

WEST BELCONNEN INDIGENOUS TOURISM POTENTIAL

Report prepared for Riverview Projects (ACT) Pty Ltd

by



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Executive Summary

Riverview Projects (ACT) Pty Ltd is seeking advice on the potential of Indigenous tourism at the proposed new West Belconnen community development and associated Conservation Area in the ACT and NSW to:

- offer community and visitor opportunities to appreciate and enjoy the heritage values of the area
- create employment and/or business opportunities for the local Indigenous community
- deliver social and economic benefits to the local Indigenous community and the wider community.

Indigenous tourism is a competitive area. To develop viable Indigenous tourism enterprises, Indigenous individuals, groups or communities need to consider a range of factors that will contribute to business success – including location and access to markets, appeal to the right markets (including through filling a market gap), effective marketing, potential partnerships with other tourism products, building skills relevant to the product and business operation.

Currently, Indigenous tourism is a minor part of the ACT's tourism offer. However, there is an Indigenous experience profile in the ACT delivered through Indigenous displays and interpretation at national attractions, educational experiences at Birrigai, and a small number of Indigenous guided tours at Tidbinbilla Nature Reserve, Namadgi National Park and the Ginninderra area.

Demand for Indigenous tourism products in West Belconnen is most likely to come from:

- **local residents** in the increasing population of the ACT and surrounding region. Local residents are the main participants in the existing Indigenous tours at Tidbinbilla and Namadgi
- **some interstate overnight visitors** – the *Socially Aware* and *Visible Achiever* segments being targeted by VisitCanberra. They seek a range of experiences while in the ACT and a proportion will be potentially interested in nature and culture activities
- **the conference and business market** – seeking add-on excursions and team building activities. This market will be particularly relevant if there are conference facilities at or near West Belconnen
- **schools** – with an increasing population the demand for Indigenous cultural education (associated with environmental and outdoor education) may increase. There may also be some demand from the interstate school excursions which come to the ACT to visit national institutions.

The types of Indigenous tourism products with most chance of success at West Belconnen will:

- be attractive to the above markets
- have a point of difference from the current ACT Indigenous tourism offer
- fill a gap in the current ACT tourism offer
- be compatible with the West Belconnen location, facilities and uses.

An Indigenous-guided Murrumbidgee River Canoe Tour is suggested as a product that meets the above criteria. It would involve a guided canoe or kayak tour from Uriarra Crossing on the Murrumbidgee River downstream to near the Ginninderra Creek confluence. Indigenous interpretation and story-telling would occur en route with potential for a stop on the river bank for hand-on experiences of tools, food and culture.

It is recommended that a detailed assessment and business case is needed to assess the feasibility of a Murrumbidgee River Canoe Tour product at West Belconnen. Guidance for this assessment is provided by:

- description of significant factors about the product and its operation that need to be taken into account
- a preliminary analysis of market demand
- preliminary high-level assessment of potential development and operating costs
- a preliminary indication of potential income for the tour based on prices for guided canoe tours on the NSW South Coast and the Murray River.

It is also recommended that a model or models for the product content and price be tested with potential consumers to assess its appeal to markets as part of the product feasibility assessment and product development process

Other potential measures for participation of the Indigenous community in the West Belconnen Conservation Area are briefly identified. Opportunities might include involvement in management, contracts for development of Indigenous interpretation and signage, and employment as rangers, tour guides, administrative, service or maintenance staff or contractors.

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1 BACKGROUND

1.1 Purpose of the study

Riverview Projects (ACT) Pty Ltd is seeking advice on the potential of Indigenous tourism at the proposed new West Belconnen community development in the ACT and NSW to:

- offer community and visitor opportunities to appreciate and enjoy the heritage values of the area
- create employment and/or business opportunities for the local Indigenous community
- deliver social and economic benefits to the local Indigenous community and the wider community.

This study addresses the Indigenous tourism potential of West Belconnen through:

- an analysis of the context and future trends for general tourism and Indigenous tourism in the ACT (sections 2, 3 and 4). This provides a realistic assessment of potential future demand for Indigenous tourism. It includes an analysis of existing Indigenous tourism experiences in the ACT against which any future products at West Belconnen would be competing
- identification of criteria for potential Indigenous tourism/business opportunities at West Belconnen and proposal of an Indigenous canoe tour on the Murrumbidgee as a potential distinctive product that would meet these criteria (section 5)
- description of the potential Indigenous canoe tour and high level preliminary estimates of development and operating costs and income to guide a decision on whether to conduct a detailed feasibility assessment and business case for the product (section 6).

Indigenous tourism is part of a range of potential tourism and visitor opportunities and facilities being investigated for West Belconnen. A separate report on potential tourism facilities and opportunities at West Belconnen has been prepared by Taskforce Media¹.

1.2 The West Belconnen Project

Riverview Projects (ACT) Pty Ltd is the project manager for the planning and development of a new urban community development at West Belconnen, an area in the north west of the ACT and extending into NSW. The West Belconnen area extends west from the ACT suburbs of Holt and Macgregor to the Murrumbidgee River and north to the western portion of Ginninderra Creek in the vicinity of Ginninderra Falls in NSW. It is at the draft Master Plan stage.

The development is intended to be a sustainable urban community of international significance, part of the Green Star Communities' Pilot Program. It is intended to include:

- sustainable housing, energy, transport and environmental management
- an integrated community with a diversity of housing, a range of community facilities and employment
- a Conservation Area (that would incorporate public recreation) covering the Ginninderra Falls gorge and a corridor along the Murrumbidgee River (which includes significant remnant habitat for a threatened species and an endangered ecological community and scenic vistas of the river corridor).

¹ Taskforce Media and Communications Strategists Pty Ltd (May 2014).

- resident contribution to public space management through a proposed community Environment Trust, which would also be responsible for management of the Conservation Area²
- recognition of Indigenous culture and history.

1.3 Indigenous culture and heritage

The Indigenous culture, heritage, history and relevant groups of the West Belconnen project area is described in confidential draft reports based on archaeological assessments and cultural heritage consultation conducted by Biosis Pty Ltd³. The area is part of the traditional lands of the Ngunawal people who, in several clan groups, occupied a general area between present day Yass in the north to near Cooma in the south and incorporating the present day Australian Capital Territory. The Canberra region generally is thought to have been a meeting place for different clans due to the its reliable food and water supplies⁴.

The Indigenous connections to country and views of local Indigenous people of the ACT and surrounding area are complex (see the Biosis reports). Biosis consulted the following organisations and groups - ACT Aboriginal and Torres Strait Islander Elected Body; United Ngunawal Elders Council; Buru Ngunawal Aboriginal Corporation; Gunjeewong Aboriginal Cultural Heritage Corporation; King Brown Tribal Group; Koomurri Ngunawal Aboriginal Corporation; Little Gudgenby River Tribal Council; Onerwal Aboriginal Land Council; Ngarigu Currawong Clan; Ngunwal Heritage Aboriginal Corporation; Yurwang Gundana Consultancy Cultural Heritage Services; Ingram Family.

In summary, the West Belconnen area and surrounding areas were heavily utilised by Indigenous people due to the availability of water, food and material resources associated with the Murrumbidgee River, Ginninderra Creek and the woodlands and grassland of the undulating tableland landscape. West Belconnen is also close to the Uriarra Valley and northern Brindabella Mountains which were important places for seasonal gathering of Bogong Moths and associated ceremonies. Bogong Moths were an important food source for the Aboriginal people living around the Australian Alps.

Evidence of Aboriginal occupation at West Belconnen is found in numerous archaeological sites (including artefact scatters) typical of the general area and other indications such as scarred trees and a rockshelter.

Local Indigenous groups consulted by Biosis consider the area to be of cultural significance as a whole because it provides a connection between past Aboriginal use of the Murrumbidgee River area and the present community. In particular, the high density artefact scatters (indicating past camp sites near the river) and a rockshelter have high importance.

Indigenous sites are generally important to contemporary Indigenous communities as places where culture and connection to country can be communicated to the younger generation. They also assist in communicating an appreciation of Indigenous culture in the wider community.

² Elton Consulting (May 2014)

³ Biosis (6 January 2013) and Biosis (10 January 2014).

⁴ www.ngunawal.com.au

2 ACT TOURISM CONTEXT

2.1 ACT visitor offer

The ACT has been best known for its iconic national attractions celebrating the Australia's heritage - such as Parliament House, the War Memorial, the National Gallery and other institutions in Canberra's Parliamentary Triangle and its surrounding precinct. It is now emerging and being positioned by the ACT Government as a more varied destination and a base for exploring the surrounding region.

In addition to iconic national attractions, the ACT visitor offer is presented by VisitCanberra as including the following experiences:

- **special events** – including Floriade (Canberra's main festival), a series of blockbuster events at the National Gallery and major sporting events
- **arts and culture** – a wide range of galleries, museums and heritage buildings
- **food and wine** – a wide range of cafes and restaurants and the nearby cool climate winery region
- **entertainment** - including live performances
- **conferences** – a range of venues, including the National Convention Centre
- **family fun** – including varied activities such as interactive science discovery, Old Parliament House, sport and outdoor activities
- **education** – schools excursions to learn about Australian history, heritage and parliament
- **outdoor adventure activities** – including mountain biking at Stromlo Forest Park and in pine forests
- **nature and adventure** – at the National Zoo, the new National Arboretum and the ACT's numerous parks and reserves including Canberra Nature Park, the Murrumbidgee River Corridor, Tidbinbilla Nature Reserve and Namadgi National Park. The Centenary Trail is a walking and cycling trail that connects the inner parks.

The ACT's wide range of parks and reserves are a significant feature of both the design of the city and its surrounds (as the bush capital) and also in the life and recreation of local residents. There is an active volunteer community engaged in caring for parks and reserves and protecting natural and cultural values.

Indigenous tourism is currently a minor part of the ACT visitor offer, mostly associated with displays in national heritage attractions, local education and activities at Tidbinbilla Nature Reserve and Namadgi National Park. The current Indigenous tourism offer is described in section 4.

2.2 Domestic visitors

The ACT's visitation is primarily domestic in origin. In the year ending June 2013, the ACT received an estimated 2.049 million domestic overnight visitors staying an average of 3 nights⁵. Visiting Friends and Relatives (VFR) is the largest sector forming 38% of visitation. Business (29%) and holidays/leisure (27%) are also significant purposes for visiting the ACT. Most domestic overnight visitors (65%) come from NSW, followed by Victoria (13%) and Queensland (11%). The majority of domestic overnight visitors (68%) reach the ACT by car.

⁵ Tourism Research Australia (2013a). Data sourced from National Visitor Survey.

The ACT also has significant domestic day visitation – 1.819 million visits in the year ending June 2013, which includes people from surrounding regions in NSW.

2.3 International visitors

In the year ending June 2013, the ACT had 180,00 international visitors, nearly half of whom (46%) visited for holiday purposes⁶. VFR (27%) and business visitation (15%) are also important international sectors, while the education sector forms 8% of international visitation. Driving (40%) and air transport (35%) are the main ways international visitors reach the ACT.

The countries of origin with the highest visitor numbers to the ACT are China which supplies 12% of visitors, the USA (11%) and the UK (10%). Visitors from New Zealand (7.3%) and Singapore/Malaysia/Thailand/Hong Kong (10.7%) also form a significant share of visitation.

2.4 Visitor activities and motivations

Domestic leisure visitation activities in the ACT are dominated by its iconic national attractions such as Parliament House, the War Memorial and the National Gallery. Consumer research in 2009⁷ found that the key experiences sought by domestic ACT visitors were:

- Australia's history, visits to museums and heritage buildings
- discovering or learning something new
- arts and culture
- family fun – experiences enjoyed by families with children (of which the ACT has a wide variety).

Events are an important visitation driver for domestic overnight, day and VFR sectors, with Floriade leading to a Spring visitation peak. Blockbuster exhibitions at the National Gallery also stimulate visitation.

The ACT's range of other experiences include food and wine, outdoor and nature, adventure, entertainment and indulgence (spas and relaxation). While they contribute to the overall visitor offer and variety, they are less well-known to domestic visitors and less of a motivation to visit Canberra.

Business events and educational visitation are niche markets for the ACT.

- In 2012/13, 42,000 domestic overnight visitors came to the ACT for a conference, exhibition, convention or trade fair.
- In the same year, 160,681 primary and secondary school students visited Canberra on interstate school excursions.

There is generally a low awareness of Canberra in the international market, where there is a different spectrum of motivations to domestic visitors. Research among the China, Singapore and New Zealand markets suggests motivation to visit the ACT is likely to be spread among food and wine, outdoor, adventure and family fun activities with a lesser interest in iconic attractions and arts and culture⁸.

⁶ Tourism Research Australia (2013a). Data sourced from the International Visitor Survey.

⁷ Tourism Research Australia (2010a).

⁸ ACT Government (2013).

International VFR visitation comprised 26,200 visitors in 2012/13 and is a significant component of Canberra's international visitation.

International students enrolled in the ACT numbered 11,000 in 2012 and the friends and relatives who visit them are a potential market for cultural and natural attractions in Canberra.⁹

2.5 Future Outlook

The ACT has seen recent increases in both domestic overnight and international visitation and expenditure following the Global Financial Crisis and downturns in domestic travel. Between 2011/12 and 2012/13, these increases exceeded the national average visitation increases for both domestic overnight and international visitors. VisitCanberra is planning on continued visitation growth, provided that market share can be maintained. The upgrade of Canberra Airport is expected to boost visitation by increasing domestic capacity (including flights by low cost carriers) and potentially by attracting direct international flights.

Based on factors such as global and Australian economic trends, aviation capacity and domestic consumer confidence, Tourism Research Australia is forecasting continued visitation growth in Australia¹⁰. This is estimated to be a 5.6% increase in international visitors to 2014/15 and a modest 1% increase in domestic visitor nights to 2022/23.

For the ACT, domestic visitor nights are forecast to grow at an annual rate of 2% and international visitor nights at an annual rate of 4.3% to 2021/22¹¹.

A range of measures are being taken by the ACT Government under the *2020 Tourism Strategy* to encourage increased visitation and visitor yield. These include:

- improving the awareness of Canberra as a short break destination through the *VisitCanberra Domestic Marketing Strategy 2013-15* by promoting four key experience pillars – Arts and Culture, Food and Wine, Family Fun and Outdoors and Adventure
- encouraging and promoting a range of events (major events, sport, business) as levers for visitation throughout the year
- marketing the ACT as an education destination
- facilitating new tourism development
- assistance in tourism industry capacity skills development to align with national and international visitor needs and expectations.

The *2020 Tourism Strategy* also aims to improve Indigenous tourism experiences and the participation of Indigenous people in tourism. However, detailed actions to achieve this are not provided in the document.

⁹ Tourism Research Australia (February 2014)

¹⁰ Tourism Research Australia (2013b).

¹¹ VisitCanberra (2013). Sourced from Tourism Research Australia, *Regional Forecasts – Tables, June 2013*.

3 INDIGENOUS TOURISM CONTEXT

3.1 What is Indigenous tourism?

Indigenous tourism includes a range of encounters with Indigenous heritage, culture and society and to some extent depends on the perception of the individual visitor. Indigenous experiences can be direct encounters with Indigenous people and culture through tours, performances and other products or indirect experiences through visits to sites, museums and art galleries. Indigenous tourism is broadly defined by Tourism Research Australia for the purposes of the national and International Visitor Surveys as including :

- experiencing Indigenous art, craft or cultural displays
- attending an Indigenous performance
- visiting an Indigenous site
- visiting an Indigenous community.

Tourism Australia presents Indigenous tourism as one of the experiences that differentiate Australia from other destinations.

Indigenous tourism is also seen as a means for economic and social development for Indigenous individuals, groups and communities and an opportunity for Indigenous communities to raise awareness of their culture. There are over 300 Indigenous tourism businesses in Australia, over half of which are in regional and remote locations where access to sources of income for Indigenous communities is limited. Tourism products operated by Indigenous people include:

- cultural performances
- participatory cultural experiences – making art and craft, bush tucker, staying in communities
- Indigenous guided tours to country and sites
- cultural centres and galleries
- accommodation with associated Indigenous activities.

Indigenous tourism also includes:

- interpretation in national parks and conservation reserves, often presented by Indigenous rangers or local Indigenous people
- Indigenous education – often as a component of school environmental and outdoor education
- components of conferences – such as a Welcome to Country ceremony, tours as part of conference activities.

3.2 Demand

A study of Indigenous tourism in 2009¹² found that about 3 million visitors participated in at least one Indigenous tourism activity during their trip. This was about 17% of Australia's international visitors and 3% of domestic overnight visitors. While the proportion of domestic visitors participating in Indigenous tourism was small, the domestic market is the main Indigenous tourism market in terms of visitor numbers (about 2.1 million visitors in 2009) – comprising about 70% of the Indigenous tourism sector.

¹² Tourism Research Australia (2010b).

Despite an increasing interest in Indigenous culture among Australians, Indigenous tourism experiences are not major drivers for domestic and international travel in Australia, but tend to form an element in the wider motivation and range of experiences sought on a trip. The Northern Territory with its iconic attractions of Kakadu and Uluru and wide range of Indigenous tourism products has the highest profile as an Indigenous tourism destination.

Both Indigenous and mainstream operators are developing Indigenous products to appeal to niche markets such as global *Experience Seekers*, Tourism Australia's main target market who may be international or domestic visitors. *Experience Seekers* represent a new era of travellers. While they differ in age, country of origin and spending power, they are well-educated and travel for personal growth, fulfilment and learning. They are attracted to authentic experiences where they can immerse themselves in the character and culture of a place and its people.

However, recent research suggests the number of Indigenous tourism visitors is not increasing but has declined since 2006¹³. This is thought to be due to:

- low awareness of products among both domestic and international visitors
- time and budget constraints - consumer research showed willingness to pay for Indigenous products generally varied from 'free' to \$100
- barriers for international visitors (including the growing Asian markets) such as language, location (many international visitors stay on the east coast), logistics and access
- higher importance of other activities – such as relaxation and rejuvenation for domestic visitors.

Domestic visitors who participate in Indigenous tourism generally do so as part of a range of experiences characteristic of a place. Many of them are also interested in nature-based, heritage and art and culture activities.

The most popular Indigenous tourism activities undertaken in 2009 were art, craft or cultural displays (54%); visits to Indigenous sites or communities (22%) and visits to Indigenous galleries (24%)¹⁴. Tours with an Indigenous guide were less popular (22%).

Fewer independent than organised tour visitors tended to participate in many Indigenous activities, which are often offered as part of general tour. In particular, only 6% of independent visitors participated in tours with an Indigenous guide.

3.3 Factors for success

The development of Indigenous tourism enterprises with long term viability is a risky undertaking in Australia's competitive tourism environment. For instance a 2009 study of Indigenous tourism businesses in Queensland identified a total of 43 businesses at the time of the study, but found that 19 of these were non-operational¹⁵.

Table 1 summarises the factors that affect long term viability of Indigenous tourism businesses.

¹³ Ruhanen et al (2013).

¹⁴ Tourism Research Australia (2010b).

¹⁵ Whitford & Ruhanen (2009).

Table 1 – Success factors for Indigenous tourism in Australia

Success Factor	Description
Location	Many successful Indigenous products are clustered around destinations with spectacular Indigenous and nature-based attractions, such as the national parks of the NT. They leverage off the areas' wider attractions by offering products that combine nature and Indigenous experiences.
Accessibility to markets	The experience needs to be in the right location and offered at the right price for markets. Transport to the product and the duration of the experience needs to fit within visitors' travel itineraries and budgets. Many successful Indigenous tourism products are located at, or leave from, major visitor nodes. Ease of information and booking is essential for visitors. Contemporary visitors expect online information and booking facilities.
Appeal to markets	The products need to be targeted at the needs and expectations of visitor markets, based on sound market research. With increasingly discriminating visitors and wide use of the internet and social media as sources of information, Indigenous products need to deliver on contemporary expectations for authentic, participatory experiences. Regardless of price point, products need to deliver quality throughout the experience.
Use of partnerships	Partnerships and product packaging with mainstream tourism operators improve Indigenous tourism operators' access to markets. Examples are: <ul style="list-style-type: none"> • inclusion of Indigenous products as components of organised coach tours or shore activities from cruise ships • Indigenous tours as part of conference itineraries.
Filling a market gap	This includes: <ul style="list-style-type: none"> • supplying a service (such as accommodation) lacking in mainstream tourism and then provide an Indigenous cultural element or add-on • offering a distinctive experience differentiated from other Indigenous or mainstream products in a destination.
Marketing and promotion	Awareness of Indigenous products needs to be built through promotion in a range of channels relevant to target markets, including online and via social media.
Funding	Successful Indigenous tourism businesses have needed assistance to obtain the necessary investment funds. In the NT, funding for some tourism has been available from royalties from mining on Aboriginal land. Funding from government sources, Indigenous organisations and Indigenous Business Australia has been critical for many business start-ups.
Capacity building	Acquiring the range of skills and experience to deliver quality tourism experiences is another critical element in tourism business success, whether Indigenous or mainstream. A range of training and mentoring programs are offered for Indigenous business and tourism development. These include training for Indigenous rangers and education providers.
Commitment	Some Indigenous tourism ventures fail because the individual or community underestimated the demands of the business or its intrusion into community life. There needs to be adequate personnel with the time and motivation to present or manage the tourism activity.
Community support	An Indigenous tourism product, whether run directly by Indigenous people or part of a mainstream venture, should have the permission or support of the relevant Indigenous communities or groups. This should include adherence to protocols to protect sensitive sites or information. Native title claims and views of traditional custodianship may also affect support for tourism.

4 INDIGENOUS TOURISM IN THE ACT

4.1 Current Indigenous tourism visitation

There is little data on visitation to Indigenous experiences in the ACT. What exists suggests that:

- 5% of domestic overnight visitors participate in an Indigenous experience while in the ACT, most likely as part of a visit to the National Gallery and national Museum¹⁶
- 15% of the ACT's international visitors undertook at least one Indigenous experience while in Australia (not necessarily while in the ACT).

Indigenous heritage and culture is celebrated in the promotion of the ACT's attractions to visitors and local residents. This includes highlighting evidence for Aboriginal occupation of the area going back at least 21,000 years (from the Birragai archaeological site) and the numerous sites found throughout the region. The Centenary of Canberra celebrations in 2013 included a program of Aboriginal events, performances and exhibitions. Images of rock art sites are used to promote Namadgi National Park and the ACT's natural and cultural experiences in parks and reserves.

Nevertheless, Indigenous tourism is currently a minor part of the ACT visitor offer. It consists of:

- Indigenous heritage, art and culture experiences presented as part of national heritage attractions – at the National Gallery, National Museum and Parliament House
- Indigenous art and craft in commercial galleries
- education experiences – as part of the environmental and outdoor education primary and secondary school curriculum at Birrigai (developed in conjunction with the local Ngunnawal people)
- interpreted walks in Tidbinbilla Nature Reserve and Namadgi National Park
- Aboriginal guided tours in Tidbinbilla Nature Reserve, Namadgi National Park and ???? run by Murumbung Yurung Murra Cultural Tours, a group of Aboriginal staff in the ACT Parks and Conservation Service
- Aboriginal guided walks (in the Ginninderra area, the Franklin ochre site and Black Mountain), school talks and corporate/community talks run by Thunderstone (Murumgui Gurubung) Aboriginal Cultural and Land Management Services which also provides cultural heritage consultancy services.

The current Indigenous tourism offer in the ACT and nearby areas is summarised in Table 2 below.

There are no Indigenous tourism experiences in the areas immediately surrounding the ACT. The closest experiences are:

- Indigenous-led Wiradjuru Wonder Bush Tucker Tour in northern Kosciuszko National Park, run from Tumut (about 2 hours' drive from Canberra)
- Indigenous-led tours and Botanic Gardens at the joint management Booderee National Park at Jervis Bay on the NSW south coast (about 3 hours' drive from Canberra)

¹⁶ Tourism Research Australia (2010b).

Table 2 – Current Indigenous tourism in the ACT and nearby

Product/Activity	Experience	Price	Who visits?	Visitation	Comments
<p>National Gallery of Australia Aboriginal and Torres Strait Islander Art Collection</p>	<p>Largest collection of heritage and contemporary Aboriginal and Torres Strait Islander art in the world.</p> <p>Guided tours 3 days a week.</p> <p>Purchase of Aboriginal art, books and mementos.</p> <p>Web-based resources and information.</p>	<p>Free entry to, and guided tours of, permanent collections.</p> <p>Fee for special exhibitions.</p>	<p>Wide range of National Gallery visitors for whom Aboriginal Art is an incidental experience.</p> <p>Special interest groups - art, culture, Indigenous groups, education.</p>	<p>Total National Gallery visitation in 2012/13 – 436,641 unpaid and 215,402 paid site visits¹⁷. Of these 74,128 were students.</p>	
<p>National Museum of Australia Extensive exhibitions of Aboriginal and Torres Strait Islander social history and culture – one of the major focal points of the Museum.</p>	<p>Thematic displays and multi-media interactive experiences.</p> <p>Special exhibitions and associated talks, tours and competitions.</p> <p>Education programs and resources.</p> <p><i>Connecting to Ngunnawal Country</i> talk and tour with an Aboriginal ranger.</p> <p>Web-based resources and information.</p>	<p>Free entry to permanent exhibitions.</p> <p>Fee for special exhibitions.</p> <p><i>Connecting to Ngunnawal Country</i> - (\$30 adult, \$20 concession).</p>	<p>Wide range of National Museum visitors.</p> <p>Special interest groups – history, culture, Indigenous groups and communities, education.</p>	<p>Total visitation to the Museum site at Acton (all exhibitions) for 2012/13 was 727,694 people¹⁸. Of these 87, 263 were schools visitors, the majority of whom (74,547) came from interstate.</p>	<p><i>Connecting to Ngunnawal Country</i> tour provided by Murumbung Yurung Murra Cultural Tours (see below).</p> <p>The Museum works with Aboriginal and Torres Strait Islander communities to repatriate human remains and sacred objects.</p>

¹⁷ National Gallery of Australia (2013).

¹⁸ National Museum of Australia (2013).

Product/Activity	Experience	Price	Who visits?	Visitation	Comments
Aboriginal Dreamings Gallery Located in Gold Creek Village visitor precinct, Nicholls.	Commercial gallery specialising in authentic Aboriginal Art from around Australia. Established for 25 years. Gift shop. Supplies Indigenous products to conferences and events.	Free entry.	Art collectors, individuals, designers, embassies, government and corporate clients Weekend visitors to Gold Creek Village – local and interstate.	Unknown. Would attract passing trade from visitors to Gold Creek.	Limited opening hours. 11am to 4pm Saturday and Sunday. By appointment on weekdays.
ACT Aboriginal & Torres Strait Islander Cultural Centre Burunju Aboriginal Art Gallery Lady Denman Drive, Yarramundi Reach	Managed by all Indigenous groups in Canberra as a keeping place and focus of education and reconciliation. Unclear whether the Centre and the Art Gallery are open to the public.	Unknown	Unknown	Unknown	
Ngunnawal Country Drive Route	Interpreted self-drive route from the centre of Canberra taking in the Cotter Reserve, Tidbinbilla, Namadgi Visitor Centre, Tuggeranong Homestead and Mt Ainslie.	Free.	Unknown.	Unknown.	
Self-guided walks in Tidbinbilla Nature Reserve and Namadgi National Park	Range of walks with interpretation	Tidbinbilla entry fees Day Pass – private vehicle \$10, concession \$6.50, seniors \$8.50. Annual Pass – private vehicle \$30, concession \$20, senior \$25.	Local Canberra and ACT region residents and families. Range of other visitors.	Tidbinbilla – about 200,000 visitors annually, over half of whom are Canberra residents and about 24% international visitors ¹⁹ . Namadgi NP – Estimated at 130,000 to 150,000 a year in 2010. 69% Canberra residents,	

¹⁹ Territory and Municipal Services Directorate (2012).

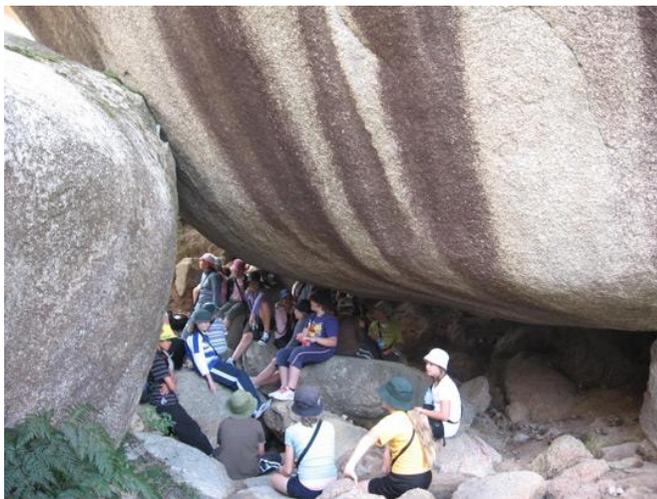
Product/Activity	Experience	Price	Who visits?	Visitation	Comments
		Namadgi National Park – free		3% international visitors and the remainder interstate visitors ²⁰ .	
Murumbung Yurung Murra Cultural Tours (Run by Aboriginal rangers and staff from ACT Parks & Conservation Service.)	Range of tours in Tidbinbilla Nature Reserve, Namadgi National Park and Mt Ainslie. Different tours which include: <ul style="list-style-type: none"> • traditional tools, hunting and crafts • walks to art sites • local Indigenous cultural storytelling. 	Tidbinbilla (3 hrs) - \$30 per person Gudgenby Valley, Yankee Hat Rock Shelter (4 hrs) - \$40 Twilight Walk (1 hr) - \$20 Mt Ainslie (1 hr) - \$20	Mostly Canberra residents and families.	In 2013, 55 tours/cultural activities were offered with total participants of about 1,500 people ²¹ . Limited number of tours and tour places offered. Booked out months in advance.	Has limited funding, resourcing and capacity. Resourcing, capacity building and product development is needed to revitalise and extend the tours. The group is also involved in the development of Indigenous heritage interpretative signs.
Birrigai at Tidbinbilla (Part of the Tidbinbilla Nature Reserve precinct)	Residential and day environmental and outdoor education programs as part of the ACT school curriculum. An Indigenous cultural component developed with local Aboriginal people.	School programs Day - \$9.30 to \$30 per person 2-day Camp - \$45.50 to \$62.80 2-day Camp - \$41.35 to \$79.95 ²² .	Mostly ACT primary and secondary schools. Some non-school groups. Some community hire of facilities.	Total unknown. Has the accommodation capacity for 196 overnight visitors.	
Thunderstone Aboriginal Cultural and Land Management Services	Guided walks in the general Belconnen / Gungahlin area, including Lake Ginninderra and the Franklin ochre site.	Unknown	Unknown. Likely to include local residents and community groups.	Unknown.	Connections with local community groups such as Ginninderra Landcare Group and ACT Heritage Council.

²⁰ TAMS (2010)

²¹ Information provided by ACT Parks and Conservation Service

²² www.tidbinbilla.com.au

Product/Activity	Experience	Price	Who visits?	Visitation	Comments
Wiradjuru Wonders Bush Tucker Tour	Guided tour with NSW National Parks and Wildlife Aboriginal staff in northern Kosciuszko National Park. Includes viewing an Aboriginal campsite, bush tucker and medicinal plants and a bush tucker lunch.	\$95 per person for 3 hour personalised tour including transport, morning tea, handmade artefact. \$19.50 per person for a group tour including morning tea and handmade artefact. Transport is additional. Lunch is an additional \$25 or \$35 per person.	Unknown.	Unknown. The product is personalised and tour group numbers are limited. Personal tours have a maximum of 4 people and groups a maximum of 20 people.	Departs from Tumut.



Indigenous sites in the ACT visited by school groups or guided tours. (Source: www.tams.act.gov.au)

4.2 Potential demand for Indigenous tourism in the ACT

Tourism and social trends that will potentially impact on demand for Indigenous products in the ACT include:

- **direct international air services** – May result in more international visitors to the ACT or en route to places like the Snowy Mountains and Australia’s Coastal Wilderness (far south coast of NSW)
- **trend towards shorter holidays** – More Australians are taking shorter breaks as opposed to the traditional long annual holiday. The ACT Government aims to develop and promote the Territory as a short break destination. Short break visitors will seek a variety of activities and attractions
- **ACT population growth** – The ACT’s population is projected to reach 400,000 people by 2017 and 500,000 by 2033. This is likely to generate local resident’s demand for additional recreation activities and attractions
- **rising costs of energy** – May generate demand for more recreational activities and attractions close to home among residents of the ACT and the surrounding region, especially close to home as costs of energy and travel increase.

The following table explores the potential demand for Indigenous experiences among Australian and ACT visitor markets. Five of these markets were identified by Tourism Research Australia in its 2009 survey of Indigenous tourism visitors²³.

Table 3 – Potential markets for Indigenous tourism in the ACT

Segment	Characteristics	Activities	Potential for ACT
Global Experience Seekers	International visitors Range of ages and price points	Authentic nature and culture based activities. Immersion in/learning about a place or culture. High yield, exclusive experiences. Packages with other activities – e.g. nature based, tours, accommodation.	International visitors not a major market for the area, but may pass through the ACT en route to promoted international destinations – Snowy Mountains, Australia’s Coastal Wilderness (far south coast of NSW). Products that suit this market may also appeal to domestic markets.
Active NT focussed Market identified in TRA (2010b)	35 – 64 years Parents or older working Travel as families or adult couples Range of accommodation and price points Holiday travellers	Active in social, nature-based, cultural and heritage activities. Concern for quality and authenticity. Participate in a range of Indigenous experiences on a trip (e.g. art and craft purchases, gallery or cultural centre visit, visits to communities or sites, guided tours). 45 - 64 group likely to be on an extended trip through other states.	Current focus on the NT which has most Indigenous products and market recognition for Indigenous tourism. Not a major market for the ACT.

²³ Tourism Research Australia (2010b).

Segment	Characteristics	Activities	Potential for ACT
Young singles Indigenous introduction Market identified in TRA (2010b)	15 – 24 years Young singles/parents or with family Likely to favour standard motels, caravan, camping, or VFR accommodation	Social and nature-based activities. Attracted to interesting, memorable experiences they encounter on a trip.	Not a major market for the ACT.
Business meeting excursioners Market identified in TRA (2010b)	35 – 64 years Parents or older working singles Hotel accommodation	Travelling for business – meetings, conferences. Usually activities arranged by business event.	Conferences and conventions are an important niche market for ACT tourism (42,000 visitors in 2012/13). This would require additional product development. The location of Indigenous experiences would preferably be close to conference venues to be viable for short experiences.
Retired regional self- drive visitors Market identified in TRA (2010b)	55 years + Adult couples Likely to favour standard motels, caravan, camping, or VFR accommodation Holiday travellers	Social and nature-based activities on long trips. Lesser participation in Indigenous products, but will do so if an interesting product encountered.	Not a major market for Canberra or one of VisitCanberra's target markets.
Leisure opportunists Market identified in TRA (2010b)	35 – 54 years Parents Employed Couples or family groups Holiday or VFR	Interested in a range of activities. Indigenous tourism not a primary motivator, but participate if the opportunity arises.	Correspond with VisitCanberra's <i>Socially Aware</i> and <i>Visible Achiever</i> target markets.
Local residents	Family groups, couples, singles, residents with VFR.	Day recreation and excursions. Activities for families with children.	Currently the major market for Indigenous tours at Tidbinbilla. Demand for Indigenous experiences may increase in the long term as the ACT population grows
Education	Visiting interstate primary and secondary schools. ACT and nearby region schools.	Interstate schools mostly visit national institutions. Local schools visit a range of tourism sites and participate in a range of activities, including environmental and outdoor education.	Interstate schools are a niche market for the ACT. Environmental and outdoor education experiences for local schools may grow as Canberra's population increases.

5 POTENTIAL INDIGENOUS TOURISM AT WEST BELCONNEN

5.1 Recommended focus

The types of Indigenous tourism products with most chance of success at West Belconnen are those which meet the following criteria:

- **compatibility with the location, its facilities and its other uses.** This might include
 - products associated with the proposed Conservation Area, the Murrumbidgee River and Ginninderra Falls
 - products associated with other tourism activities and facilities – for instance, Taskforce Media’s report on West Belconnen’s tourism potential proposes several developments for consideration including a function centre and a discovery centre and eco-accommodation near the Murrumbidgee River
- **have a point of difference from the current ACT Indigenous tourism offer.** As Indigenous tourism is likely to remain an incidental aspect of ACT tourism, new products will need to distinguish themselves from their competitors – that is, exhibits at the Australian National Gallery and Australian National Museum, Indigenous tours at Tidbinbilla Nature Reserve and Namadgi National Park, school activities at Birrigai
- **fill a gap** in the current ACT tourism offer and/or associated services
- **are attractive to markets** most likely to be interested in Indigenous tourism experiences.

Future demand for Indigenous tourism is most likely to come from the following markets:

- **local residents** in the increasing population of the ACT and surrounding region. This is a main market for Indigenous tours at Tidbinbilla and Namadgi
- **some interstate overnight visitors** – the *Socially Aware* and *Visible Achiever* segments being targeted by VisitCanberra. They seek a range of experiences while in the ACT and a proportion will be potentially interested in nature and culture activities
- the **conference and business market** – seeking add-on excursions and team building activities. This market will be particularly relevant if there are conference facilities at or near West Belconnen
- **schools** – with an increasing population the demand for Indigenous cultural education (associated with environmental and outdoor education) may exceed the capacity of Birrigai. There may also be some demand from the interstate school excursions which come to the ACT to visit national institutions.

A distinctive guided tour focussing on the Murrumbidgee River and combining river canoeing and Indigenous cultural experiences is proposed as a potential Indigenous tourism product for West Belconnen that meets the above criteria.

The possible features of such a tour product, market demand and potential establishment and operating costs are outlined below.

6 MURRUMBIDGEE RIVER CANOE TOUR

6.1 Potential Product Description

This proposal would offer an Indigenous experience different from the current Indigenous guided tours and gallery and museum experiences in the ACT through:

- the element of canoeing
- the stories of the Murrumbidgee River and Aboriginal life along the river corridor
- the potential for camping.



It could potentially tap into local or interstate markets interested in nature and soft adventure, the conference and business market, and smaller school or outdoor education groups. Interpreted canoe journeys are becoming more popular and short and long canoe trails are being developed along many rivers. For instance, the NSW Department of Lands has developed a self-guided canoe and kayak trail from near Burrinjuck Dam to Wagga. There are currently no guided canoe tours on the Murrumbidgee River through the ACT. The only commercial canoe tours in the ACT are offered on and near Lake Burley Griffin for visitors and school, conference and business groups.

The proposal is for a guided canoeing or kayaking experience along the Murrumbidgee River with Indigenous cultural interpretation by an Indigenous guide. It would be aimed at people with no or little previous experience of canoeing or kayaking. In accordance with industry practice, clients would be provided with canoes/kayaks and safety equipment (such as life jackets and helmets) and qualified guides in the relevant guide-client ratio for canoeing and kayaking on inland rivers.

The tour would be a catered half-day experience to enable time for interpretation and travel from the river at the end of the trip. It would potentially start at Uriarra Crossing, which is accessible by vehicle and suitable for launching canoes. It would proceed downstream stopping for an interpretation session and then connecting with a walking track or facilities in the proposed West Belconnen Conservation Area near its confluence with Ginninderra Creek (where there is potential to develop a visitor hub and provide for vehicle access). This is a canoeing distance of about 9 kilometres or less depending on the launch and exit points. Customers would then walk to vehicle transport to return to the start point or Canberra. There could also be an option to have a short guided experience of some of the Aboriginal artefacts or sites during or after the canoe trip.

Story-telling on the tour might include the importance of the Murrumbidgee River to Aboriginal people, their seasonal movements for Bogong Moths and ceremonies in the nearby valleys and mountains, and the relationships between Aboriginal people and European pastoralists.. A lunch stop might incorporate hands-on experiences of tools, food and culture as well as artefacts on site. An optional overnight camping experience might also be considered, provided that overnight camping is permitted under management arrangements.

Clients will expect a quality, seamless experience that includes accessible information and booking (including online capacity); transport to and from the site (or ease of using their own vehicles); and quality equipment, catering and guiding.

Table 4 indicates critical factors to be examined in developing the product.

Table 4 – Considerations in developing an Indigenous Murrumbidgee River Canoe Tour

Factors for consideration	Description
Feasibility of the route	Access to launch and exit points, water depth and river flows (including seasonal flows), lunch and camp sites, canoe transport from the end point, operational period (as winter may be too cold).
Safety and equipment	Suitable canoes, helmets, life jackets, safe practices and ability to communicate them to clients, safe operating procedures (including emergency plans).
Transport	Client transport options to and from the experience, canoe transport from the end point, transport of food and camping equipment.
Expertise	Tour guide skills, canoeing, catering, safety knowledge. Skills training and/or partnerships to provide expertise.
Sustainability	Management of potential impacts of use of the river corridor including impacts on the riverine environment, waste, impacts on Aboriginal sites and artefacts. Permits may be required for some activities. Ecotourism accreditation would assist to link the product with West Belconnen’s environmental sustainability objectives.
Business operations	Approvals, business establishment, start-up funding, financial management, insurance, marketing and promotion of the product. Operational options include: <ul style="list-style-type: none"> • an Indigenous business run by local Indigenous people • a partnership between Indigenous people (who would conduct the guiding) and another tour company that could provide expertise in tour operations. There are a range of programs for assisting Indigenous tourism businesses to start up and develop including funding from Indigenous Business Australia and the Indigenous Tourism Champions Program which assists business development through mentoring and advice.

There may be potential to expand the basic product to offer a wider range of Indigenous cultural tours in the proposed West Belconnen Conservation Area. These might be aimed at local residents, school groups, the conference market and visitors to facilities that might be developed at West Belconnen.

Development of a detailed tour model and business case should include seeking advice from the canoe and kayaking tour industry on markets, equipment, standards and practices, and development and operational costs. For instance one company, Floating Assets (www.floatingassets.com.au), provides advice on operations and asset management to paddle sports businesses.

6.2 Potential Market Demand

A picture of the potential market demand and target markets for the Murrumbidgee River Canoe Tour is provided in Table 5. It shows that the potential market size for nature-based experiences like the Canoe Tour is just over 100,000 participants per annum.

Table 5 – Potential market demand for the Murrumbidgee River Canoe Tour

Visitor Type	Total Numbers (YE June 2013 ²⁴)	Those most likely to be interested in Indigenous tour	Potential Target Markets for Murrumbidgee River Canoe Tour
Local Residents	380,000	11,400. (3% of 380,000 – assumed to be the same rate of interest as the 3% of domestic visitors who participate in Indigenous experiences). Current tours by Murumbung Yurung Murra Cultural Tours attracted 1,500 clients in 2013 (mostly ACT residents). Demand for these tours exceeds supply, suggesting a latent demand for Indigenous tours.	Families. Activity groups. Conferences and businesses. Small school and other education groups.
Domestic Overnight Visitors	2,049,000	61,470. (3% of 2,049,000 – the % of domestic visitors in Australia who participate in Indigenous experiences). Includes 42,000 conference visitors and 160,600 school excursionists.	<i>Socially Aware and Visible Achiever</i> segments on short breaks. Conferences. Small school excursion groups.
International Visitors	180,000	Small number, most likely <i>Experience Seekers</i> . 30,600 (17% of 180,000) is % of International visitors to Australia who participate in Indigenous experiences. There is unlikely to be this level of interest among International visitors to the ACT.	Potential to target Experience Seekers passing through en route to the Australian Alps or Australian Coastal Wilderness destinations. Those seeking an adventure.
TOTAL	-	103,470	

It is recommended that a model or models for the product content and price be tested with potential consumers to assess its appeal to markets as part of the product feasibility assessment and product development process.

6.3 Potential Development Costs

The following estimates for potential development and operating costs are ‘ball park’ estimates based on broad assumptions about the tour product and its operation. The estimates are meant to paint a picture of what needs to be done to establish and operate the proposed tour business and provide an idea of the associated costs and potential income. **A detailed analysis will be required to assess the feasibility of the Murrumbidgee River Canoe Tour product once options for the tour and business operations have been developed.**

²⁴ This is the total visitation to the ACT in the year ending June 2013 – see sections 2.2 and 2.3 of this report.

High level cost estimates for development of a Murrumbidgee River Canoe Tour are provided in Table 6 based on the following assumptions about the tour product:

- an Indigenous-operated business with
 - at least one Indigenous guide providing interpretation who would also be a qualified canoeing guide
 - at least one other qualified canoeing/kayaking guide
- a half-day tour fully catered and equipped, with transport provided from the end point at West Belconnen to the start point at Uriarra Crossing
- a minimum of 6 and a maximum of 20 passengers in double canoes or kayaks, with single canoes or kayaks for guides
- a guide-client ration of 1:10 (based on recommended ratios for canoeing/kayaking by novices on non-technical inland waters)
- another staff member to transfer canoes from the end point to a vehicle at West Belconnen and to assist with transport of clients
- an 8 month operating season from the beginning of October to the end of May, taking account of Canberra’s cold winters.

These assumptions have been made for the purposes of the estimate only and do not necessarily reflect how the tour would be structured following a more detailed feasibility assessment.

Cost estimates for canoes/kayaks have been obtained from a Sydney operator.

Table 6 – Potential Development Costs for a Murrumbidgee River Canoe Tour

Development item	Estimated Cost
Canoes or kayaks 12 double plastic Kayaks @ \$1,750 each (composite - \$3,550 each) 3 single plastic Kayaks @ \$1,150 each (composite - \$2,500 each)	\$24,500 plastic <i>(\$50,000 – composite)</i>
Equipment – including paddles, PFDs, dry bags, jackets	\$6,000
Office equipment and website	\$2,000
Planning – including environmental impact assessment and approvals, risk management planning	\$25,000
Contingency (10%)	\$5,750
TOTAL estimated development costs	\$63,250

The above cost estimates do not include training courses which might be needed for staff – such as tour guide training, canoe/kayak guiding certification, first aid certification.

Development costs might be reduced if the tour was conducted as a partnership with an existing canoeing or kayaking tour company and an Indigenous business. The canoeing/kayaking tour operator would supply the equipment (which it may already own), vehicles and qualified canoeing or kayaking guides. The Indigenous business would supply an Aboriginal guide for the interpretation components. The guide could either accompany the canoe tour (and potentially become a qualified canoe tour guide) or meet the tour at designated locations for interpretation.

Currently, there is only one other kayaking tour company in the Canberra area – Real Fun Canoe and Kayak Adventures (www.realfun.com.au) – which operates tours on and near lake Burley Griffin.

6.4 Potential Operating Costs

High level estimates for annual operating costs are provided in Table 7 on the basis of the tour model described in section 6.3.

Three demand scenarios are provided:

Low Demand – 1 tour a week with 10 clients and 2 guides per trip for 35 weeks. This might equate with patronage during the initial year of operation (35 tours a year, 10 clients each)

Medium Demand – 2 tours a week with 10 clients per trip for 35 weeks (70 tours a year, 10 clients each)

High Demand – 2 tours a week with 20 clients per trip for 35 weeks, plus an additional 10 tours of 20 clients each (an additional tour each week for the October, Summer and April school holidays) (80 tours a year, 20 clients each).

Table 7 – Potential Annual Operating Costs for a Murrumbidgee River Canoe Tour

Operational Cost Item	Description	Estimated Annual Cost		
		Low Demand	Medium Demand	High Demand
Wages	Low demand scenario – 2 staff @ \$250 per day for 35 days Medium demand – 2 staff @ \$250 per day for 70 days High demand – 3 staff @ \$250 per day for 80 days	\$17,500	\$35,000	\$60,000
Fuel	Minibus travelling 50km for each tour	\$340	\$690	\$780
Minibus lease	Lease of second-hand minibus	\$14,000	\$14,000	\$14,000
Marketing	Promotional / marketing costs	\$5,000	\$8,000	\$11,000
Public liability Insurance	Cost would depend on the specific operation – this guestimate provided by kayak tour operator for \$10 million of insurance.	\$7,000	\$7,000	\$7,000
Other operating costs	Administration, office, , licence fees, workers compensation insurance, -	\$3,000	\$3,000	\$3,000
Business loan repayments	At 8% repayment of \$63,250 loan, 10 year term	\$9,500	\$9,500	\$9,500
Total		\$56,340	\$77,190	\$105,280

These estimates do not take account of asset lifecycle management practices, such as sale of canoes/kayaks after a period of years and application of the funds obtained towards purchase of new replacements.

6.5 Potential Income

The tour income will depend on the number of clients, demand for the product and the product price point. Without knowing the details of the tour and the business operational details it is difficult to assess an appropriate price point for the tour that would provide adequate revenue to provide a return on investment.

An indication of what the market is willing to pay is provided by guided canoe or kayak tours with nature and/or culture interpretation on the NSW South Coast (a popular holiday destination for Canberra residents) and the Murray River. Descriptions and prices of a selection of tour products are summarised in Table 8.

Table 8 – Examples of guided canoe/kayak tours with nature or culture interpretation

Company	Tour Details	Price	
Region X Kayaking Batemans Bay, NSW www.regionx.com.au	Sea Kayak Breakfast Tours 3 hour tour including breakfast.	\$99 per adult	Aim to provide interpretation of the coastal environment, wildlife, Indigenous and European history. These tours and 3 other tours can operate every day, depending on demand.
	Batemans Sea Kayak Tour Relaxed 3 hour tour of the waterfront, estuary and mangroves. Snacks provided.	\$80 per adult	
Total Eco Adventures Broulee, NSW www.totalecoadventures.com.au	Discovery Kayak Tour 2.5 hour flat water tour on Tomaga River with ecology and history interpretation. Aimed at families, friends and adults. Operates 2 to 3 times a week in school holiday and Wednesday and Sunday mornings from September to May.	\$45 per adult \$40 per child	Company operates a range of other paddling, snorkelling experiences, outdoor and environmental education programs. It also offers the South Coast Eco Retreat Experience which combines accommodation with outdoor activities (kayaking, bushwalking), yoga and meditation.
	Eco Kayak Tour 2.5 hour tour on Tomaga River focussing on ecology and wildlife. Aimed at adults. Morning or afternoon tea provided. Operates on selected days.	\$65 per adult	
	Marine Park Exploration Tour 4.5 hour kayaking and snorkelling experience in Tomaga Estuary. Morning tea and snacks provided. Aimed at families and adults. Operates on selected days.	\$80 per adult \$70 per child	
Riverland Leisure Canoe Tours Renmark, Murray River, SA www.riverlandcanoes.com.au	Evening Tour 2.5 hour tour.	\$60 per adult \$45 per child	Tours are conducted in the Riverland Biosphere Reserve and wetlands of international significance. Company offers a range of other tours on request and also hires canoes.
	Half Day Tour 3.5 hour tour. Snacks and drinks provided.	\$75 per adult \$50 per child	
	Day Tour Leisurely 8 hour tour with lunch and drinks provided.	\$120 per adult \$85 per child	

Company	Tour Details	Price	
Canoe the Coorong Near Victor Harbour, SA www.canoethecoorong.com	New Zealand Fur Seal Tour 2 hour tour. Operates daily weather permitting.	\$75 per adult \$60 per child	The tours are conducted in the Coorong National Park at the mouth of the Murray River. The company provides other tours on demand and activities for the corporate market and school groups. It also hires canoes.
	Coorong Tour 6 hour tour incorporating interpretation, a bush tucker walk , a visit to the iconic Murray Mouth, lunch and morning and afternoon teas. Operates most days.	\$135 per adult \$85 per child	
	Overnight Tour Kayaking to a camp (already set up) with a bush tucker walk , spotlighting, fishing and cooking caught/collected foods. Aimed at adults or school groups.	\$390 per adult \$340 per student	
Go Sea Kayak Byron Bay, NSW www.goseakayakbyronbay.com.au	3 hour sea kayak tour in a marine park with close experiences of whales, dolphins and turtles. Local Indigenous stores told by Aboriginal staff.	\$69 per adult \$59 per child	High volume iconic product which operates twice a day off the beach at Byron Bay, a popular holiday destination. The company also offers a range of tour packages including accommodation, food, surfing lessons and Mt Warning bushwalking options.

A broad picture of the level of income that might be returned from the Murrumbidgee River Canoe Tour model is provided in Table 9 using adult customer prices similar to those for charged for similar tour products as described in Table 8 above. Two price points are provided - representing a lower cost family oriented tour and a higher cost tour offering a higher level of interpretation and food quality aimed at corporate, business and adult markets.

The income estimate is provided for the low, medium and high demand scenarios (see section 6.4).

Table 9 – Potential Murrumbidgee River Canoe Tour income estimates

Tour Price Point	Estimated Annual Income		
	Low Demand	Medium Demand	High Demand
Low priced option - \$70 per adult A shorter tour aimed at families and small school groups offering less interpretation and snacks only (no lunch).	\$24,500	\$49,000	\$112,000
Higher priced option - \$100 per adult A more exclusive tour aimed at adults and the corporate and business markets and providing a bush tucker lunch.	\$35,000	\$70,000	\$160,000

It is observed that many canoe/kayak tour operators offer multiple products of different types that diversify their income sources. Combinations of products include a range of different tours (different lengths and for different markets); canoe/kayak hire; canoe/kayak instruction for guide certification or private tuition; other tour products (such as walking, mountain biking).

Income diversification opportunities for an Indigenous-run Murrumbidgee River Canoe Tour business might include land-based cultural tours at the West Belconnen Conservation Area.

7 OTHER OPPORTUNITIES FOR INDIGENOUS PEOPLE AT WEST BELCONNEN

There may also be opportunities for Indigenous employment and/or businesses related to the West Belconnen Conservation Area.

The visitor facilities, uses and management model for the proposed West Belconnen Conservation Area have not yet been determined. Depending on how the area is managed and the visitor experiences that are offered, there may be opportunities for:

- **involvement of the local Indigenous community in management**, such as through membership of a management board or community consultative committee. This would assist in developing the profile of the area's Indigenous values and history, as would an Indigenous name for the Conservation Area. The preliminary proposals for the West Belconnen Environmental Trust includes an Indigenous representative on the Board of Directors²⁵
- **employment/contracts for development of Indigenous interpretation and signage**
- **employment of Indigenous people as staff or contractors** – such as rangers, tour guides, administrative, service and maintenance staff
- **contracts/licences for other Indigenous cultural tours or interpretation.**

It is recommended that the relevant Indigenous groups be consulted in the development of the Conservation Area management model and management planning to incorporate their ideas on potential participation, employment and business opportunities.

²⁵ Elton Consulting, May 2014

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