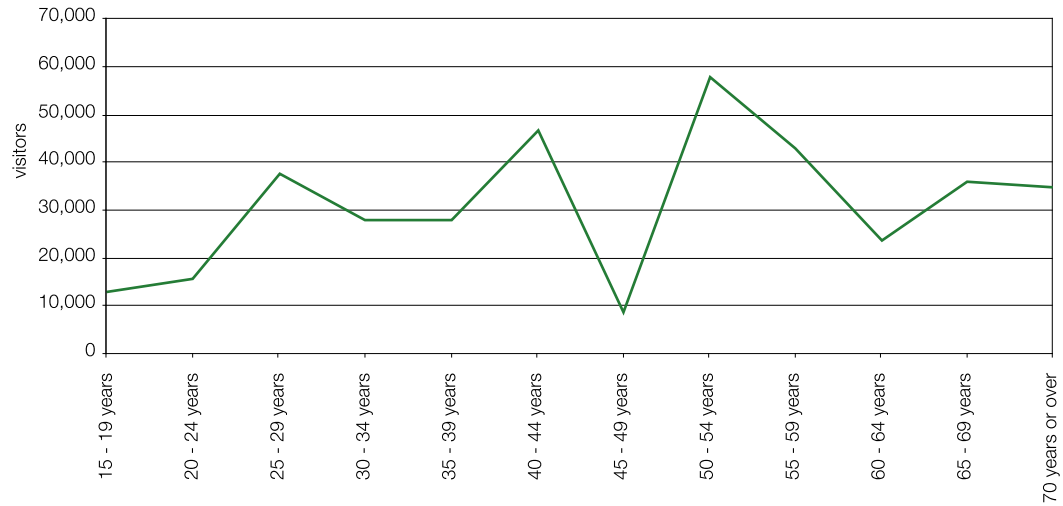
Kakadu Share of Domestic (overnight) Visitors to Outback Competitor Set



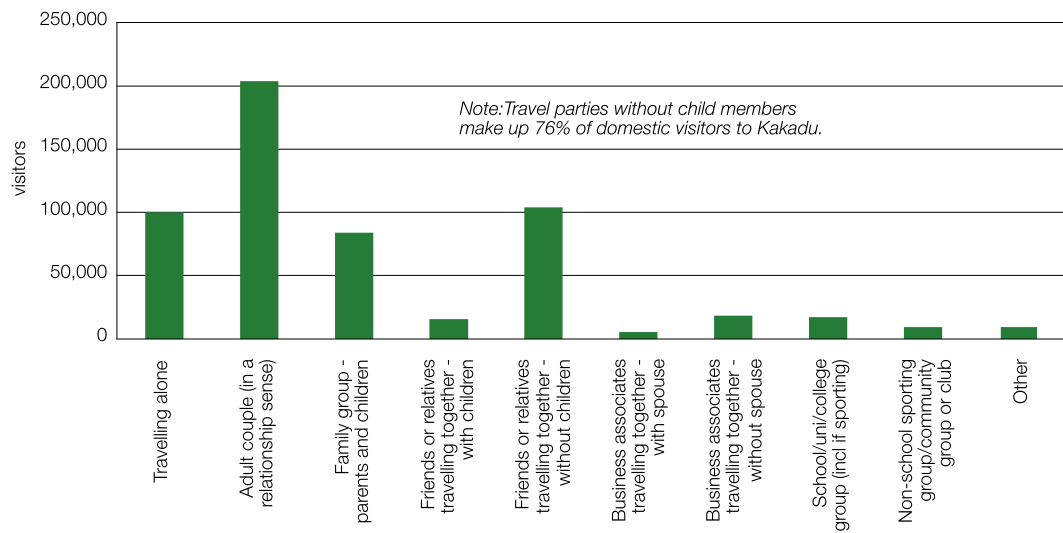
Average 1990-2003 Bowali Pedestrian Counter



Domestic (overnight) Visitors to Kakadu 2000 – 2003 combined by Age Group

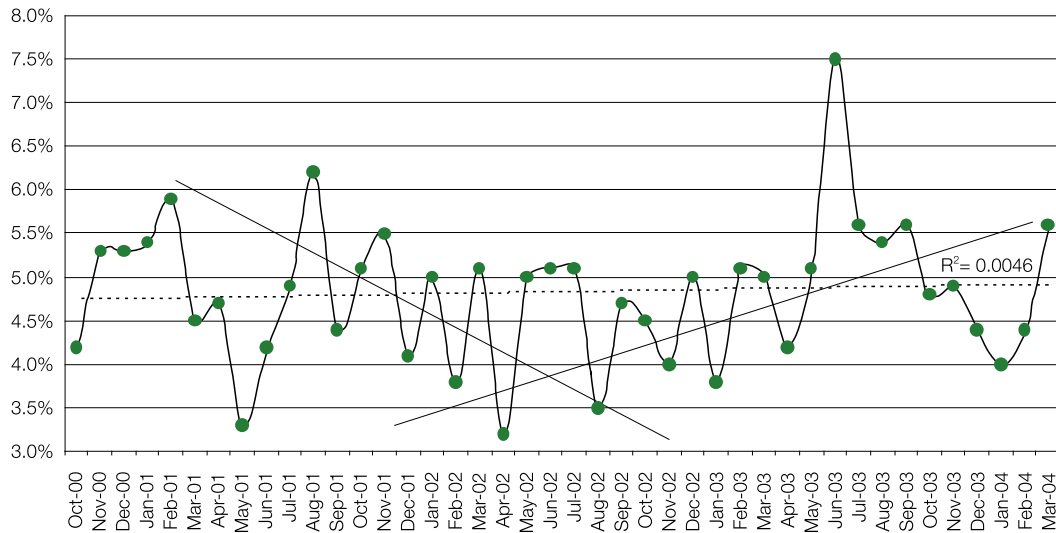


Domestic (overnight) Visitors to Kakadu 1998 – 2003 combined by Travel Party



Kakadu - Domestic Market Preference

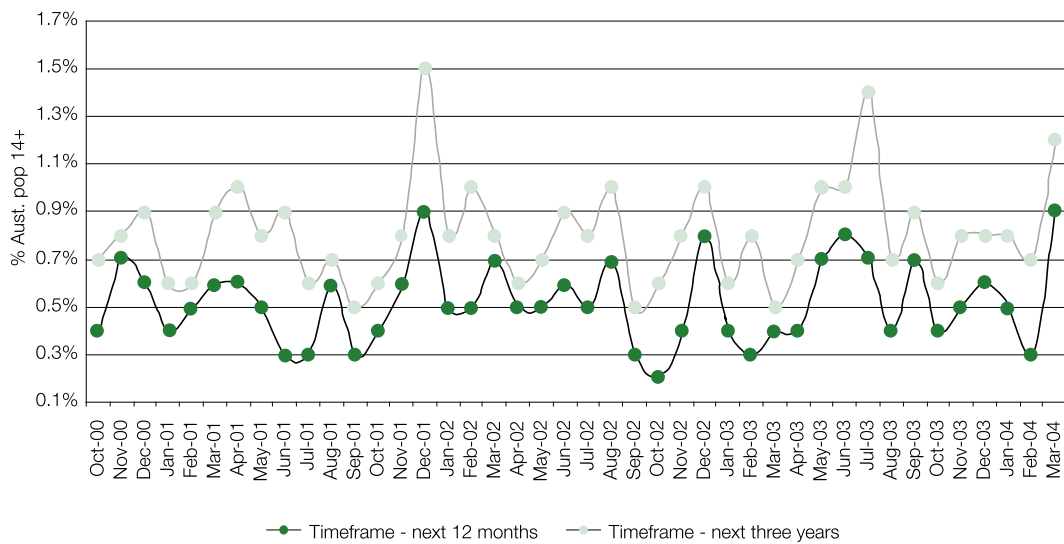
In the next two years, which places would you like to spend a holiday of three or more nights?



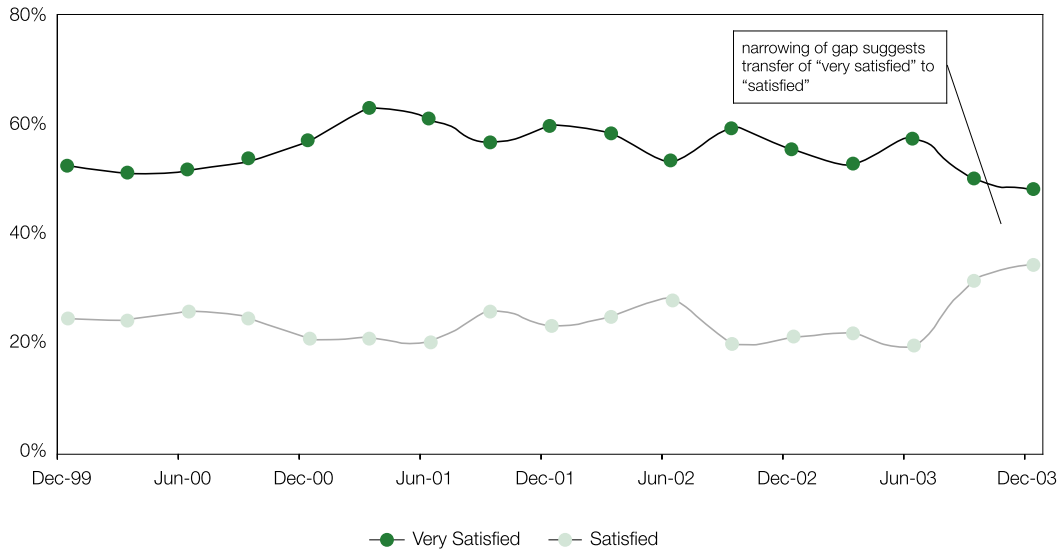
Kakadu - Domestic Market Intention to Visit

“Thinking about your next long trip (of three or more nights).

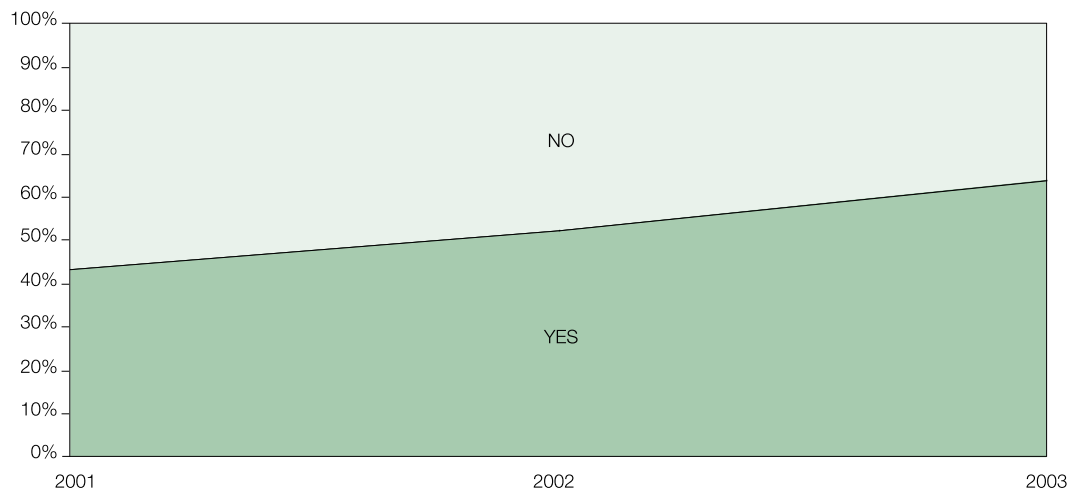
Where will you stay for at least one night on that next long trip?”



Kakadu – Visitor Satisfaction



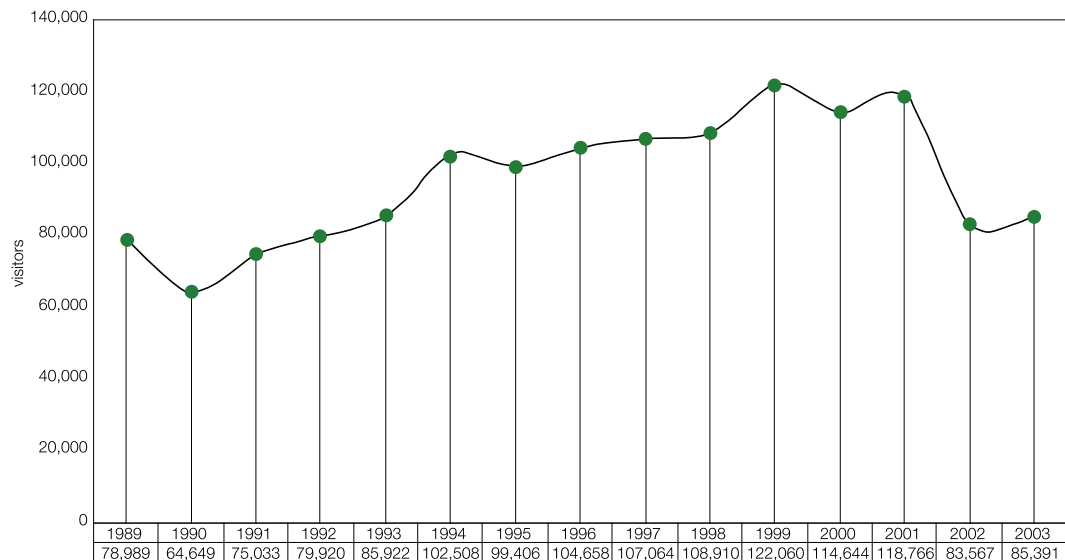
“To see icons (ie Uluru/Jim Jim falls)” influenced decision to come to NT for holiday/pleasure trip



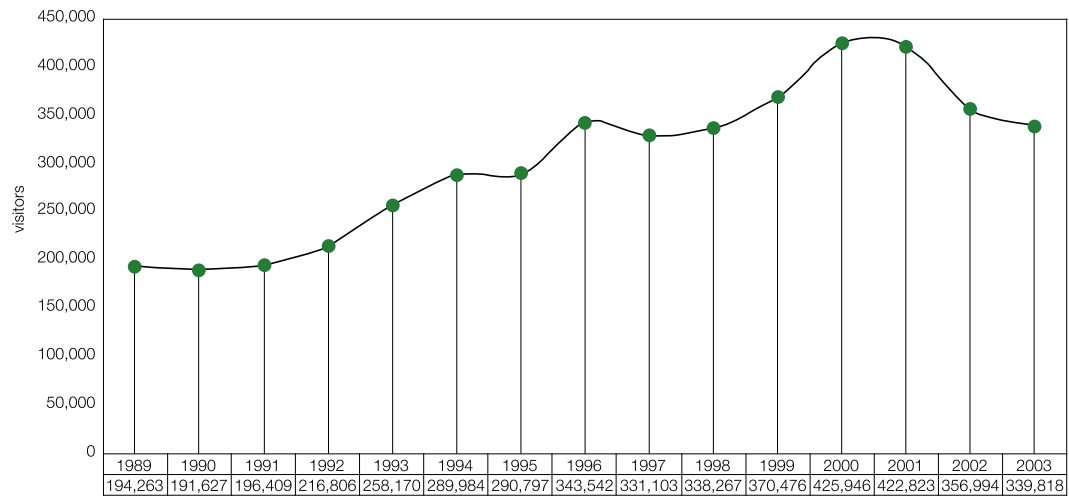
International Visitors – Key Points

- Northern Territory share of international visitors saw little fluctuation over 1989 to 2003. Latter years show some of the lowest share results;
- Northern Territory share of international visitors saw a decline in key markets during past two years;
- Highest visitor share capture for Northern Territory is Germany (averaging 37% 1989-2003), followed by 'Other Europe' (26%), Canada (16%), UK (14%) and USA (14%). Japan average was 7% but in 2003 it was ahead of USA in terms of share (10% vs 8.6%).
- Germany emerges from the visitor share analysis as the market with the greatest propensity to visit the Northern Territory.
- Especially since 1994, there has been a strong correlation between the Northern Territory's share of international visitors and visitor numbers to Kakadu.

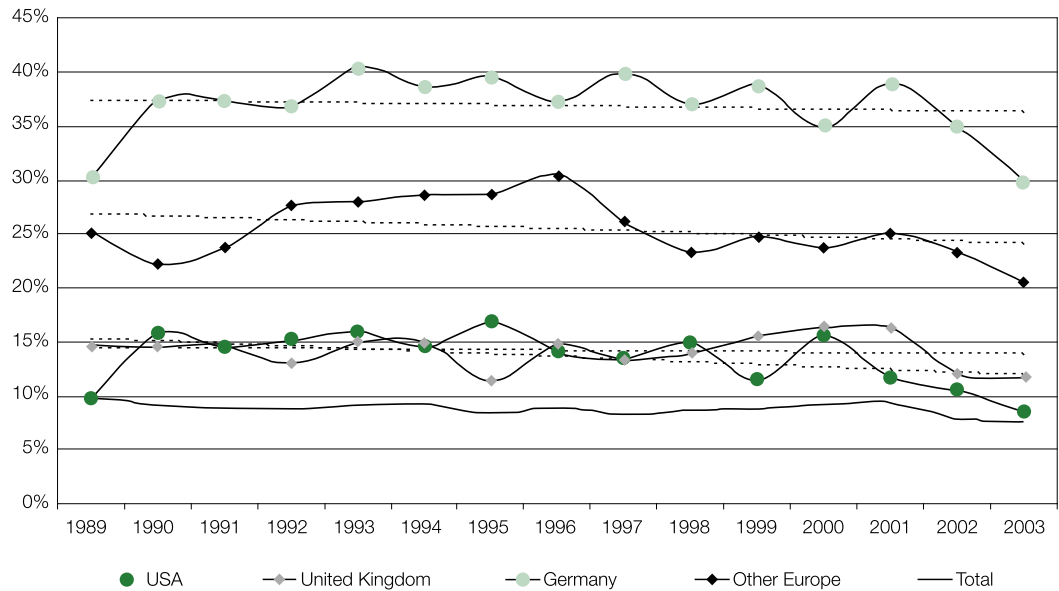
Total International Visitors to Kakadu National Park



Total International Visitors to NT



NT Share of International Visitors



APPENDIX 3

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 - Swimming Issues Paper*
 - Visitor Safety Issues Paper*
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- Kakadu National Park *Visitor Guide* (plus maps and park notes)
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- Documentation from the *Stepping Stones for Tourism Workshop* (March 2004)
- Positive Pathways: Summary of Outcomes from the Jabiru Regional Sustainability Project* (2003)

