

Planning Workshop 1 - Strategic Planning of Wildlife Tourism

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Introduction

This workshop explored the idea of developing a national strategic approach to wildlife tourism. Panel members gave short presentations representing various perspectives. The way forward was then discussed by the all workshop participants.

1. The need and way forward for strategic planning of wildlife tourism in Australia

Dr Karen Higginbottom, Wildlife Tourism Australia/ Wildlife Tourism International (Consultancy), Sustainable Tourism CRC

Why strategic planning?

- Wildlife tourism is important economically (especially in regional areas) and in terms of potential positive and negative impacts on wildlife.
- Even when not the primary focus of tourism, wildlife can be useful in the marketing image to attract customers
- There are many issues that are specific to wildlife tourism (rather than generic to nature tourism)
- There are many issues limiting achievement of net benefits from wildlife tourism
- The wildlife tourism industry has been fragmented with little communication and coordination; now partially (but not sufficiently) addressed by Wildlife Tourism Australia)
- A common goal that encompasses perspectives of key stakeholders (enhanced TBL sustainability and benefits to economy/businesses, wildlife, visitors and community)

Existing initiatives with elements of strategic planning:

Who?

1. STCRC (and some govt) research
2. DITR tourism and conservation initiative
3. Tasmanian wildlife tourism strategy
4. WTA

Achievements

1. Identify and organise stakeholders (STCRC, WTA, Tas WT strategy)
2. Mission (Enhance TBL sustainability of wt and maximise its benefits for visitors, wildlife and habitats, tourism-related businesses and host communities)
3. Analyse (STCRC research, WTA consultation, Tas WT strategy)
4. Plan and implement (WTA, Tas WT strategy) – WTA significant progress re policy development and input, coop marketing initiatives and website advertising, information resources etc. but severely limited by lack of human/ financial resources.

Where to from here?

Do workshop participants think we should pursue development of a national wildlife tourism strategy?

If so, who should lead? (WTA, government, joint)

Needs:

- Joint vision
- Commitment and support from key stakeholders
- Resourcing

2. Department of Environment and Conservation, WA Perspective

Colin Ingram

From a DEC (protected area perspective) there are four areas that we think a strategic plan should address.

(1) LEADERSHIP

- Role of WTA
- Communication with the industry and government
- Industry development – building capacity (training)
- Lobbying/promotion, awareness of WT
- Set goals and objectives for WT (role of conference)
- Coordinate other strategic initiatives
 - ie*
 - improving environmental sustainability – economic and social
 - industry development and coordination
 - coordinating ideas for research
 - policy

(2) IMPACTS

- On WT (fishing, mining, pest species, habitat destruction) and by WT
- Industry taking greater responsibility for its own impacts (social and environmental)
- Education of operators by WTA and PAA
- Education of visitors by operators
- Information to operators by WTA and PAA
- Information to visitors by operators
- Accreditation – improving environmental performance
- Providing data to PAA and other managers about their activities
- Improving the quality of interpretation

(3) INDUSTRY STRENGTH, SOLIDARITY AND SUPPORT (3 S's)

- Building industry capacity – better organised
- Improving coordination – across government and within the industry
- Building WTA membership
- Improved channels of communication
- STO support/ PAM support
- Organise input

(4) RESEARCH

- Markets and marketing – valuing our wildlife (undervalued)
- Product development – increasing competition
- Fundamental research - Wildlife – licensing – minimise impacts

3. Tourism Tasmania perspective

Dr Claire Ellis, Director Destination Development, Tourism Tasmania

Tourism Tasmania undertook its wildlife tourism strategy in 2004-5 and it showed us that wildlife is not a key trigger for visitors to come to the State. Nature is a strong trigger and wildlife is a value add in the natural experiences. Nature is a core component of our Brand and wildlife is a part of this.

Our strategy at State level was a joint effort from PWS and Tourism Tasmania (part of the same Dept in Tas) and the actions listed from the strategy were only specific to these two agencies and not all stakeholders in wildlife tourism.

What is undertaken at national level needs to be considered carefully. A national strategy for WTA and a national wildlife tourism strategy may not be the same.

There are many important and well resourced and aligned players in various aspects of wildlife tourism already. The role of WTA is not to do all aspects but maybe facilitate the work of other players as appropriate for the topic.

The scope of a national strategy needs to be carefully considered as:

- the diversity and scope means it may require substantial stakeholder engagement
- an under-resourced strategy won't be worth it as it is not likely to gain acceptance or stewardship from others.
- achievement of outcomes from a strategy is critical.

Overall - while strategic planning is critical - we need to be careful to ensure there is support from all levels and stakeholders for a national wildlife tourism strategy.

4. Tourism Australia perspective

Susana Heraud, Tourism Australia

SOME BACKGROUND INFORMATION

Marketing Strategy and Development of New Campaign

During the course of developing the new campaign, extensive global consumer research to define and understand the target audience (Experience Seekers) and brand proposition, and to test the creative concepts was conducted in Australia's key tourism markets (US, UK, China, Germany, Japan and Australia)

So who is the Experience Seeker?

Experience Seeker is a mindset all of its own that stretches well beyond nationality, holiday behaviour and well beyond the category of travel....

They are open to new experiences to learn more about themselves

As a result they are....

- More open minded
- More inquisitive
- More progressive (in values, etc)
- Less materialistic
- More active on their holidays

They are...

- Better educated
- More driven as people
- Place great emphasis on personal development
- Marketing/advertising savvy

Snapshot of the *Experience Seeker* needs

Functional: contrast, learning experiences, opportunities for involvement (environment, people and culture), insights into the everyday

Economic: looks for good value, always looking to extend their stay, save money to pay for access to experiences

Social: deeper, more complex, wanting to develop personally, questioning the established norms, looking to stand out from the crowd.

Emotive: holidays are balanced, they are both important for their personal needs and for their partner/friend

Cultural: curious about the world, different to the rest – a more complex person

The research showed that although there is a high awareness of Australia as a tourism destination, there is the need to refresh the brand.

Amongst short haul Experience Seekers (Australia / New Zealand / Singapore),

Australia is perceived as:

- Having less value
- Having less status
- Safe and predictable
- Expensive – no value for money
- Having low 'badge value'

Therefore, not compelling!

And Long Haul Experience Seekers (Asia / Japan / Europe / Americas / Middle East):

- Have a limited understanding of Australia beyond the basics of:
 - "big"; "deadly animals"; "Australians"; "sport" etc.
- Describe Australia in nouns not verbs
- Image of Australia is strong
- Knowledge of Australia is poor

Therefore Australia is not compelling enough!

There is the need to upgrade a holiday to/within Australia

- Create a stimulus to re-appraise Australia
- Communicate "World's Best" experiences

In Summary:

- Experience Seekers are actively looking for self-fulfillment and personal growth through new and different experiences.
- Australia's brand is currently perceived by the target audience as familiar and lacking in depth.

- There is a need for new news to bring about reappraisal of the destination.
- However, the Australian personality and character is globally well-defined and seen as a clear point of differentiation for the destination.

According to our target market – ‘the Experience Seeker’: Australia’s “badge value”/braggability factors are:

- Wild and ancient nature / culture, experienced in diverse and unspoiled landscapes and settings
- Accessed through adventurous, spiritual or rejuvenating experiences
- Served by an emerging hospitality style, inspired by fresh natural produce
- Hosted by free spirited and friendly people

From these, 7 Key Australian Experiences were determined as Australia’s core strengths: Aboriginal Culture, Outback, Nature, Food & Wine, Cities, Beach Culture and Journeys.

Nature in Australia “is demonstrated by Australians living amongst a beautiful contrast of red, green and blue ancient landscapes, distinctive plants and intriguing wildlife that cannot be found anywhere else in the world”.

Key messages:

Accessibility and Interaction.
Integration with the built environment.
Conservation and protection.

Wildlife is a key part of Nature and one of the main motivations for coming to Australia.

Tourism Australia sees wildlife as part of an integrated broader nature experience, except for a small niche that involves specialised wildlife tourism.

TOURISM AUSTRALIA’S CONTRIBUTION TO A WILDLIFE TOURISM STRATEGY

TA can provide accurate, up-to-date information on consumer behaviour and their expectations of nature and wildlife tourism in Australia from a Marketing perspective. TA can provide the umbrella for a coordinated approach and make sure that the marketing strategies respond to consumer demand.

Some examples of the tools that TA provides to industry are:

1. Ongoing Research and Statistics – to understand trends, needs, behaviour, etc. eg.
 - New questions have recently been added to the NVS and IVS on Nature: bird watching, wildlife viewing (passive vs active), marine parks, etc.
 - The new module will also evaluate incidence, importance and motivation of consumers to undertake a nature-related activity.
2. How to sell Nature/Wildlife: what and how to communicate, key messages. Eg:
 - Learning component
 - Life-changing experiences
 - New-news, innovation
 - Best of the best

3. Appropriate imagery / photo shoots depicting Experiences, immersion in nature.

5. International Fund for Animal Welfare Perspective

Erica Martin

The International Fund for Animal Welfare (IFAW) welcomes the commitment to conservation as a key component of the WTA strategic planning process.

IFAW actively promotes the fact that animals are worth far more alive than dead and has spent many years working with industry and government to ensure responsible growth in wildlife tourism.

IFAW works with diverse organisations—from the Kenya Wildlife Service in Africa protecting animals in the tourist drawcard of Tsavo, to the Whale and Dolphin Watching Association here in Australia.

Conservation must be the cornerstone for successful wildlife tourism and Australia must set the bar as high as possible when setting best-practice conservation standards.

There must be a genuine commitment to research into impacts, both short and long-term and the courage to act as a result of that research.

Accreditation systems and levies will help to ensure that operators act responsibly and that funding will be available for future-proofing.

Enforcement is a key consideration and sometimes a difficult hurdle. Another key focus must be education.

There is not necessarily consistency in national and state regulations where they exist—a situation which must be rectified.

While it is important that we value the wildlife which makes this country unique we must be careful not to commodify it. We must remember that wildlife has intrinsic value of its own—a fact recognized by the Australian Animal Welfare Strategy.

IFAW looks forward to working with the wildlife tourism industry to ensure it is both successful and sustainable. We all share the responsibility to protect and nurture the resources that build the industry—the wildlife itself.

6. Way forward

(all participants, n=34, mostly government, research, NGOs, only 2 tourism operators)

There was debate as to the value and feasibility of developing a national strategy for wildlife tourism. Reasons raised for the idea were that:

- The national ecotourism strategy had a big influence on state and local government policies and actions
- A strategy can be used to create pressure for resources to implement, if strong stakeholder support
- National direction can feed through in positive way to states e.g. some aspects of legislation, foxes, whales

Reasons raised against the idea were that:

- The national ecotourism strategy caused little real change
- The national conservation strategy was disappointing
- Strategies can involve a lot of effort and resources but not actually do anything; it is better to use resources elsewhere to target a few critical issues

If such a strategy is to be developed, it should have the following features:

- be inclusive of a broad range of stakeholders, including operators, NGOs, government, host communities; involve building of alliances and 'friends'
- leadership from industry (WTA?) – to give "ownership"
- roles to include: communication within and between wildlife tourism stakeholders, education and interpretation/ guide quality, industry development, increasing uptake of accreditation, lobbying and promotion for wildlife tourism and wildlife, setting goals, coordinating initiatives, partnerships to deliver, tourism operators provide data for monitoring
- cover impacts on and by wildlife tourism
- include captive and non-captive (Tasmania experience showed value of this)
- learn from Tasmania WT strategy re demand, branding, product development, interpretation
- build industry strength and solidarity
- include research needs
- embrace Triple Bottom Line sustainability
- set the bar high for conservation, if it is to have conservation NGO support
- recognise both economic and intrinsic value of wildlife
- need for economic valuation of wildlife tourism at national level to support resourcing
- ensure wildlife tourism integrated with other forms of tourism
- should communicate to government re wildlife preservation (on private and public land) and support for protected areas
- include wildlife-centred, not just business-centred approach
- explore issues relating to better facilitating links between wildlife conservation and tourism on private land e.g. buffer zones of farmstays around national parks
- ensure it has bipartisan support in case of change of government
- well-resourced (NHT funding?)
- would require support of STOs, HOA protected area agencies

Conclusions:

- A working group should be convened to "obtain support and funding for a feasibility study to develop a national wildlife tourism strategy" (supported by 32 out of 34 workshop participants).
- The working group should be convened by WTA (Karen Higginbottom to organise), with other key participants being DITR, DEH
- The feasibility study should include examining: resourcing, extent of support from relevant organisations (need to start at national level), stakeholder roles, extent of common vision
- Consider surveying WTA members as part of exploring this further.