

INQUIRY INTO TOURISM IN LOCAL COMMUNITIES

Organisation: NSW Government

Date received: 16/07/2013



Legislative Council

General Purpose Standing Committee No. 3

Inquiry into Tourism in Local Communities

NSW Government Response

July 2013



Inquiry into Tourism in Local Communities

Introduction

The NSW Government's *NSW 2021: A Plan to Make NSW Number One*, sets an ambitious target to double overnight visitor expenditure in NSW by 2020. In 2011, the NSW Government established the independent and industry-led Visitor Economy Taskforce to develop a strategy to achieve this target.

The term 'visitor economy' includes businesses and communities that benefit from the direct and indirect economic activity generated through the wide range of activity that supports the provision of goods and services to overnight visitors including, but not limited to, leisure, business, events, arts/cultural, nature and student visitors.

The review undertaken by the Visitor Economy Taskforce was the largest ever review into the State's tourism and events sectors and involved extensive consultation across industry, community and levels of Government.

The Visitor Economy Taskforce presented their report to the Government in August 2012. In December 2012, the Visitor Economy Industry Action Plan (the NSW Government Response to the Visitor Economy Taskforce Report) was released supporting the vast majority of recommendations made by the Taskforce.

In their report to the Government, the Taskforce identified seven strategic imperatives that need to be executed in order to meet the Government's target. The Taskforce's Terms of Reference required it to focus on the supply issues impacting on the tourism and events sector, such as industry development and infrastructure, as well as on generating demand. Consideration of both demand and supply factors play a role in planning for a sustainable visitor economy and the Taskforce Report and the Government response to the Report addressed both factors.

The Government's response to the Taskforce Report, the Visitor Economy Industry Action Plan, outlines the whole-of-Government commitment to the NSW visitor economy and a long-term strategy for the future that is being implemented in partnership with industry. The Government directs the Inquiry to the Government's Visitor Economy Taskforce Report and the Visitor Economy Industry Action Plan. Copies are available for download from: <https://www.business.nsw.gov.au/doing-business-in-nsw/industry-action-plans/visitor-economy>.

One of the key initiatives from the Visitor Economy Industry Action Plan that will have a direct impact on local communities is the implementation of the Destination Management Planning system, which is being established to facilitate local leadership to grow the visitor economy. The Destination Management Planning process takes a holistic approach to planning which involves the NSW Government working in partnership with local councils, Regional Tourism Organisations and communities to support the sustainable management and growth of destinations, taking into account current and future visitor needs.

Key Government agencies including the Department of Premier and Cabinet, Office of Environment & Heritage, Business Events Sydney and NSW Trade & Investment (Innovation & Industry Policy, Arts NSW, Crown Lands) and the Office of the Small Business Commissioner have provided additional information in relation to the progress of major activities being implemented through the Visitor Economy Industry Action Plan.

Key facts including the economic value of tourism and events to NSW

Tourism Research Australia recently released a report showing that NSW is performing strongly in key economic indicators for visitor expenditure and jobs growth in the tourism sector.

The newly released research shows The Tourism Satellite Accounts, prepared by Tourism Research Australia, estimates the worth of the tourism sector and tourism's contribution to the Australian and NSW economies.

The latest Tourism Satellite Accounts (2010-11) show that there were 159,000 people directly employed in the tourism sector in NSW, almost five per cent of all people employed in the State. The number of people directly and indirectly employed in the tourism sector in NSW increased to 279,000. This is the highest annual increase in the last four years.

Satellite Accounts also show that in 2010-11 the direct value of tourism to the NSW economy was \$10.5 billion, representing a 33.3 per cent share of the national level. It has risen by \$0.5 billion in the latest year. Domestic tourism contributed 69 per cent and international 31 per cent of NSW direct tourism value.

In 2010-11, the tourism industry directly contributed \$11.5 billion to the NSW economy's Gross State Product (GSP). When both direct and indirect factors are included, the NSW tourism industry can be considered to have contributed \$24.3 billion to the State's GSP, or 5.5 per cent of total NSW GSP in 2010-11.

Results from the International Visitor Survey for the Year Ending March 2013, undertaken by Tourism Research Australia¹, show that NSW achieved its highest volumes of visitor numbers, nights and expenditure since the survey commenced in 1999. In terms of domestic visitation, the National Visitor Survey shows that for the Year Ending March 2013, NSW continues to lead all other States in terms of visitor numbers and nights. Of all visitors to Australia during the period, 33 per cent visited NSW and the State also recorded the largest share of visitor nights at 31 per cent.

Information on the NSW tourism industry is attached and further information on visitor statistics for the year ending March 2013 are available on Destination NSW's corporate website at: <http://www.destinationnsw.com.au/tourism/facts-and-figures>.

In addition to leisure tourism, business events are drivers of significant economic value to the State through delegate expenditure, yielding an average return on every Government dollar invested of 32:1 over the last four years.

During 2012, Business Events Sydney delivered 91 events with an estimated economic impact of \$217.7 million to NSW. Currently, therefore, with an investment by the NSW Government of \$5.66 million, business events generate some \$187 million in direct economic benefit.

Major attractions are significant visitor economy assets that contribute to the State's visitor economy. For instance, Sydney's iconic Taronga Zoo and in regional NSW, Taronga Western Plains Zoo at Dubbo make significant contributions to the State's economy. Specifically, Taronga Western Plains Zoo attracts over 220,000 visitors annually and has seen over 8 million visitors pass through its gates over 36 years of operation.

¹ Tourism Research Australia is a branch of the Commonwealth Department of Resources, Energy and Tourism (RET) that provides statistics, research and analysis to support industry development, policy development and marketing for the Australian tourism industry.

More than 11,500 visitors undertook overnight programs within the zoo in the 2012 year. Taronga Western Plains Zoo ensures that the region benefits from significant intra- and inter-state visitation; in 2012, around 89 per cent of visitors were from outside the local regional area including 26 per cent from the Sydney Metropolitan area.

Regional NSW offers a range of unique cultural activities and events which attract visitors and play an important role in sustaining diverse regional economies. Some NSW regions have a greater reliance on cultural tourism. Destination NSW's Cultural and Heritage Tourism to NSW report (year end December 2012) found that Outback NSW (82.5%) had the highest proportion of international visitors who engaged in a cultural and heritage activity. The South Coast sub-region (79.0%) had the second highest proportion, followed by the Blue Mountains (76.2%). The Northern Rivers (70.7%) had the highest proportion of nights spent by cultural and heritage visitors, followed by Sydney (63.2%) and The Hunter region (60.9%).

In terms of events, the Deniliquin Ute Muster was awarded the Gold Prize at the 2012 National Qantas Australia Tourism Awards, and two major regional NSW festivals were recognised for their contribution to cultural tourism at the 2012 NSW Tourism Awards: The 2012 Tamworth Country Music Festival and the 23rd Annual Bluesfest in Byron Bay.

In 2013, Bluesfest attracted 104,244 visitors over five days. During this period, 1,127 room nights were booked by Bluesfest for its artists performing at the Festival and a further 1,925 room nights for Bluesfest's touring artists around Australia.

The NSW Government, through Destination NSW, the National Parks and Wildlife Service and Arts NSW has a number of programs in place that support tourism and events activities. Consultation undertaken by the Visitor Economy Taskforce identified the need for a new approach to the delivery of funding support to the NSW tourism industry. The Visitor Economy Industry Action Plan established reforms to the funding framework for regional tourism. Funding is now allocated directly to regional destinations which have developed a Destination Management Plan and the requirement that all funding must only be provided through the Regional Tourism Organisation network was removed.

In April 2013, the NSW Government launched the Regional Visitor Economy Fund administered by Destination NSW. The new Fund supports a broader range of participants in regional tourism who will contribute to the NSW Government goal of doubling overnight visitor expenditure in NSW by 2020.

The total value of the Fund is \$21.6 million over three years, a record level of funding for the promotion of regional tourism in NSW. In the 2013/14 financial year the NSW Government will contribute more than \$7.2 million dollars to the Fund through two funding streams, \$3.7 million in Regional Tourism Organisation Quarantined Funds and a Contestable Pool of Funds valued at \$3.5 million. This represents a \$2 million increase on previous funding and demonstrates a commitment to regional communities which can prosper through well managed tourism and events.

The Fund supports projects and initiatives that align to the strategic imperatives of the Visitor Economy Industry Action Plan that demonstrate a return on investment and that will contribute to achieving the NSW Government's target of doubling overnight visitor expenditure in NSW by 2020.

The Destination Management Planning system is being established to facilitate local leadership to grow the visitor economy. It is a holistic approach to planning to support the sustainable management and growth of destinations, taking into account current and future visitor markets and requirements.

Destination Management Planning considers all aspects of the visitor economy in relation to current and future planning for the destination, including for example, identifying essential tourism infrastructure needs such as accommodation and transport links, development of local attractions, for instance, entertainment precincts and coordination and alignment of tourism and events promotion and marketing.

Destination NSW has recently delivered a series of free workshops throughout NSW to inform industry, community and Government stakeholders about Destination Management Planning and enable stakeholders to access support while they develop their Destination Management Plans. Destination NSW has also provided Destination Management Plan templates and guides to Regional Tourism Organisations. Destination NSW will also work with NSW Trade & Investment to engage all stakeholders in the destination management planning process.

Key Visitor Economy Industry Action Plan initiatives

Case study: Destination Management Planning Partnership - National Landscapes

The Visitor Economy Industry Action Plan supports the incorporation of National Landscapes (iconic nature tourism destinations) and World Heritage Areas within NSW into relevant Destination Management Plans to better plan and manage these experiences and the sustainable growth of visitation and visitor spend.

In addition to working closely with Destination NSW and Regional Tourism Organisations to ensure NSW's national parks and nature-based tourism experiences feature appropriately in Destination Management planning, National Parks and Wildlife Service (NPWS) has adopted **NSW's five National Landscapes** – each of which incorporate significant stretches of national parks estate – as a framework for planning and prioritising tourism strategy and experience development, as well as marketing, for the agency.

The National Landscapes program is a partnership between Parks Australia and Tourism Australia that seeks to promote Australia's superlative natural landscapes. The five National Landscapes in NSW include:

- Sydney Harbour
- Greater Blue Mountains
- Australian Alps (cross-tenure with Victoria)
- Australia's Coastal Wilderness (cross-tenure with Victoria)
- Australia's Green Cauldron (cross-tenure with Queensland).

NPWS plays an active role in each of the National Landscapes Committees, which include a range of stakeholders, including local tourism operators, community representatives, local councils and land managers. The Committees focus on the sustainable development of tourism opportunities in local communities.

Each National Landscape is required to have an Experience Development Strategy (EDS) for the identification and local delivery – in collaboration between public and private enterprise – of new experiences and packaging opportunities to drive destination appeal and increase tourism to the regions within the Landscape. EDS's have been developed for the Australian Alps, Australia's Coastal Wilderness, and Australia's Green Cauldron, and are currently in development for Sydney Harbour and Greater Blue Mountains.

Further information relating to the Regional Visitor Economy Fund and Destination Management Planning system is available at:

<http://www.destinationnsw.com.au/tourism/business-development-resources/funding-and-grants/regional-visitor-economy-fund-rvef>.

Case study: Role of Office of Environment and Heritage and Crown Lands

The Office of Environment and Heritage (OEH) network of parks, gardens and zoos are significant public assets that also support the NSW visitor economy and greatly contribute to regional economies.

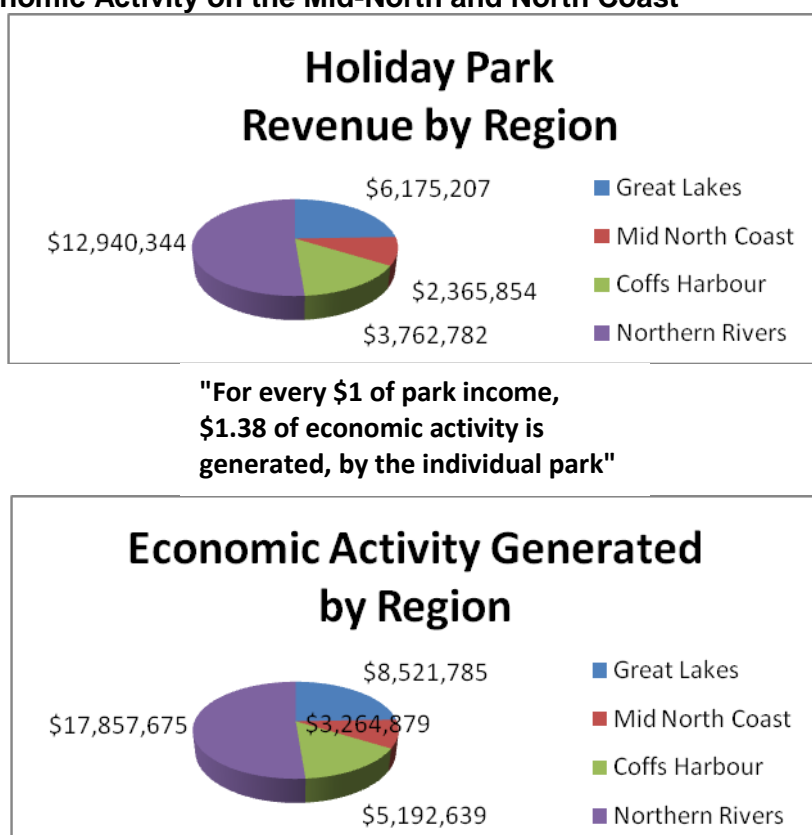
Crown Land reserves are an integral part of regional, rural and coastal communities from an economic, social and environmental perspective. The Crown Lands Division of NSW Trade & Investment undertakes a role to ensure the State's infrastructure and assets on Crown land are managed for the benefit of the entire community. A significant proportion of tourism assets and destinations in New South Wales are located on Crown lands.

Case study: North Coast Accommodation Trust

The North Coast Accommodation Trust is an example of how Crown Land reserves drive tourism activity and sustain local communities. The Trust manages Crown Land reserves along the mid-north and north coasts. Twenty-three holiday parks managed by the Trust provide more than 3000 accommodation sites for camping and cabins which generate approximately \$25 million in revenue each year.

According to CRVA data (Economic benefit of a commercial caravan park to a local community), every \$1.00 of park income generates \$1.38 of economic activity. This means the \$25 million in revenue generated by the North Coast holiday parks leads to more than \$34 million in economic activity throughout regional communities in the mid north and north coasts – see Figure 1.

Figure 1: Economic Activity on the Mid-North and North Coast



This economic activity benefits the local communities, and the tourism sector. The North Coast's holiday parks generate economic activity in locations up and down the mid-north and north coasts – as well as direct investment in approximately 170 hectares of other Crown

Reserves including important foreshore and other assets which are integral components of those local and regional communities along the coast. The North Coast holiday parks also provide a further contribution to the Public Reserves Management Fund via the coastal caravan park levy, which in turn provides funds to other Crown land reserve managers across the State.

This example of a holiday park is replicated at other Crown land reserves across the State.

Case Study: Future of Business Events and Tourism in Sydney

The NSW Government has made a significant investment in the redevelopment of the Sydney International Convention, Exhibition and Entertainment Precinct. Business Events Sydney have a key role to play in securing business events for Sydney. The capital cost of the new state-of-the art facilities and upgrade to the public domain is estimated at around \$1 billion.

As part of the Sydney-wide solution to ensure NSW's events industry continues to thrive during the redevelopment, the Government has committed to building interim exhibition facilities at Glebe Island which will be in place for the 2014 exhibition season, comprising a minimum of 20,000 square metres of specially designed exhibition and tradeshow space. Business Events Sydney is actively participating in the redevelopment process and is assisting Infrastructure NSW and the Sydney Harbour Foreshore Authority to forecast event opportunities, ensuring that the development is future-focused.

In addition to the funding received from the NSW Government, the City of Sydney will invest a further \$1.5 million to promote Sydney as a world-class conference city during the closure of the Convention Centre, attracting tens of thousands of visitors who will contribute millions to the local economy.

The City will invest \$500,000 a year over the next three years in Business Events Sydney, to assist in driving smaller events to the existing assets (hotels, smaller venues etc.) during the closure.

Labour and Skills

All States, Territories and the Commonwealth Governments are working through the national tourism strategy, *Tourism 2020*. In 2011, the *Australian Labour Tourism Force Report*² was published as a *Tourism 2020* initiative. The report found that there are an estimated 35,800 tourism vacancies across Australia and by 2015, an additional 56,000 people will be needed to fill vacancies (including 26,000 skilled positions).

State, Territory Tourism Organisations and the Commonwealth are developing Tourism Employment Plans through *Tourism 2020* for eight selected regions across Australia. A Tourism Employment Plan for Sydney is in development under the guidance of a Steering Committee comprising key industry representatives. The aim of the Plan is to deliver industry driven and practical measures to address labour and skills issues in the Sydney region. The Plan will link also tourism businesses with relevant support programs, for example, in education, training and employment. Additional information on this initiative is available at:

<http://ret.gov.au/tourism/policies/nltts/workinggrps/labour/TEPs/Pages/default.aspx>.

² Australian Tourism Labour Force Report, prepared by Deloitte Access Economics for the Labour and Skills Working Group and the Department of Resources, Energy and Tourism.

The NSW Government, through Destination NSW, employs an Aboriginal Tourism Specialist who works across the sector. The key function of this role is to provide assistance to Aboriginal tourism businesses which has resulted in many of them being able to make progress in their development of a business. In addition, the Aboriginal Tourism Specialist has been successful in establishing strong working relationships with the various government agencies involved in this area and with Aboriginal communities.

The Aboriginal Tourism Specialist has worked with businesses to gain their inclusion in the Indigenous Tourism Champions Program. This Program was established in 2009 by Tourism Australia and Indigenous Business Australia with significant support and involvement from State and Territory Tourism Organisations. It is a national initiative which provides access to business development specialists, targeted funding and international and trade marketing for selected Indigenous tourism businesses by aligning Indigenous Business Australia's investment in business development and mentoring with Tourism Australia's tourism marketing initiatives, for selected quality Indigenous tourism experiences.

Indigenous tourism operators must be nominated by their State Tourism Organisation and apply and meet the criteria for inclusion in the Program. In 2013, Destination NSW nominated 16 suitable Aboriginal tourism experiences for the Program and worked closely with them on product development and marketing. Of these 16, a total of 14 were successful in being included in the Indigenous Tourism Champions Program.

Other initiatives focussing on the Indigenous community include the new Corroboree annual festival, a Visitor Economy Taskforce Report recommendation. The first Corroboree will be held over 11 days, from 14 November to 24 November 2013, in partnership with nine of Sydney's major arts and cultural institutions which have strong Indigenous programs. Corroboree has unprecedented support from the Indigenous community and is aimed at bringing together Indigenous art and culture from around the nation, to become one of Australia's major cultural events. Corroboree is funded by the NSW Government, through Destination NSW, for the next three years.

Tourism and Events Marketing

Over the past 12 months Destination NSW has worked with partners to deliver marketing campaigns to increase awareness of and drive visitation to NSW destinations. These marketing activities have generated over 12 million visits to Destination NSW's tourism websites – a 48.5 per cent year on year increase – and over 2.5 million direct leads to the NSW tourism industry – a 56 per cent year on year increase.

Destination NSW also works with corporate and Government partners to increase visitation to the State by leveraging events, including identifying and delivering event sponsorship and event marketing opportunities to drive visitor expenditure.

Tourism packages for interstate and international visitors are created with travel wholesalers and can include tickets to an event with airfares and accommodation. Media and travel trade familiarisation trips are conducted to showcase an event and a destination providing hands-on experience to promote tourism products by trade and travel journalists creating national and international exposure in key markets for events which are exclusive to NSW. On completion, these tours lead to increased bookings for the tourism industry and media coverage for specific destinations.

The NSW Government, through Destination NSW, also works closely through marketing partnerships with Australian and international airlines and Sydney Airport to increase air travel into the State. In April this year, the Government signed a three-year agreement with Qantas to formalise a new \$30 million partnership to promote Sydney and regional NSW to

the world. This is the largest tourism and major events marketing partnership in the State's history, in which Qantas will match Destination NSW dollar-for-dollar to attract more international visitors. The partnership places particular emphasis on the United States, United Kingdom, Continental Europe, China, South-East Asia, Japan and New Zealand which are the overseas markets identified in the Visitor Economy Taskforce Report.

Social media is a critical component of the contemporary marketing mix. Destination NSW utilises a range of social media channels including Tourism Facebook fans, Twitter followers, YouTube video views and Google+. NSW has up to 35 per cent of the total share of website visits to all State Government Tourism websites in Australia with the closest being Tourism Victoria with just over 18 per cent. Destination NSW's consumer websites, visitnsw.com and sydney.com, are now ranked within the Top 15 Destination and Accommodation Websites in Australia.

In addition to visitnsw.com and sydney.com, the Government delivered on a major commitment to provide visitors with significantly more content, simple-to-navigate functionality, and an inspirational look and feel through the launch of a new visitor website for NSW National Parks.

The new website, nationalparks.nsw.gov.au, was launched in May 2012 and profiles more than 180 national parks and reserves and over 1000 park activities and attractions around NSW. The platform integrates Google maps, social media, and an online booking system for more than 70 campgrounds and holiday accommodation offerings in parks around NSW. Further work is underway, with digital engagement and mobile strategies in development, along with further enhancement of mapping and park attractions content.

In line with trends for Destination NSW, the National Parks and Wildlife Service reports that their website is experiencing significant growth in visitation month on month. In its first year it has already attracted more than 1 million visitors and increased exposure to accommodation facilities across regional NSW through the introduction of the online reservation system.

Regulation

Tourism operators are required to comply with the legislation pertaining to their specific area of business.

National Parks Regulations

Tourism business owners in NSW operate within national parks and this is an instance where there is specific legislation and regulations in place. One of the objectives of the *National Parks and Wildlife Act 1974* (NPW Act) is to facilitate opportunities for people to appreciate and enjoy NSW's national parks, and foster a life-long connection with the environment and support for conservation. Over recent years, the National Parks and Wildlife Service has been working closely with government, private sector and community based organisations to support this intent through the development of new tourism and recreation experiences that showcase the State's outstanding nature and heritage.

In October 2010, the *National Parks and Wildlife Amendment (Visitors and Tourists) Act 2010* commenced. The legislation strikes a balance between connecting people to nature, and the ongoing conservation of natural and cultural park values. It created a single, simple provision that clearly sets out the purposes for which leases and licences can be granted on park. It also sets high environmental standards for leases and licences with the inclusion of the requirement that the Minister must be satisfied of particular sustainability factors and take into account sustainability criteria before granting any lease or licence.

In addition to considerations under the NPW Act, heritage and environmental impacts are considered in accordance with the *Environmental Planning and Assessment Act 1979* and the *Heritage Act 1977* when new opportunities are proposed in parks.

Delivering tourism opportunities in NSW's national parks is also carefully managed through branch and regional operations plans and park plans of management. The plans set the framework for how individual parks are to be managed into the future, with consideration to the specific values of a protected area and a positive, sustainable approach to tourism and visitation within that context. Plans of management are prepared in consultation with Regional Advisory Committees and the National Parks and Wildlife Advisory Council and are publicly exhibited so local communities also have a say in how their parks are managed.

In addition, the National Parks and Wildlife Service manages a licensing system for commercial tour operators delivering business at parks. The Parks Eco Pass program recognises the invaluable role played by commercial tour operators, in partnership with the National Parks and Wildlife Service, in promoting the State's parks and encouraging visitors to appreciate, understand and enjoy them. The program ensures a high level of operating standard and encourages ecologically sustainable and culturally appropriate tourism use. The program also encourages accreditation through relevant industry bodies to support improvements to performance, professionalism and standards by commercial tour operators.

Small Business

There are more than 96,000 businesses involved in tourism in NSW and an estimated 50 per cent are small or micro businesses. The NSW Government established the Office of the Small Business Commissioner to provide dispute resolution services, deliver quality business advice through Small Biz Connect and speak up for small business within government. Current areas of focus relevant to tourism businesses include investigating and advocating for small business on the impact of the NSW planning system, national awards and penalty rates.

About Destination NSW

Destination NSW is a NSW Government statutory authority with responsibility for devising and implementing strategies to grow the visitor economy, with particular focus on driving tourism and acquiring and developing major sporting and cultural events for Sydney and regional New South Wales. In addition, Destination NSW is the major investor in Business Events Sydney with the aim to secure more international conventions, incentive travel reward programs, corporate events and exhibitions for Sydney and regional NSW.

Its vision is to make Sydney and NSW one of the world's most successful tourism and events destinations and maximise the benefits of the visitor economy for NSW. Its key objective is to achieve the NSW Government's target of doubling overnight visitor expenditure in NSW by 2020.

Destination NSW's divisional responsibilities include the functions formerly carried out by Tourism NSW, Events NSW and the Homebush Motor Racing Authority and the Greater Sydney Partnership. The organisation works in conjunction with existing bodies such as Business Events Sydney and Regional Tourism Organisations.

NEW SOUTH WALES

Visitors (YE March 2013)

NSW received 81.2 million visitors

- 27.8 million overnight visitors
 - o 2.9 million international visitors
 - o 24.9 million domestic o/n visitors
- 53.4 million day trip visitors

(Source: TRA March 2013, IVS and NVS data)

Visitor Nights (YE March 2013)

NSW received 152.8 million visitor nights

- 45% were from international visitors
- 55% were from domestic visitors

(Source: TRA March 2013, IVS and NVS data)

Expenditure (YE March 2013)

Total visitor expenditure to NSW was \$26.2 billion

- Overnight visitors spent \$20.4 billion in NSW
 - o 32% came from international visitors
 - o 68% came from domestic visitors
- Day trip visitors spent \$5.8 billion in NSW

(Source: TRA March 2013, IVS and NVS data)

Business

- There are 96,546 businesses involved in tourism in NSW
- NSW has 1,391 accommodation establishments (hotels, motels and serviced apartments with 15+ rooms)

(TRA Tourism Businesses in Australia, 2009-2011; ABS STA, Dec Qtr. 2012)

Employment

- Tourism directly employs 159,000 people.
- This accounts for 1 in 22 jobs in NSW

(NSW Tourism Satellite Accounts, 2010-11)

SYDNEY

Visitors (YE March 2013)

Sydney received 30.0 million visitors

- 10.3 million overnight visitors
 - o 2.7 million international visitors
 - o 7.5 million domestic o/n visitors
- 19.7 million day trip visitors

(Source: TRA March 2013, IVS and NVS data)

Visitor Nights (YE March 2013)

Sydney received 78.1 million visitor nights

- 74% were from international visitors
- 26% were from domestic visitors

(Source: TRA March 2013, IVS and NVS data)

Expenditure (YE March 2013)

Total visitor expenditure to Sydney was \$13.3 billion

- Overnight visitors spent \$11.1 billion in Sydney
 - o 52% came from international visitors
 - o 48% came from domestic visitors
- Day trip visitors spent \$2.2 billion in Sydney

(Source: TRA March 2013, IVS and NVS data)

Share of NSW tourism

- *Sydney received:*
 - 30% of domestic overnight visitors to NSW
 - 93% of the international visitors to NSW

(Source: TRA March 2013, IVS and NVS data)

Business

- There are 61,374 businesses involved in tourism in Sydney
- Sydney has 283 accommodation establishments (hotels, motels and serviced apartments with 15+ rooms)

(TRA Tourism Businesses in Australia, 2009-2011; ABS STA, Dec Qtr. 2012)

REGIONAL NSW

Visitors (YE March 2013)

Regional NSW received 52.1 million visitors

- 18.5 million overnight visitors
 - o 581,000 international visitors
 - o 17.9 million domestic o/n visitors
- 33.6 million day trip visitors

(Source: TRA March 2013, IVS and NVS data)

Visitor Nights (YE March 2013)

Regional NSW received 74.5 million visitor nights

- 15% were from international visitors
- 85% were from domestic visitors

(Source: TRA March 2013, IVS and NVS data)

Expenditure (YE March 2013)

Total visitor expenditure to Reg. NSW was \$12.9 billion

- Overnight visitors spent \$9.4 billion in Reg. NSW
 - o 7% came from international visitors
 - o 93% came from domestic visitors
- Day trip visitors spent \$3.5 billion in Reg. NSW

(Source: TRA March 2013, IVS and NVS data)

Share of NSW tourism

- *Regional NSW received:*
 - 72% of domestic overnight visitors to NSW
 - 20% of the international visitors to NSW

(Source: TRA March 2013, IVS and NVS data)

Business

- There are 35,176 businesses involved in tourism in Regional NSW
- Regional NSW has 1,108 accommodation establishments (hotels, motels and serviced apartments with 15+ rooms)

(TRA Tourism Businesses in Australia, 2009-2011; ABS STA, Dec Qtr. 2012)

Inquiry into tourism in local communities

Office of Environment and Heritage (OEH) contribution to Government submission

Introduction

The OEH network of parks, gardens and zoos is a significant public asset that supports the tourism industry and greatly contributes to regional economies.

The Government is committed to developing new and innovative approaches to improving visitor and community access to our parks and reserves. It is also committed to doubling tourism expenditure by 2020 and our national parks, gardens and zoos have an important role to play by attracting people to regional NSW and encouraging them to stay longer.

In NSW, there are more than 880 national parks and reserves, covering over 9% of the state, stretching from the outback deserts, through the inland river and wetland systems, across Australia's highest mountain and along our spectacular coastline.

In addition to Sydney's renowned Royal Botanic Garden and Taronga Zoo, OEH also manages the regionally based Australian Botanic Garden at Mount Annan, the Blue Mountains Botanic Garden at Mount Tomah and the Taronga Western Plains Zoo (TWPZ) at Dubbo.

Visitors to national parks have the opportunity to experience and enjoy a range of activities and experiences, including mountain bike riding, horse-riding, recreational fishing, kayaking, alpine skiing, bushwalking or simply picnicking in the great outdoors.

OEH recognises that in managing NSW's parks and reserves, it is critical to engage with state and regional tourism organisations, local councils, other significant landholders and natural resource managers. OEH's agencies actively participate in a range of activities to facilitate cross-tenure planning and land management programs with these stakeholders, including recreation and tourism planning, delivery and marketing.

The following contribution is structured around the inquiry's terms of reference.

1. Value of tourism to NSW communities and the return on investment of Government grants and funds; and

2. Value of tourism to regional, rural and coastal communities

1-2(a) Visitation statistics

1-2(a)(i) *National parks visitation*

The National Parks and Wildlife Service (NPWS) undertakes a biennial domestic visitation survey to estimate the number of visits to NSW's national parks per annum, along with recreation preferences, demographics and satisfaction levels. This information is critical for building a robust understanding of park visitors and their visitation trends for the effective planning and management of infrastructure, experiences, opportunities and information to meet visitor and community needs.

The first research results were delivered in 2008 and the third biennial cycle of research has just been completed for 2012, with reporting in its final stages. Early findings indicate that:

Addendum

- In 2012, park visitation was estimated at **35.5 million visits**, including 28.7 million adult and 6.8 million child visits. **This is an increase of 5%** on 2010 results (33.8 million).
- Half of all visits in 2012 were to national parks within the Sydney metropolitan and Snowy Mountains regions.
- Parks in NSW's west received their highest recorded visitation levels since the research commenced, experiencing a **13% increase** in visits since 2008.

In addition, NSW's national parks receive an estimated 3 million international visitors each year.

According to the Destination NSW 'Nature Based Tourism to NSW' factsheet for the year ended December 2012:

- NSW received over 19.9 million international and domestic nature based visitors - up by 3.1% on the year ended December 2011.

Length of stay

- Visitors spent 94.7 million nights in the state - **up by 2.6%** on the year ended December 2011.
- Domestic nature based visitors stayed, on average, 4.2 nights in NSW. This was **longer than the average** for all visitors to the State (3.4 nights).
- International nature based visitors stayed an average of 25.9 nights in NSW. This was **longer than the average** for all visitors to the State (23.6 nights).

Spend

- Nature based visitors spent an estimated \$12.7 billion (including package expenditure by overseas visitors) in NSW - **up by 2.9%** on the year ended December 2011.
- Domestic overnight nature based visitors to NSW spent an estimated \$6.2 billion (including airfares and transport costs) during their trip - **up by 2.9%** on the year ended December 2011.
- International nature based visitors spent an estimated \$5.4 billion (including package expenditure) in NSW - **up by 0.2%** on the year ended December 2011.

1-2(a)(ii) Taronga Western Plains Zoo (TWPZ) visitation

TWPZ has over **220,000** visitors annually and has seen over **8 million** visitors pass through its gates over 36 years of operation.

Over **11,500** visitors undertook overnight programs within the zoo in the 2012 year.

TWPZ ensures that the region benefits from significant intra- and inter- state visitation with around **89%** of visitors from outside the local regional area including **26%** from the Sydney Metropolitan area during 2012.

1-2(a)(iii) Australian Botanic Garden Mount Annan visitation

The Australian Botanic Garden is the largest tourist attraction in the Macarthur region. With entry fees abolished in April 2011 by the NSW Government and initiatives such as a new mountain bike trail and a prominent new entrance on Narellan Road, the Garden has experienced a major increase in visitation over the past two years, with further increases expected.

Visitation has increased from approximately **116,168** visitors in the 2010/2011 financial year to **325,251** in the 2011/2012 financial year (approximately 180% increase).

An internationally significant scientific facility on site, the Australian PlantBank, will open in October 2013.

1-2(a)(iv) *Blue Mountains Botanic Garden Mount Tomah visitation*

The Blue Mountains Botanic Garden is a vital tourist attraction on the Bells Line of Road area of the northern Blue Mountains. While many tourists visit Katoomba, the Three Sisters and the other well known attractions on the southern side of the Grose Valley, the Blue Mountains Botanic Garden is the largest tourist attraction on the northern side of the mountains and is an important historical site.

With entry fees abolished in April 2011 by the NSW Government, visitation to the Blue Mountains Botanic Garden has increased on average by **50%** with the busiest spring and autumn months seeing a **150% increase** in visitation.

Visitation for 2011-2012 financial year was 128,645 compared with 75,044 in 2010-2011, a **70% increase**.

At least 12% of visitors are international tourists (over 12,500 people this financial year) with just under a quarter being regional or interstate tourists.

1-2(b) *Economic contribution to tourism*

1-2(b)(i) *Economic contribution of national parks**

National parks have a range of economic impacts and benefits for neighbours, local government and the broader regional economy.

Since the mid-1990s NPWS has commissioned a series of expert economic assessments to estimate the direct and flow-on impacts on local economies and other aspects of the economic value of national parks. More recently the scope of this research has been widened to consider the impacts of national parks in several broad regions of NSW.

Key findings are summarised in the following table. These consistently demonstrate the important contribution that national parks make to regional economies through park management expenditure and visitor expenditure.

Summary of key economic contributions of the national parks system, by region	Annual contribution of NPWS expenditure to regional value-added activity	Annual contribution of park visitor expenditure to regional value-added activity	Equivalent jobs generated in the region
North East	\$17.00 m	\$107.0 m	1915
Far South Coast	\$8.00 m	\$54.0 m	921
Far West	\$6.25 m	\$6.1 m	203
Wheat Sheep Belt	\$7.50 m	\$8.8 m	295

* Sourced from the NSW Government Submission to the Inquiry into management of public land in NSW, August 2012

1-2(b)(ii) *Commercial tour operators in national parks*

NSW's national parks have an important role to play by attracting people to regional NSW and encouraging them to stay longer. They also make a valuable economic contribution through the experiences delivered on park by commercial tour operators:

- Over **180 businesses** hold long-term licenses to deliver tours in NSW protected areas.

- Close to **70%** of these businesses are based outside the Sydney basin, and provide strong employment prospects for regional NSW communities.
- Over **200,000 people** per year visit a national park or reserve on a booked tour.
- More than **65%** of these on average over the last three years visited a park outside Sydney.

Parks of particular popularity include:

- Worimi Conservation Lands (incorporating Worimi National Park, Worimi State Conservation Area and Worimi Regional Park);
- Kosciuszko National Park;
- Cape Byron State Conservation Area;
- Mungo National Park; and
- Myall Lakes National Park.

NPWS is committed to promoting opportunities for licensed businesses and is particularly active in this area. All licensed businesses are profiled on the OEH website and are invited to participate in campaigns and events that relate to their businesses, for example the annual Wild About Whales and Two Wheeled Treks campaigns.

1-2(b)(iii) *Improved systems for booking of park accommodation and experiences*

In May 2012, NPWS launched a new visitor website for NSW National Parks, incorporating a new online booking system for a selection of park campgrounds and holiday properties, to supplement NPWS's face-to-face and phone booking services and provide tourists and visitors with a more efficient and effective process for researching, planning and booking their trip.

Since launching in May 2012:

- Over **24,000 bookings** for more than **84,000 room nights** have been made in the system across **73 locations** around the state.
- In total, the revenue from these bookings is more than **\$5.3 million**.

Online booking has also proved popular with national park tour and event bookings, for example:

- **93%** of tickets for New Year's Eve 2012 in Sydney Harbour National Park were sold online.

Online booking technology provides NPWS with real time revenue and occupancy reporting, and enables better measurement of demand and occupancy, while providing strong visitor insights, all contributing to an improved service for NSW national parks visitors.

1-2(b)(iv) *Events and festivals in national parks*

NPWS delivers a range of events across NSW from large significant major events to smaller community events in both metropolitan and regional areas.

Events and festivals on park achieve a range of objectives, including raising awareness of conservation values; promoting the facilities and recreational opportunities in NSW's national parks; growing visitation to regional and local areas, including during the low season; boosting local economies through visitation and tourism; and supporting local business, including commercial operations on park; and encouraging community engagement.

Addendum

Over the 2013 calendar year, NPWS is delivering more than **70 on-park public events** across the state, with additional events booked into the calendar as opportunities arise. Events include:

- NSW Major Events;
- Community events;
- Cultural and arts events; and
- Sporting events.

NPWS' contribution to NSW Major Events include key public activities for Sydney's annual New Year's Eve festivities and the 2013 International Fleet Review. New Year's Eve annually attracts around **7,000 visitors** and tourists to the ticketed harbourside parks and islands of Sydney Harbour National Park, and **several thousand more** to the park's free locations, providing a significant contribution to the estimated **\$156 million*** that the fireworks generate for the local economy.*

In November 2014, NPWS will co-host with Parks Australia, the International Union for Conservation of Nature's World Parks Congress, a global forum on conservation and protection of the world's most valuable places. The Congress is held only once every 10 years and will provide a significant boost to Sydney's tourism, with more than **3,000 visitors** expected to attend the event over 8 days and a value to the NSW economy estimated at around **\$25 million**.

* Statistic from Events NSW

1-2(b)(v) *Economic contribution of Taronga Western Plains Zoo to regional tourism*

- The TWPZ recurrent operating Budget is almost entirely spent locally within Dubbo and Central NSW accounting for approximately **\$12.5 million** contribution (excluding depreciation).
- Leisure Tourism Spend within the Dubbo LGA is **\$175 million** (Source; 2007 – 2011, *National Visitor Survey, DNSW Four year average combined day and overnight visitation, Dubbo LGA Profile*).
- **70%** of Leisure Tourists visiting Dubbo are motivated by a trip to Taronga Western Plains Zoo (Source: *National Visitor Survey, Tourism Australia Dubbo LGA Visitor Profile*).
- **78%** of Leisure Tourists that visit Dubbo patronise the zoo (Source: *National Visitor Survey, Tourism Australia Dubbo LGA Visitor Profile*).
- As at December 2012, the Central New South Wales Visitor Economy was estimated at **\$1,136,000,000** in annual value (Source; *National Visitor Survey – Tourism Australia*).

1-2(b)(vi) *Economic contribution of Australian Botanic Garden Mount Annan to regional tourism*

- The Garden works closely with Macarthur Tourism (collaboration between Camden and Campbelltown Councils) and other tourism operators in the promotion of the Garden and region.
- The Garden hosts a number of signature events which are highlights of the Macarthur region's event calendar. These include the *AnnanROMA Food and Wine Festival*, which aims to promote Macarthur as a destination for great food, wine and produce by showcasing local suppliers. Gate admission (when an entry booth was in place) indicated that approximately

20% of visitors are from outside of the region. The event attracted 7,000 people in 2013. The annual Carols event attracts around 8,000 visitors.

- The Garden promotes other tourism products within the region and can offer packages with other attractions to promote day and weekend visits to the region. Annually, representatives from the Garden participate in the Australian Tourism Exchange expo to encourage international tour groups to visit the Garden and the region, as well as expand networking opportunities within and beyond the region.
- Tourism education has been encouraged by the Garden with the Marketing and Visitor Services section regularly hosting tourism students for periods of work placement to provide the opportunity for students to learn about the industry and operations of a tourism attraction such as the Garden.
- The Garden hosts a number of sporting and recreational events including a popular annual 24 hour mountain bike race which attracted more than 500 participants and many more spectators to the last event in 2012. This included participants from outside of the region and state, resulting in additional visitor nights locally.
- The Garden wedding ceremonies and receptions also attracts additional visitor nights to the region. The Garden promotes local accommodation and wedding suppliers to wedding clients.
- Free volunteer guided tours are offered most days of the week. The number of these tours being delivered has increased significantly over the past year. The Garden also offers a number of paid tour options to coach groups and tour companies. A new tour of the Australian PlantBank was launched at this year's Australian Tourism Exchange Expo in Sydney.

3. Impacts of tourism on Local Government Areas, including:

- (a) infrastructure services provision and asset management**
- (b) social impacts**
- (c) unregulated tourism**
- (d) employment opportunities**

3(a) Infrastructure services provision and asset management

3(a)(i) *NPWS infrastructure and investment*

NPWS manages more than 9% of NSW across over **880 parks and reserves**. These parks provide a wide range of opportunities for the community and visitors to NSW to enjoy a nature or cultural heritage experience.

NSW's national parks are supported by significant investment in facilities to support community access and sustainable visitor use. This investment can include maintaining or upgrading roads and bridges, adaptive re-use of heritage properties, providing new picnic and camping areas, visitor amenities, walking and cycling tracks, and signage.

The national parks system contains more than **41,000 km of roads**, over **650 lookouts and viewing platforms**, and in excess of **470 campgrounds**. The condition of all assets and their maintenance requirements are tracked through the NPWS Asset Management System.

In both the establishment phase of new parks and in the on-going management of national parks, NPWS preferences sourcing the supply of goods and services from local businesses.

3(a)(ii) *NPWS commercial leases for visitor facilities*

NPWS manages a portfolio of **over 400 leases** for visitor facilities and a further **800 sub-leases** relating to the alpine resorts. Revenue from commercial leases totalled more than **\$14 million** in 2011/12, an **increase of 30%** from 2007/08.

These leases include a wide range of visitor facilities across the state, from outstanding heritage accommodation such as Q Station Resort in Manly through to restaurants, cafes, marinas and tourist parks such as Murramurrang Resort on the NSW South Coast.

3(a)(iii) *NPWS strategic tourism planning and priorities*

NPWS has a dedicated team of tourism, experience development and marketing specialists that works in collaboration with Destination NSW, regional tourism organisations, local government and a range of other stakeholders for the development of innovative nature-based tourism and recreation opportunities and partnerships.

NPWS is working closely with state and national tourism and parks agencies to effectively contribute to the *NSW 2021* goal to increase tourism in NSW, with double the overnight tourism expenditure by 2020.

OEH/NPWS is also the lead agency on four actions in the NSW Visitor Economy Industry Action Plan, including:

- Action 29C to identify and facilitate opportunities for commercial and strategic tourism partnerships and participation in National Parks, historic sites and other relevant State-operated Reserves and implement a plan to realise these opportunities;
- Action 29D to ensure that NPWS's role and responsibilities are integrated into relevant Destination Management Plans;
- Action 29E to further develop and promote the Great Walks in NSW to enhance nature experiences; and
- Action 46C to increase Industry participation in commercial partnerships to undertake innovative and adaptive re-use of heritage properties and for visitor facilitation in National Parks and visitor accommodation and attraction purposes, therefore gaining greater utilisation of heritage and natural assets.

NPWS has successfully delivered a three-year *Sustainable Tourism Action Plan*, providing a strategic approach to the identification and prioritisation of new visitor experiences, allocation of resources, marketing and development of partnerships.

Case studies:

- **National Landscapes**

The Visitor Economy Taskforce Final Report recommends the incorporation of National Landscapes and World Heritage Areas within NSW into the relevant Destination Management Plan to better leverage these experiences and help grow visitation and spend.

In addition to working closely with Destination NSW and regional tourism organisations to ensure NSW's national parks and nature-based tourism experiences feature appropriately in destination management planning, NPWS has adopted **NSW's five National Landscapes** – each of which incorporate significant stretches of national parks estate – as a framework for planning and prioritising tourism strategy and experience development, as well as marketing, for the agency.

The National Landscapes program is a partnership between conservation and nature and seeks to promote Australia's superlative natural landscapes. The five National Landscapes in NSW include:

- Sydney Harbour;
- Greater Blue Mountains;
- Australian Alps (cross-tenure with Victoria);
- Australia's Coastal Wilderness (cross-tenure with Victoria); and
- Australia's Green Cauldron (cross-tenure with Queensland).

NPWS plays an active role in each of the National Landscapes Committees, which include a range of stakeholders, including local tourism operators, community representatives, local councils and land managers, and provide a clear mandate to promote the development of tourism opportunities in local communities.

Each National Landscape is required to have an Experience Development Strategy (EDS) for the identification and local delivery – in collaboration between public and private enterprise – of new experiences and packaging opportunities to drive destination appeal and increase tourism to the regions within the Landscape. EDS's have been developed for the Australian Alps, Australia's Coastal Wilderness, and Australia's Green Cauldron, and are currently in development for Sydney Harbour and Greater Blue Mountains.

- **River Red Gums Nature Tourism Action Plan**

In 2012, the River Red Gums Nature Tourism Action Plan was launched for the region, a significant achievement following extensive consultation with local government, regional tourism stakeholders and the communities of the Riverina.

The plan provides a comprehensive, landscape-scale approach that identifies a range of opportunities for people to access and enjoy the magnificent forests, rivers and wetlands of the area, in collaboration with communities, local government and tourism operators. It also identifies marketing and promotional activities to attract more visitors to the region and increase awareness of the reserves and the range of experiences on offer.

In 2012/13, the Government will deliver over **\$2 million** in funding for visitor experiences, facilities and services in the region, including:

- Revitalisation of picnic grounds, boat access areas, visitor facilities, car parking, campgrounds and walking tracks within each of the visitor nodes; and
 - Development and enhancement of visitor experiences, including bird hides, walking and cycling tracks, signage and digital interpretation.
- **Toorale and Gundabooka Nature Tourism Action Plan**

In 2012, NPWS delivered the Toorale and Gundabooka Nature Tourism Action Plan, which sets out actions to develop and enhance visitation to the Toorale and Gundabooka national parks and state conservation areas. Implementation of the plan is well underway, with consultation, site planning and comprehensive cultural site surveys now complete.

Completion of stage 1 works at Toorale National Park and State Conservation Area, including Mt Talolwa Lookout and Darling River Drive is expected in the second half of 2013.

Integration of this development into the broader regional tourism context is also well progressed with NPWS working with existing and potential commercial tour operators and local tourism operators. A commercial tour operator is now licensed to operate in Toorale National Park and State Conservation Area.

- **Clarence Coast Experience Development**

NPWS has been instrumental in developing a destination development program for Wooli and Minnie Waters in the Clarence Coast region of northern NSW. Currently under implementation, the program has identified the gaps and opportunities to increase the appeal of the destination for visitors and to generate sustainable employment through stimulated growth in the local tourism industry.

The program comprises marketing and product development initiatives to be delivered under a partnership arrangement between NPWS and Clarence River Tourism, and formalised under a Memorandum of Understanding.

A total of **\$150,000** in partnership funding has been provided for the development of initiatives identified during the experience development process, and for implementation of activities detailed in the promotions plan. A community working group meets monthly and is undertaking a project to create a mangrove nature walk featuring outdoor sculptures along the Wooli River.

- **Revitalisation of lighthouses**

Action 46C of the Visitor Economy Industry Action Plan seeks to increase industry participation in commercial partnerships to undertake innovative and adaptive re-use of heritage properties and for visitor facilitation in National Parks and visitor accommodation and attraction purposes. NPWS manages a range of heritage properties across the national park system that have been restored for this purpose, including the buildings in historic lighthouse precincts along the NSW coastline.

NPWS manages ten historic lighthouses in NSW. While the operation of the lighthouse lamps is managed by NSW Waterways and the Australian Maritime Safety Authority, NPWS is responsible for the conservation and tourism management of these special monuments and their precincts. In five of these precincts, the heritage lighthouse keeper's cottages have been carefully restored for adaptive re-use as unique holiday

accommodations on park. Each is managed either by NPWS or on the agency's behalf under contract by a private operator.

Managed under contract by private operator

- Green Cape Lighthouse Keepers Cottages, Ben Boyd National Park
- Sugarloaf Point Lighthouse keepers cottages, Myall Lakes National Park
- Smoky Cape Lighthouse keepers cottages

Managed by NPWS

- Montague Island Lighthouse Keepers Cottages, Montague Island Nature Reserve – Managed by NPWS
- Byron Bay Lighthouse Keepers Cottages – Cape Byron State Conservation Area

3(a)(iii) NPWS Visitors Centres

NPWS operates Visitor Centres across NSW with locations including some of the premier nature based attractions in the state. In addition to hosting visitors to the site NPWS Visitor Centres also provide comprehensive tourist information for the region working in collaboration with the region's level 1 accredited Visitor Centre.

3(a)(iv) Taronga Western Plains Zoo

Ongoing investment in tourism facilities and new product development, such as approximately **\$6.5 million** in unique overnight accommodation based experiences within the next twelve months, including the opening of Billabong Camp in April 2013.

Participation in NSW Government Tourism Product Development Program leveraging a **\$100,000** grant ten times toward the overall \$1million development of Billabong Camp.

Participation in the Destination NSW Cooperative Marketing Program through Inland NSW Tourism matching funding of **\$120,000** in NSW Government support to extend reach of marketing and advertising programs and contribute to two successive years of positive growth in visitation.

Investment in Strategic Partners such as Qantaslink, and the creation of a unique Taronga Western Plains Zoo branded Q400 Aircraft promoting Dubbo as a regional destination nationally.

3(b) Social impacts

NSW's national parks offer an extraordinary diversity of experiences for visitors and tourists, from simple enjoyment and relaxation in beautiful places to immersive nature and cultural ecotourism opportunities to challenging physical outdoor activities – all of which contribute not only to critical economic outcomes for the state, but to a vital connection between people, communities and nature.

3(b)(i) Community health and wellbeing

Research shows that being in nature plays a vital role in health and wellbeing. Contact with nature has also been shown to boost immunity, enhance concentration and productivity, and promote healing, while having positive effects on blood pressure, cholesterol and mental wellbeing*.

Addendum

For children, nature engagement and play can help with cognitive development and aid in the prevention of issues that are on the rise, such as childhood obesity, attention disorders and depression.[^]

National parks and reserves offer a critical setting for the promotion of healthy lifestyles and wellbeing. They also help to build strong local communities by providing natural spaces for gathering and by providing opportunities for groups to work together to look after their local environment.

NPWS supports a wide range of community groups around the state, with many parks having dedicated local volunteer groups engaging in a range of activities from bush regeneration and heritage conservation to tour guiding to track maintenance. Examples include the Friends of Yanga, Friends of Roto House, Friends of Minnamurra and Friends of Sea Acres, as well as the Byron Bay lighthouse volunteers who service more than 100,000 visitors each year, and the Chase Alive volunteers at Barrenjoey lighthouse and Kalkari Visitor Centre in Ku-ring-gai Chase National Park.

* Healthy parks, healthy people - The health benefits of contact with nature in a park context. Deakin University, March 2008

[^] Last Child in the Woods, 2010, Richard Louv

3(b)(ii) NPWS Discovery and WilderQuest Programs

The NPWS Discovery program offers Ranger-guided tours in national parks targeted at domestic leisure and international tourism markets. In 2011/12, more than **310,000 people** experienced national parks on a guided tour, an **increase of over 173,000** visitors in just four years. The program also includes a significant curriculum-based educational component that has also seen year-on-year growth, attracting around **96,000 school students** in 2011/12.

Programs range from WilderQuest activities for young children, to Aboriginal cultural heritage tours and seasonal activities that support NPWS' annual campaigns such as Wild About Whales and Two Wheeled Treks (a program encouraging cycling and mountain biking in parks). Also popular among tourists are NPWS historic sites, such as forts, lighthouses, gaols, houses, caves and some larger historic precincts.

Guided tours operate in many NSW national parks, increasing visitation to and offering opportunities for people to access nature in regional, rural and coastal communities. By engaging volunteers to contribute to visitor experiences and land management projects, NPWS is enabling the community to actively participate in conserving their local environment.

In 2012, NPWS launched WilderQuest, a pioneering, multi-award award-winning program designed to motivate and encourage children to discover the natural world through a combination of digital and real-life nature experiences, at home, in nature, and in the classroom.

The WilderQuest program includes a website, an iPad app, a guided on-park tour program, and an education component. The WilderQuest tours, run in national parks during school holidays, help to create an important link between the virtual and the real, and make nature experiences and recreation an easy choice for families, as well as encouraging visitation and length of stay in regional NSW.

The WilderQuest iPad app has:

- been **downloaded more than 26,000 times** since launch;
- has a **4.5/5 star rating**;
- was named Apple **iPad app of the Week**, and

- ranked at **number 1 in the education category** for iPad apps in Australia in its launch week.

The app has gone on to win multiple awards, such as Best Tablet Marketing at the Interactive Advertising Bureau of Australia Awards in July 2012; and six awards at the AIMIA Digital Industry Association for Australia Awards in March 2013, including Best Tourism and Travel, Best Learning and Education, Best Children's and Best of the Best.

3(b)(iii) *National parks volunteering*

Volunteers make a significant social and environmental contribution to society and local communities. In 2011/12, more than **6,800 volunteers** contributed more than **130,000 volunteer hours** to NSW's national parks and NPWS is on track to increase this number to **7,500 by 2016** in line with NSW 2021 targets.

OEH develops policies and programs that build on volunteering as an important partnership approach and NPWS is working hard to provide opportunities that build strong relationships with local communities, and engage more people with parks and their conservation. Volunteering activities span a range of park programs, from tourism and recreation such as campground hosting and tour guiding, to voluntourism, community education, environmental and natural resource management, science and cultural heritage.

Voluntourism is a niche but growing tourism market for park-based volunteer programs. NPWS has been delivering a range of short-term volunteer holiday projects in NSW's national parks, in partnership with not-for-profit and private sector organisations. One example is the award-winning Conservation Volunteers Australia Naturewise program at Montague Island Nature Reserve on the far south coast, a unique eco tour offering volunteers the chance to stay in heritage accommodation and assist in the monitoring and protection of the island's wildlife.

NSW National Park volunteers are also offering guided tours, information and assistance to visitors and tourists at some of the state's most iconic locations, such as Byron Bay, where a team of community volunteers dedicate their time to sharing the stories of the Cape Byron precinct and Australia's most easterly lighthouse with more than 100,000 tourists every year.

3(b)(iv) *Taronga Western Plains Zoo*

- TWPZ provides volunteering opportunities for 77 adult volunteers and 30 Youth At The Zoo (YATZ) volunteers, representing over 6,000 hours year to date this financial year.
- TWPZ is an accredited provider for Community Service placement through the Department of Correctional Services NSW and has provided over 2,915 hours of work placement year to date this financial year.
- TWPZ has provided opportunities for four identified Aboriginal Discovery Hosts in the current year providing work opportunities in frontline tourism services delivery.

3(c) *Unregulated tourism*

Commercial tour operators play a key role in facilitating public use and enjoyment of NSW's national parks and reserves, by promoting their unique values and encouraging tourism, recreation and length of stay in regional NSW.

NPWS licenses commercial tour operators who offer guided tours, instructional or educational courses and other leisure activities in NSW parks and reserves through the Parks Eco Pass licensing system. The program was introduced in 2009 to ensure high operating standards and ecologically sustainable and culturally appropriate tourism delivery in NSW's national parks. The program provides for monitoring and compliance of licensed operators. Over **180 businesses** currently hold long-term licenses.

The *National Parks and Wildlife Act 1974* also contains important checks and balances in leasing provisions, such as sustainability assessment criteria, to ensure that the natural and cultural values of the NSW park system are protected, and that the community has a say in what happens in their local park.

In many categories of parks, leases and licences for the adaptive reuse of existing buildings can be granted for sustainable visitor and tourist use and enjoyment. NPWS has a wide range of existing commercial arrangements for adaptive reuse and a number of new proposals are currently being progressed.

3(d) Employment opportunities

3(d)(i) Regional employment with NPWS

NPWS employs a wide range of people with diverse skills, from park management through to customer service. In total, over 70% of the total 2,000 people employed by NPWS are located in regional NSW, with around 94% of all positions being field-based. These positions directly contribute to local and regional economies while also undertaking important park management activities to maintain and present park facilities and services to encourage local communities and tourists to enjoy nature-based and cultural experiences throughout the state. This includes guided Discovery tours, maintaining walking tracks and picnic areas, and providing camping and other accommodation facilities.

Guided tours operate in many NSW national parks, increasing visitation to and creating employment opportunities in regional, rural and coastal communities. Guides are professional interpreters of natural and cultural heritage who often also provide training for local government authorities and other community partners wishing to offer guided tours off-park. By engaging volunteers to contribute to visitor experiences and land management projects, NPWS is enabling the community to actively participate in conserving their local environment.

3(d)(ii) Aboriginal employment

NPWS is party to 25 joint management arrangements covering approximately 1.5 million hectares or almost a quarter of the national parks system. There are over 200 Aboriginal people formally appointed to boards of management and committees to oversee the management of jointly managed parks, and over 100 Aboriginal staff members directly employed in management of these parks.

NPWS is a significant employer of Aboriginal Australians. There are over 200 jobs that are specifically reserved for Aboriginal people within NPWS, which account for around 10% of the NPWS workforce.

A series of successful NPWS programs seek to improve wellbeing in Aboriginal communities by supporting training and business opportunities, including:

- **NPWS indigenous cadetship program** – which supports individuals undertaking tertiary study. Since 2002, fifty three cadets have commenced with NPWS and 18 have been permanently appointed to positions in NPWS.

- **Indigenous traineeship program** – a work based training program for field officers and interpretive assistants. After a twelve month traineeship program, participants attain a formal qualification, the Certificate II in Conservation and Land Management. Since 2006, 41 indigenous trainees have completed the program, with 7 currently undertaking it. Twenty eight indigenous participants have gained further temporary or permanent employment with NPWS at the conclusion of the program.
- **Aboriginal Tour Guide Training program** – which has been developed by NPWS in collaboration with NSW TAFE. Since 2007 it has trained over 300 Aboriginal participants in 32 Aboriginal communities throughout NSW.

3(d)(ii) Taronga Western Plains Zoo

TWPZ is a significant local employer with 99 permanent staff and 180 casual staff (full time equivalent 120), and a retention rate of 95.1%.

4. Marketing and regulation of tourism

4(a) New visitor website for NSW National Parks

In developing new initiatives and experiences for nature-based recreation, NPWS is also re-shaping the way it communicates with tourists and visitors, with exciting and innovative new digital approaches to the promotion of NSW's natural and cultural heritage.

In May 2012, NPWS launched a new visitor website for NSW National Parks, delivering on a major Government commitment and providing visitors with significantly more content, simple-to-navigate functionality, and an inspirational look and feel. The new website integrates Google maps, social media, and an online booking system for more than 70 campgrounds and holiday accommodations in parks around NSW.

The website profiles more than **180 national parks and reserves** and **over 1000 park activities and attractions** around NSW. Further work is underway, with digital engagement and mobile strategies in development, along with further enhancement of mapping and park attractions content.

The website is experiencing significant growth in visitation month on month; in its first year it has already attracted **more than 1 million visitors** and increased exposure to accommodation facilities across regional NSW through the introduction of the online reservation system.

4(b) Cooperative campaigns to drive regional tourism growth

4(b)(i) Wild About Whales

In 2010, NPWS launched *Wild About Whales*, a fully integrated marketing campaign that leverages the annual migration of humpback whales along the east coast of Australia to motivate visitation to NSW coastal parks over the cooler months, while growing support for conservation.

A key objective of the campaign involves working in partnership with regional and local tourism organisations to deliver coastal nature-based experiences that encourage visitation and longer stays in regional NSW in the low and shoulder seasons. This directly supports the Government's

NSW 2021 target of increasing tourism in NSW with double the overnight visitor expenditure by 2020.

Wild About Whales has a dedicated website including information on whales and marine wildlife, NSW national parks and key destinations along the coast for whale watching and coastal activities. It also offers a smartphone application offering a mobile version of the website as well as the opportunity for visitors to log their whale sightings on a map.

The campaign has a large and highly engaged social media community of around **10,500 people** through Facebook and Twitter, delivering a potential reach of **over 1.5 million**.

The campaign is supported by media/PR activities, outdoor, print and online advertising, social media strategies, tourism industry partnerships, point-of-sale materials and dedicated campaign e-newsletters.

4(b)(ii) *Outback campaign*

In 2011 and 2012, NPWS partnered with Destination NSW and Inland NSW Tourism to deliver a digital marketing campaign promoting Outback NSW, and in particular the nature-based experiences of the national parks in western NSW. The campaign also aims to support the local tourism industry by promoting national park tour operators and other local businesses to help drive economic growth.

As part of the campaign, NPWS and Destination NSW have hosted dedicated Outback NSW campaign pages, offering information on parks, accommodation and camping, itineraries and drives, and packages provided by tour operators in the region. In 2012, the campaign delivered strong results in the digital space, exceeding targets for website visitation, digital advertising and contact acquisition, including driving **a 20% increase** in traffic to the NPWS visitor website from the Destination NSW website and generating around **8,200 leads to operators**. The 2013 campaign is currently in market.

4(c) Regulation of tourism in national parks

One of the objectives of the *National Parks and Wildlife Act 1974* (NPW Act) is to facilitate opportunities for people to appreciate and enjoy NSW's national parks, and foster a life-long connection with the environment and support for conservation. Over recent years, NPWS has been working closely with government, private sector and community based organisations to support this intent through the development of new tourism and recreation experiences that showcase the State's outstanding nature and heritage.

In October 2010, the *National Parks and Wildlife Amendment (Visitors and Tourists) Act 2010* commenced. The legislation strikes a balance between connecting people to nature, and the ongoing conservation of natural and cultural park values. It created a single, simple provision that clearly sets out the purposes for which leases and licences can be granted on park. It also sets high environmental standards for leases and licences with the inclusion of the requirement that the Minister must be satisfied of particular sustainability factors and take into account sustainability criteria before granting any lease or licence.

In addition to considerations under the NPW Act, heritage and environmental impacts are considered in accordance with the *Environmental Planning and Assessment Act 1979* and the *Heritage Act 1977* when new opportunities are proposed in parks.

Delivering tourism opportunities in NSW's national parks is also carefully managed through branch and regional operations plans and park plans of management, which set the framework for how individual parks are to be managed into the future, with consideration to the specific

values of a protected area and a positive, sustainable approach to tourism and visitation within that context. Plans of management are prepared in consultation with Regional Advisory Committees and the National Parks and Wildlife Advisory Council and are publicly exhibited so local communities also have a say in how their parks are managed.

In addition, NPWS manages a licensing system for commercial tour operators delivering business on park. The Parks Eco Pass program recognises the invaluable role played by commercial tour operators, in partnership with NPWS, in promoting the State's parks and encouraging visitors to appreciate, understand and enjoy them. The program ensures a high level of operating standard and encourages ecologically sustainable and culturally appropriate tourism use. The program also encourages accreditation through relevant industry bodies to support improvements to performance, professionalism and standards by commercial tour operators.

5. Utilisation of special rate variations to support local tourism initiatives

Nil response.

6. Other related matters

6(a) Cultural tourism enterprise development

6(a)(i) *NPWS' Aboriginal Park Partnerships Funding Program*

This program supports partnership projects between Aboriginal communities and NPWS for park management, including Aboriginal co-management of parks. This may include projects that enhance relationships between NPWS and Aboriginal communities. The program's objectives for working in partnership with Aboriginal communities are to help ensure the following:

- Respect for Aboriginal culture;
- Supports Aboriginal people continuing their connection to their country and caring for their country;
- Supports Aboriginal people continuing and maintaining their culture;
- Supports Aboriginal people telling their stories to the wider community and promoting Aboriginal culture and reconciliation;
- Supports Aboriginal people's broader aspirations for economic, social and cultural development; and
- Contributes towards redressing dispossession and promoting Aboriginal wellbeing.

Through partnerships with NPWS, the program seeks to:

- Initiate and/or increase engagement with, listen to and talk to Aboriginal people to identify parks issues that Aboriginal people believe are important to them, and who may wish to be involved. This includes the development of protocols for ongoing and enhanced engagement on those issues;

- Increase Aboriginal people's participation in park management and areas of cultural significance in parks, thereby playing a more significant role in the decision making processes involved in park management, including plans of management;
- Provide for and enhance Aboriginal people's access to, and use of parks, particularly for cultural purposes and cultural activities;
- Facilitate and enhance the involvement of Aboriginal people in education and interpretation of parks, particularly in relation to Aboriginal heritage;
- Increase NPWS and Aboriginal communities' capacity to work in partnership;
- Work with Aboriginal communities to facilitate and develop individual and community capacity in conservation and land management, cultural heritage assessment and management, strategic policy and planning in relation to parks; and
- Help facilitate and support Aboriginal businesses and Aboriginal business development.

6(a)(ii) *Aboriginal Co-managed National Parks*

Aboriginal joint management involves the Government and local Aboriginal people sharing responsibility for a park's management, while maintaining access to parks for everyone. Through Aboriginal joint management of parks, Aboriginal communities have greater involvement in the custodianship and management of parks and Aboriginal people have access to parks to practise their culture. Joint management promotes parks as places where Aboriginal communities can pass on their culture to younger generations and connect with their Country. Joint management provides opportunities for Aboriginal communities to provide Aboriginal cultural interpretation to parks visitors either through education programs, such as the NPWS Aboriginal Discovery Program, or through Aboriginal cultural tourism.

Joint management arrangements currently cover around 1.6 million hectares, or a quarter of the parks system. These range from Mungo National Park and Mutawintji National Park in the far west, to Arakwal National Park and the Worimi Conservation land on the eastern seaboard.

There are now 26 Aboriginal joint management arrangements in place in NSW, including six Part 4A Aboriginal ownership and leaseback agreements under the *National Parks and Wildlife Act 1974*, four Indigenous Land Use Agreements under the *Native Title Act 1993* and 16 Memoranda of Understanding. Several new joint management agreements are currently being negotiated.

Aboriginal joint management of parks contributes to achieving goals under the NSW Government's ten year plan NSW 2021, the COAG Closing the Gap targets and the objectives of the National Partnership Agreement for Indigenous Economic Participation dealing with Aboriginal employment and training. In NSW 2021 the Government committed to 'Provide Aboriginal people with opportunities to protect their culture and heritage and to access traditional lands by increasing the number of Aboriginal joint management arrangements over national parks and other conservation areas' (Goal 26).

6(a)(iii) *Relationships with the NSWALC and Local Aboriginal Land Councils*

As the State's peak representative body in Aboriginal affairs, the New South Wales Aboriginal Land Council (NSWALC) aims to protect the interests and further the aspirations of its members and the broader Aboriginal community. The New South Wales Aboriginal Land Council is committed to ensuring a better future for Aboriginal people by working for the return of culturally significant and economically viable land, pursuing cultural, social and economic independence for its people and being politically pro-active and voicing the position of Aboriginal people on issues that affect them. NSWALC has the mandate to provide for the development of land rights for Aboriginal people in NSW, in conjunction with a network of 121 Local Aboriginal Land Councils through:

- Land acquisition either by land claim or purchase;

Addendum

- Establishment of commercial enterprises and community benefit schemes to create a sustainable economic base for Aboriginal communities;
- Maintenance and enhancement of Aboriginal culture, identity and heritage (including the management of traditional sites and cultural materials within NSW); and
- NSWALC also acts as an advisor to, and negotiates with, Governments, and other stakeholders, to ensure the preservation of Aboriginal land rights.

NPWS, through working more closely with both NSWALC and relevant Local Aboriginal Land Councils can create greater economic and employment opportunities for Aboriginal communities who are either part of a Co-Management arrangement and/or significant stakeholders of land close to/or adjacent to a National Park.