



PERFORMANCE AUDIT REPORT

9 May 2023

Growing ecotourism in Queensland

Report 12: 2022–23

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The Honourable C Pitt MP
Speaker of the Legislative Assembly
Parliament House
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9 May 2023

This report is prepared under Part 3 Division 3 of the *Auditor-General Act 2009*.



Brendan Worrall
Auditor-General



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Acknowledgement

The Queensland Audit Office acknowledges the Traditional and Cultural Custodians of the lands, waters, and seas across Queensland. We pay our respects to Elders past, present, and emerging.

We use the term 'First Nations people' in this report. We respect First Nations people's choice to describe their cultural identity using other terms, such as Aboriginal and Torres Strait Islander peoples, particular peoples, or by using traditional place names.

Report on a page

Ecotourism is *ecologically sustainable* tourism, with a primary focus on experiencing natural areas, that fosters environmental and cultural understanding, appreciation, and conservation. Blessed with world-class natural and cultural assets, Queensland has competitive advantage over many other locations. The Queensland Government's vision is to capitalise on this natural advantage and make Queensland a world leader in ecotourism, while conserving its natural and cultural assets and partnering with Traditional Owners of the land. We examined the effectiveness of the state's tourism and environmental entities in developing sustainable ecotourism in Queensland.

Direction for growing ecotourism

In November 2022, the Department of Tourism, Innovation and Sport released a broader tourism strategy, *Towards Tourism 2032 – Transforming Queensland's visitor economy future*, which recognises the opportunity for the state to lead the world in sustainable tourism and ecotourism experiences. It has specific actions for developing the ecotourism sector. But the Queensland Government has no statewide policy on ecotourism that clearly defines how the state's tourism and environmental entities will work towards its vision, inhibiting ecotourism planning and coordination. Recognising the often competing roles and priorities of responsible entities, there is a need to establish a definition of ecotourism and what it means to the state – both within and outside Queensland's protected areas. The entities have also not developed a clear roadmap to direct how they will act to achieve the state's ecotourism vision.

Planning and coordinating ecotourism

Clarity of policy, definition, and action is necessary for the entities and the tourism industry to effectively plan and coordinate managing the difficult balance between conservation and ecotourism. The tourism industry needs clarity and certainty to enable it to make informed commercial decisions and develop viable initiatives, which will not only benefit the industry but also contribute to growing the state's economy.

A statewide policy on ecotourism will allow entities to align ecotourism-related strategies and plans with government's ecotourism priorities, and identify differences in priorities and tolerances for developments in and outside protected areas. Strategies and plans should include investment priorities for government funding, and clear goals and measurable success indicators to monitor and report progress.

Identifying ecotourism opportunities

Until recently, identifying ecotourism opportunities was reactive and unstructured. No ecotourism investment strategy meant state investment has been based on limited understanding of development priorities. A Tourism Infrastructure Development Framework is being prepared, under which the state will identify and assess tourism infrastructure projects and initiatives. In conjunction with a statewide policy, the framework should provide more rigour and direction.

Managing ecotourism in protected areas

The Department of Environment and Science has a robust process for assessing and approving proposals in protected areas ('on park' developments). Its processes reflect state and Commonwealth environmental and planning legislative requirements. Consultation with Traditional Owners is an integral part of any ecotourism facilities proposal in protected areas. Industry feedback is that the process is lengthy and complex, and often costly. Greater government guidance and support would assist industry in making informed decisions. It would assist proponents in navigating the various legislative and approval processes and enhance their ability to partner with Traditional Owners.



1. Audit conclusions

The state's tourism and environmental entities face a difficult challenge between protecting Queensland's unique natural environment and deriving economic benefit for Queenslanders. Historically, the balance has tended to lean in favour of conserving protected areas (national parks, conservation parks, nature refuges, and special wildlife reserves) with relatively few ecotourism proposals progressing to successful development and operation.

The Department of Tourism, Innovation and Sport and the Department of Environment and Science (the departments), Tourism and Events Queensland, and the tourism industry do work together to overcome these challenges in meeting the state government's vision of making Queensland a world leader in ecotourism. However, their success to date has been limited. Since 2013, the Department of Environment and Science has approved 3 ecotourism facilities in national parks, with 2 more in development. The approval processes and delivery of these developments were lengthy, complex, and costly. The absence of a statewide policy on ecotourism means it is difficult to measure the development of ecotourism outside Queensland's protected areas.

Success in effectively balancing the state's environmental protection and ecotourism development priorities is considerably inhibited by the departments not proactively clarifying the government's policy, priorities, and tolerances for ecotourism developments within and outside protected areas. Successive governments have had different views on how to approach ecotourism. Legislation has changed, 'ecotourism' has been defined differently, and policies have differed on commercial activities and infrastructure development. Governments have also taken different approaches to attracting and supporting industry development. All this has resulted in processes for identifying and planning ecotourism opportunities that are vague and poorly defined. Processes for approving ecotourism facilities on protected areas are complex, and onerous for proponents to navigate. Meanwhile, the demand for nature-based experiences from both domestic and international visitors has continued to evolve and increase.

The *Towards Tourism 2032 – Transforming Queensland's visitor economy future* strategy, launched in November 2022, includes a greater focus on, and some actions in, developing ecotourism and nature-based tourism. It also recognises the opportunities for First Nations tourism that showcase and enrich cultural experiences for visitors and deliver economic opportunities for Traditional Owners, and Indigenous communities and businesses.

But the strategy falls short on providing the clarity of government policy, priority, and risk appetite needed to stimulate greater ecotourism investment and benefits. In the interim, the Department of Tourism, Innovation and Sport and the Department of Environment and Science could provide more support to proponents to navigate the system. They could also do more to leverage the competitive advantage of the many other natural areas outside of protected areas.



2. Recommendations

We make the following recommendations in this report.

Planning and coordinating ecotourism

1. We recommend that the Department of Tourism, Innovation and Sport and the Department of Environment and Science, in consultation with the Department of the Premier and Cabinet, develop an overarching statewide policy position on ecotourism for both on and off protected areas (Chapter 4) that:
 - clearly defines ecotourism, and the scales and types of ecotourism development acceptable to the state
 - identifies the state's priorities for ecotourism opportunities both on and off protected areas. This should include any differences in priorities and tolerances for developments within and outside national parks while respecting the cultural and traditional ownership of First Nations people
 - sets a clear direction for achieving the vision of Queensland becoming a world leader in ecotourism, providing improved consistency and clarity for government entities, industry operators, and potential developers in understanding and implementing government's ecotourism priorities.
2. Following the development of a statewide policy position on ecotourism, we recommend that:
 - the Department of Tourism, Innovation and Sport leads the development and implementation of an ecotourism roadmap for Queensland (aligned under the *Towards Tourism 2032 – Transforming Queensland's visitor economy future* strategy), with a focus on supporting private investment and development in ecotourism outside Queensland's protected areas (Chapter 4)
 - the Department of Environment and Science leads the implementation of ecotourism in protected areas through its *Ecotourism Plan for Queensland's Protected Areas 2023–2028* (Chapter 4).
3. We recommend the Department of Tourism, Innovation and Sport; the Department of Environment and Science; and Tourism and Events Queensland develop, finalise, or update individual plans that clearly define how they will achieve the government's vision of Queensland becoming a world leader in ecotourism, within their area of responsibility (Chapter 4).

This includes:

 - aligning individual ecotourism-related strategies and plans with the *Towards Tourism 2032 – Transforming Queensland's visitor economy future* strategy and the statewide policy position on ecotourism and ecotourism roadmap (once developed)
 - developing investment priorities to ensure government funding is directed to/aligned with the vision and policy position on ecotourism
 - using available information on nature visitor preferences for planning and prioritising ecotourism facilities, activities, and projects
 - having clear goals, measurable indicators of success, and performance targets in all strategies and plans and regularly monitoring and reporting on progress.



Approving ecotourism facilities

4. We recommend the Department of Environment and Science, in consultation with the Department of Tourism, Innovation and Sport:
 - consider ways to further reduce the complexity of obtaining government approvals for ecotourism facilities
 - provide greater support to proponents in navigating the legislative, engagement, and approval processes for ecotourism facilities.

Reference to comments

In accordance with s.64 of the *Auditor-General Act 2009*, we provided a copy of this report to relevant entities. In reaching our conclusions, we considered their views and represented them to the extent we deemed relevant and warranted. Any formal responses from the entities are at [Appendix A](#).



3. Ecotourism in Queensland

DEFINITION

Ecotourism is *ecologically sustainable* tourism, with a primary focus on experiencing natural areas, that fosters environmental and cultural understanding, appreciation, and conservation. *Source: Ecotourism Australia and Nature Conservation Act 1992.*

Nature-based tourism is leisure travel undertaken largely or solely for the purpose of enjoying natural attractions and engaging in a variety of nature-based activities. This can range from simple natural encounters to more immersive ecotourism experiences, where being in nature is the key driver for the experience. *Source: Tourism and Events Queensland.*

Protected areas are land-based areas including national parks, jointly managed national parks, conservation parks, resources reserves, and private land declared as a nature refuge or special wildlife reserve. *Source: Nature Conservation Act 1992.*

Ecotourism facilities are designed and managed to facilitate the presentation, appreciation, and conservation of the land’s natural condition and cultural resources and values. *Source: Nature Conservation Act 1992.*

This chapter provides information on ecotourism and its significance in Queensland.

Ecotourism snapshot

Figure 3A provides a snapshot of ecotourism in Queensland.

Figure 3A
Queensland ecotourism snapshot



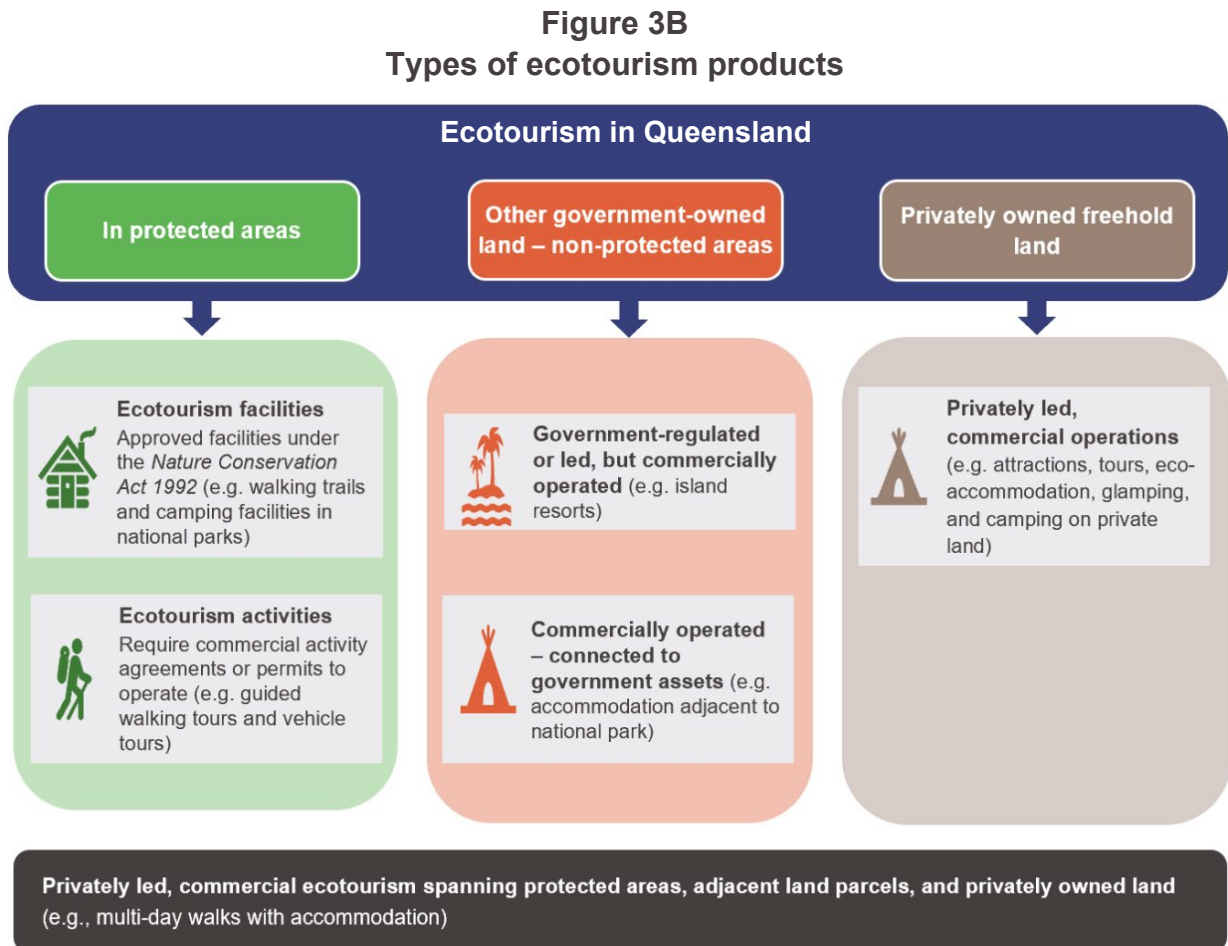
Source: Compiled by the Queensland Audit Office using latest available information from the following sources: percentage of land area – Queensland’s Protected Area Strategy 2020–2030; number of visitors to national parks and jobs supported – The University of Queensland’s report on estimating the value of national parks to the Queensland economy.



Ecotourism products

The Queensland Government supports the development and operation of ecotourism facilities and activities both in and off protected areas. Ecotourism activities range from those that are government-funded and managed – such as walking tracks, lookouts, and amenities in national parks – to those that are privately developed and operated. Many natural areas offering ecotourism activities, such as beaches, hinterlands, rainforests, and the outback, are both within and outside protected areas.

Figure 3B provides a snapshot of the types of ecotourism products in Queensland.



Source: Compiled by the Queensland Audit Office from information provided by the audited entities.

Tourism operators who conduct commercial operations in Queensland’s national parks require a commercial activity permit or an agreement authorised by the Department of Environment and Science. There are currently around 480 authorised permits or agreements.

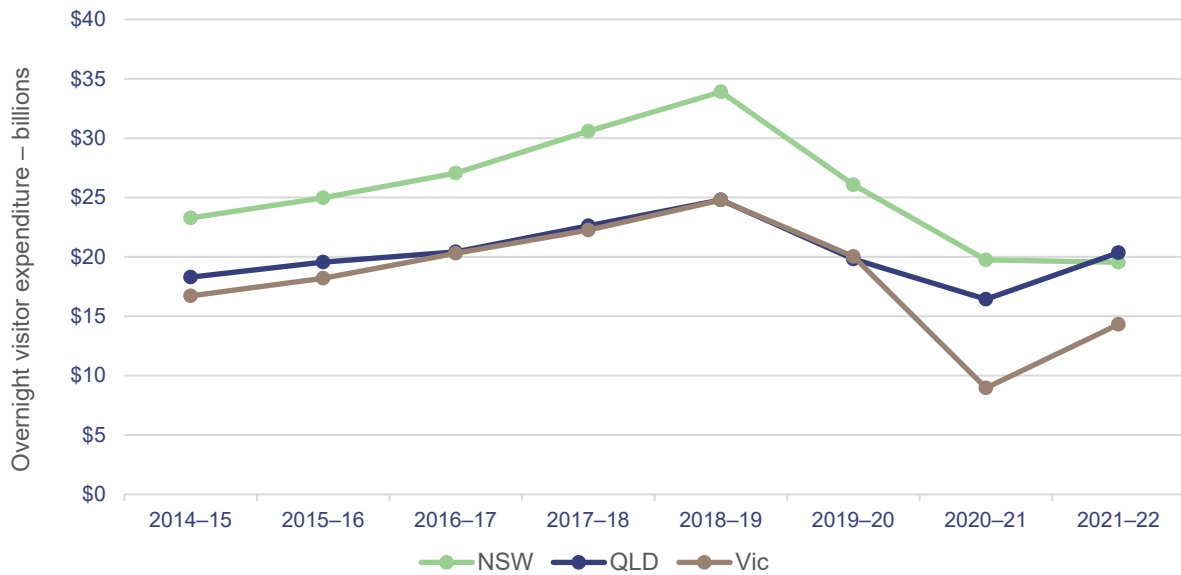
Economic value of tourism

Tourism is a significant contributor to Queensland’s economy through domestic and international visitors (the visitor economy). The visitor economy is measured by overnight visitor expenditure and market share.

Data is collected through international and national visitor surveys conducted by Tourism Research Australia (part of Austrade). The main data collected through telephone surveys includes information on destination, purpose of trip, accommodation, leisure activities, and trip expenditure.

Figure 3C shows the annual overnight visitor expenditure in Queensland compared to New South Wales and Victoria.

Figure 3C
Annual overnight visitor expenditure – domestic and international



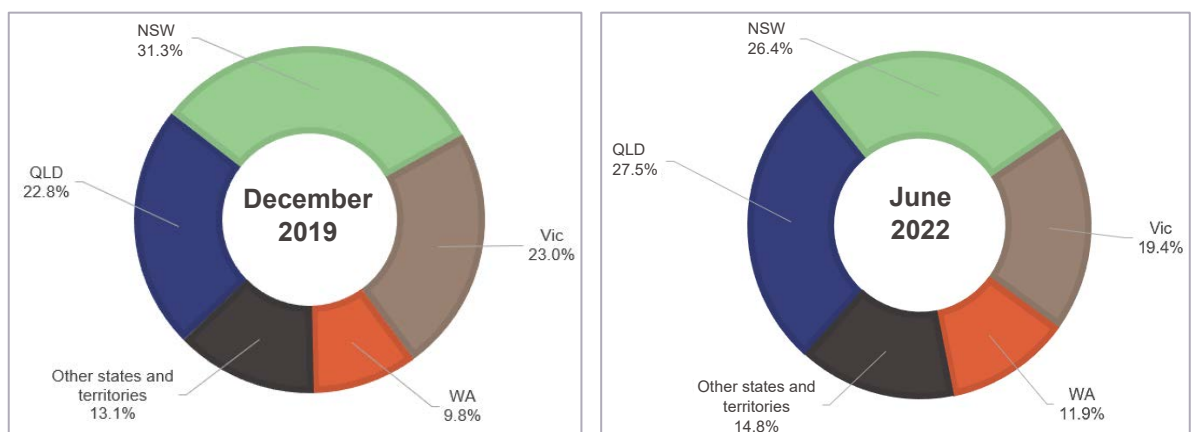
Note: NSW – New South Wales; QLD – Queensland; Vic – Victoria.

Source: Compiled by the Queensland Audit Office using information from international and national visitor surveys conducted by Tourism Research Australia.

The total overnight visitor expenditure in Queensland in the year ended June 2022 was \$20.4 billion. This was an increase of 23.9 per cent from the previous year, but down 20.2 per cent compared to the pre-COVID-19 year ended December 2019. Due to international travel restrictions, domestic overnight visitor expenditure accounted for 97 per cent (\$19.6 billion) of the total. Figure C1 in Appendix C shows the total overnight visitor expenditure by Queensland regions for the years 2018–19 and 2021–22.

Figure 3D shows that Queensland made the largest gain of the states and territories in market share (up 4.8 percentage points to 27.5 per cent) from December 2019 to June 2022.

Figure 3D
Market share of overnight visitor expenditure – domestic and international



Note: QLD – Queensland; NSW – New South Wales; Vic – Victoria; WA – Western Australia.

Source: Compiled by the Queensland Audit Office using information from international and national visitor surveys conducted by Tourism Research Australia.



Government roles

Achieving the Queensland Government’s vision for ecotourism requires the collaboration of many entities at federal, state, and local government levels. It also requires the government to work with regional tourism organisations, industry, and commercial businesses. Each has a different role to play.

In this audit, we have focused on the key ecotourism-related roles of the 3 Queensland Government entities listed in Figure 3E.

Figure 3E
Queensland Government entities involved in ecotourism

| Government entity | Primary roles relating to ecotourism |
|---|---|
| Department of Environment and Science | Contribute to Queensland’s economy by enabling sustainable development and promoting nature-based tourism within the protected areas. Safeguard and manage Queensland’s natural, cultural, and heritage values. |
| Department of Tourism, Innovation and Sport | Promote long-term growth of the tourism industry by facilitating a strategic, whole-of-government approach to planning and investment in the state’s tourism infrastructure, assets, and products, and coordinating and leveraging major events to generate jobs. |
| Tourism and Events Queensland | Achieve economic and social benefits for the state by generating consumer demand, attracting and promoting major events, and supporting tourism experience and destination development. |

Source: Compiled by the Queensland Audit Office using information from government annual reports and service delivery statements.

Impact of COVID-19

The COVID-19 pandemic caused severe disruptions to demand for tourism, both globally and in Australia. The industry experienced:

- a sudden halt in international visits
- restrictions on mobility within the state and country
- increased health and safety concerns.

However, the pandemic also saw an increase in demand for nature-based experiences, with people deeming them safer and more than ever wanting wide-open spaces, fresh air, and nature. The state and international border closures saw an increase in the domestic market.

In early 2021, the Queensland Government established the Tourism Industry Reference Panel, made up of 3 tourism industry experts. The panel facilitated industry engagement and worked with government entities to consider the actions required and made recommendations for positioning Queensland’s tourism industry for success after COVID-19. This led to a new tourism strategy: *Towards Tourism 2032 – Transforming Queensland’s visitor economy future*, which was launched on 3 November 2022.

4. Planning and coordinating ecotourism

This chapter is about how the state's tourism and environmental entities – the Department of Environment and Science; the Department of Tourism, Innovation and Sport; and Tourism and Events Queensland – plan, invest, and coordinate ecotourism activities in Queensland.

Clarity on ecotourism policy position needed

At present Queensland has no ecotourism strategy document. The Queensland Government also has not clarified its strategy or policy position and priorities for ecotourism. In its *Towards Tourism 2032 – Transforming Queensland's visitor economy future* strategy, it has provided an aspirational vision of making Queensland a world leader in ecotourism, while conserving its natural and cultural assets. The tourism strategy includes specific actions to develop the ecotourism sector but does not provide a roadmap that outlines the direction entities must take for Queensland to achieve its vision or manage the balance between conservation and developing ecotourism for economic benefit.

The Department of Tourism, Innovation and Sport and the Department of Environment and Science (the departments) should seek greater clarity from a whole-of-government perspective on Queensland's policy, risk appetite, priorities, and approach to ecotourism and industry development. With the absence of this clarity, the departments and the ecotourism operators are inhibited by uncertainty, inconsistent approaches, varying interpretations, and unresolved tension between development and environmental protection.

Recommendation 1

We recommend that the Department of Tourism, Innovation and Sport and the Department of Environment and Science, in consultation with the Department of the Premier and Cabinet, develop an overarching statewide policy position on ecotourism for both on and off protected areas that:

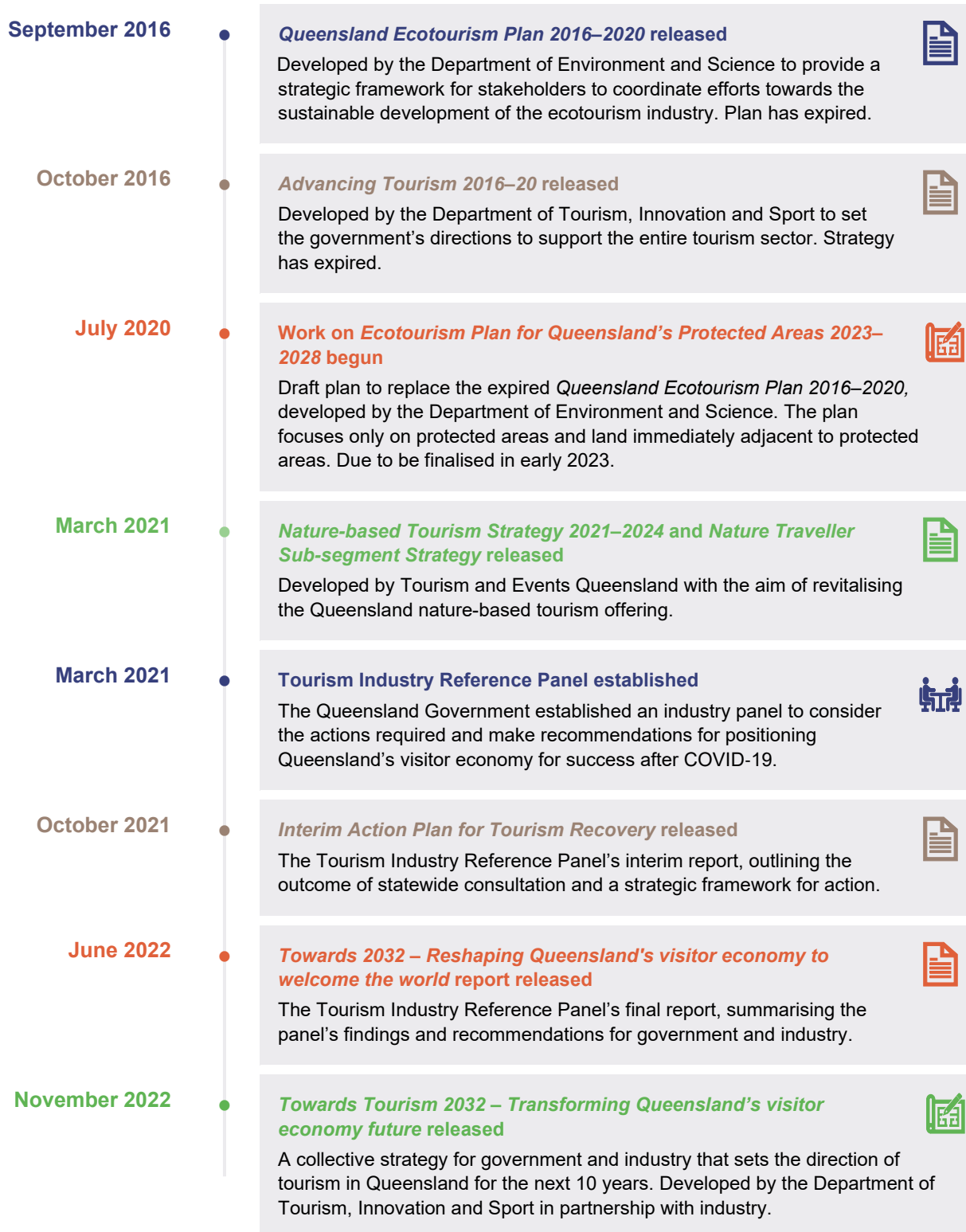
- clearly defines ecotourism, and the scales and types of ecotourism development acceptable to the state
- identifies the state's priorities for ecotourism opportunities both on and off protected areas. This should include any differences in priorities and tolerances for developments within and outside national parks while respecting the cultural and traditional ownership of First Nations people
- sets a clear direction for achieving the vision of Queensland becoming a world leader in ecotourism, providing improved consistency and clarity for government entities, industry operators, and potential developers in understanding and implementing government's ecotourism priorities.



Ecotourism-related strategies and plans

Figure 4A shows strategies, plans, and reviews relating to ecotourism since 2016.

Figure 4A
Strategies, plans, and reviews relating to ecotourism



Source: Compiled by the Queensland Audit Office from information provided by the audited entities.



The previous tourism and ecotourism strategies both ended in 2020, coincidentally at the time the COVID-19 pandemic was having a major impact on the tourism industry.

In the absence of a coordinated unifying state ecotourism strategy, Tourism and Events Queensland and the Department of Environment and Science have developed separate strategies specific to their areas of responsibility:

- Tourism and Events Queensland's *Nature-based Tourism Strategy 2021–2024*, which focuses on industry growth; and
- Department of Environment and Science's draft *Ecotourism Plan for Queensland's Protected Areas 2023–2028*, which focuses on protecting the environmental value of national parks.

In its *Nature-based Tourism Strategy 2021–2024*, Tourism and Events Queensland sets a target of growing the market share of domestic overnight leisure visitors to Queensland participating in nature-based activities to 31 per cent by 2024. In September 2021 it was 28.4 per cent, based on data from international and national visitor surveys conducted by Tourism Research Australia. However, there is no whole-of-government plan on how to achieve this growth in market share.

The draft *Ecotourism Plan for Queensland's Protected Areas 2023–2028* outlines goals and actions for developing ecotourism within protected areas and facilitating new ecotourism projects on land adjoining protected areas. But there is no clear plan for how government will leverage the competitive advantage of the many other natural areas outside of protected areas.

Existing ecotourism-related strategies and plans that are publicly available do not include measurable indicators of success, thus reducing public accountability. Plans and strategies, both internal and external, need clear objectives, performance targets, and measurable indicators of success, and entities need to effectively monitor progress against them. This should also include measures of outcomes for Traditional Owners. We note that Tourism and Events Queensland has an expanded, internal version of the *Nature-based Tourism Strategy* that includes indicators of success and performance targets.

Ecotourism roadmap needed to guide development both within and outside protected areas

Only when the Queensland Government has clarified its strategy or policy position and priorities for ecotourism can the departments realistically develop a plan for achieving the state's ecotourism vision.

At present the state has no plan or roadmap for how the departments will work with and support industry. Such a plan/roadmap is necessary to provide direction and a level of certainty, and to demonstrate progress.

Recommendation 2

Following the development of a statewide policy position on ecotourism, we recommend that:

- the Department of Tourism, Innovation and Sport leads the development and implementation of an ecotourism roadmap for Queensland (aligned under the *Towards Tourism 2032 – Transforming Queensland's visitor economy future* strategy), with a focus on supporting private investment and development in ecotourism outside Queensland's protected areas
- the Department of Environment and Science leads the implementation of ecotourism in protected areas through its *Ecotourism Plan for Queensland's Protected Areas 2023–2028*.



Opportunities and potential projects are not strategically identified and prioritised

The lack of a clear ecotourism roadmap is affecting how potential projects are identified and prioritised. This makes it difficult to undertake a strategic assessment of ecotourism investment opportunities for both within and outside protected areas. The identification of potential projects has previously been short term and reactive. In addition, until recently, the lack of a tourism project selection framework means potential projects could not be objectively assessed against each other and prioritised.

However, both the Department of Environment and Science and the Department of Tourism, Innovation and Sport have taken actions in the last 2 years that, when fully implemented and utilised, have the potential to address this issue.

In 2021, the Department of Environment and Science engaged external contractors to investigate and compile a portfolio of suitable locations for potential ecotourism development opportunities. This included current campgrounds and areas previously disturbed within protected areas, and areas adjacent to existing protected areas with the potential to develop off-park accommodation and experiences with access to walking trails on-park.

The Department of Environment and Science has used this review to inform its investment decisions in developing national parks. The recent Activate Ecotourism Infrastructure (Act Eco) funding initiative also took account of the identified priority areas during the assessment process of ecotourism or nature-based tourism infrastructure projects adjacent to a public protected area, world heritage area, state forest, or timber reserve.

The Department of Tourism, Innovation and Sport is developing the Tourism Infrastructure Development Framework, which is an assessment framework through which state and private-led projects will be funnelled, providing a consistent approach.

The framework aims to ensure projects are strategically identified and prioritised, and the extent and nature of state involvement and associated risks are determined and resourced. However, as the Department of Tourism, Innovation and Sport is yet to implement the framework, we cannot assess how effective it will be in prioritising projects across the state – both within and outside protected areas.

There is no investment strategy to guide funding priorities

Government funding is provided for state-led ecotourism projects and for grants to private tourism operators. Since 2012, the government has invested around \$14.8 million in ecotourism facilities projects in protected areas, such as eco-accommodation and multi-day walks. It has also provided around \$99 million in grant funding for other ecotourism-related projects and activities. However, with no ecotourism plan or investment strategy, the level of state investment is based on a limited understanding of priorities regarding where investment is needed and for what.

The government needs to better understand the strategic demand for ecotourism projects at a regional, industry, and project level to ensure funding is effectively directed and aligned with its vision for ecotourism. A statewide policy position would identify the state's priorities for ecotourism for both on and off protected areas and provide better direction for government funding.

The Tourism Industry Reference Panel's *Towards 2032 – Reshaping Queensland's visitor economy to welcome the world* report highlighted the need for more investment and funding. One of its recommendations was to have a funding stream specific to incentivising ecotourism projects.

More recently, government established 2 additional grant programs specifically to fund ecotourism and nature-based tourism:

- The Activate Ecotourism Infrastructure (Act Eco) pilot initiative will provide financial support to Queensland tourism operators, not-for-profit organisations, and local governments to deliver ecotourism and nature-based tourism infrastructure adjacent to, or near, a protected area, world heritage area, timber reserve, or state forest.
- The \$2 million Eco-certified Tourism Destination Program provides grant funding of up to \$150,000 to Queensland local government authorities and regional and local tourism organisations to assist tourism destinations to achieve globally recognised certification through one of the following programs
 - Ecotourism Australia – Eco Destination Certification program
 - EarthCheck – Sustainable Destination Standard program.

Expressions of interest for the Activate Ecotourism Infrastructure (Act Eco) funding initiative closed in late 2022 with funding decisions made in early 2023.

Information on visitor preferences could be better used

Tourism and Events Queensland analyses and utilises data and conducts research on many aspects of the tourism industry, providing information and insights to assist government and industry stakeholders with decision-making and strategy development.

Identifying customers and what they want is vital to attracting international and domestic travellers and becoming a world leader in ecotourism. Research into traveller needs and preferences can help define tourism focuses, priorities, and goals. It can influence and guide partners in aligning activities and maximising opportunities to target consumers. However, it is unclear how well this information is currently used by government outside of Tourism and Events Queensland for planning and prioritising ecotourism strategies.

Using information to drive consumer demand

By marketing and promoting tourism in Queensland, Tourism and Events Queensland drives consumer demand and leads the development of branding for tourism. To meet growing consumer demand for nature-based experiences and in line with Queensland's tourism brand purpose to 'travel for good', it has developed the *Nature-based Tourism Strategy 2021–2024* and *Nature Traveller Sub-segment Strategy* to guide visitor growth to Queensland and increase visitation and traveller spending.

The *Nature Traveller Sub-segment Strategy* integrates a nature proposition into statewide marketing and promotion. The strategy spans all travel types and identifies:

- challenges and opportunities – how to capitalise on growth in demand, build Queensland's competitive advantage, and reposition Queensland's nature offering
- global consumer trends affecting demand for nature-based tourism – increased visitor awareness of conservation, health, and safety, and associating nature experiences with wellbeing
- what nature travellers want and need.

Tourism and Events Queensland uses these strategies to influence and guide partners (government, trade, and industry), including by:

- helping the tourism sector design and deliver experiences that meet consumer expectations
- creating resources, including practical tools and case studies, for tourism operators
- providing mentoring and training programs
- developing consumer value propositions that include nature traveller insights and using them in its marketing.



The *Nature Traveller Sub-segment Strategy* also provides government tourism and environmental entities with an understanding of Queensland's nature-based tourism brand and visitor expectations. This can help in aligning government investment with visitor trends and expectations.

The Activate Ecotourism Infrastructure (Act Eco) funding initiative required applicants to demonstrate that proposed projects aligned with the *Nature-based Tourism Strategy 2021–2024*.

Clearer leadership of ecotourism is needed

Oversight of the various plans and strategies in place is generally at an entity level, limiting visibility across government on how ecotourism development is progressing. Relevant government entities partner with the tourism industry, Traditional Owners, and the community to support sustainable growth and deliver new ecotourism experiences. However, the respective roles of the entities involved in developing ecotourism, including the governance arrangements between them, could be clearer.

The government has now started to better define and reflect on its role in the tourism and ecotourism sector through the *Towards Tourism 2032 – Transforming Queensland's visitor economy future strategy* and implementation plan. But an overarching statewide policy position on ecotourism for both on and off protected areas would provide greater clarity on who is responsible for what. This would provide a framework to guide government entities and help them align their individual ecotourism-related strategies and plans, including the *Nature-based Tourism Strategy 2021–2024* and the draft *Ecotourism Plan for Queensland's Protected Areas 2023–2028*.

With the Department of Environment and Science leading the development of ecotourism in protected areas and the Department of Tourism, Innovation and Sport leading the development of ecotourism outside Queensland's protected areas, accountability and oversight would be easier to manage.

Program Control Group

A program was set up in 2018 for the Department of Tourism, Innovation and Sport in partnership with the Department of Environment and Science to explore opportunities for new nature-based and ecotourism experiences. This includes the delivery of the Queensland Ecotourism Trails projects (ecotourism experiences at iconic Queensland destinations, identified by government, including within or adjacent to national parks).

The Program Control Group was formed to assist the joint project team to deliver these projects and ensure a coordinated government approach to support expansion of nature-based and ecotourism opportunities across Queensland. The multi-agency Program Control Group is co-chaired by deputy directors-general of the Department of Tourism, Innovation and Sport and the Department of Environment and Science with members from the departments of Seniors, Disability Services and Aboriginal and Torres Strait Islander Partnerships; Resources; the Premier and Cabinet; State Development, Infrastructure, Local Government and Planning; and the Wet Tropics Management Authority.

The group was established to:

- oversee the delivery of specific state-led ecotourism projects
- provide policy input, strategic direction, and support for new strategies, plans, and programs that the state will deliver to support the expansion of nature-based and ecotourism opportunities across Queensland.

However, to date the Program Control Group has only overseen specific ecotourism projects, mainly the Queensland Ecotourism Trails projects that the state is leading (see Chapter 5). There is little evidence that the group is providing strategic direction to expand the overall ecotourism sector, including off-park opportunities.

Cross-agency working group review

In April 2022, Cabinet approved the establishment of a cross-agency working group (CAWG), chaired by the Department of the Premier and Cabinet, to review whole-of-government efforts on ecotourism projects. Its focus is around proposals adjacent to national parks that have the highest probability of being developed. The group has met 3 times, the last time being August 2022. It is unclear from available documentation what progress has been made.

Recommendation 3

We recommend the Department of Tourism, Innovation and Sport; the Department of Environment and Science; and Tourism and Events Queensland develop, finalise, or update individual plans that clearly define how they will achieve the government's vision of Queensland becoming a world leader in ecotourism, within their area of responsibility.

This includes:

- aligning individual ecotourism-related strategies and plans with the *Towards Tourism 2032 – Transforming Queensland's visitor economy future* strategy and the statewide policy position on ecotourism and ecotourism roadmap (once developed)
- developing investment priorities to ensure government funding is directed to/aligned with the vision and policy position on ecotourism
- using available information on nature visitor preferences for planning and prioritising ecotourism facilities, activities, and projects
- having clear goals, measurable indicators of success, and performance targets in all strategies and plans and regularly monitoring and reporting on progress.



5. Managing ecotourism in protected areas

This chapter is about how the Department of Environment and Science manages ecotourism facilities and activities in Queensland's protected areas.

The Department of Environment and Science manages the development and operation of ecotourism facilities and activities in protected areas in the following ways:

- evaluating, authorising, and managing proposals for ecotourism facilities
- licensing private tourism operators who provide ecotourism activities for visitors
- undertaking visitor and park management in Queensland's protected areas in line with best practice.

Processes for assessment and approval of ecotourism facilities in protected areas are robust but complex

Legislation passed in 2013 allowed for ecotourism facilities to be developed in protected areas. To operate an ecotourism facility in a protected area, the operator needs to obtain a lease under the *Nature Conservation Act 1992*.

Ecotourism facilities are designed and managed to facilitate the presentation, appreciation, and conservation of the land's natural condition and cultural resources and values. Facilities include walking trails, camping grounds, and eco-accommodation.

The Department of Environment and Science has a robust process for assessing and approving proposals for ecotourism facilities in protected areas. All proposals are evaluated against a set of statutory and merit-based assessment criteria. The statutory criteria are the legislative requirements provided in the *Nature Conservation Act 1992*, while the merit criteria focus on commercial aspects of proposals and suitability as tourism products at the location.

Lengthy and complex approval process

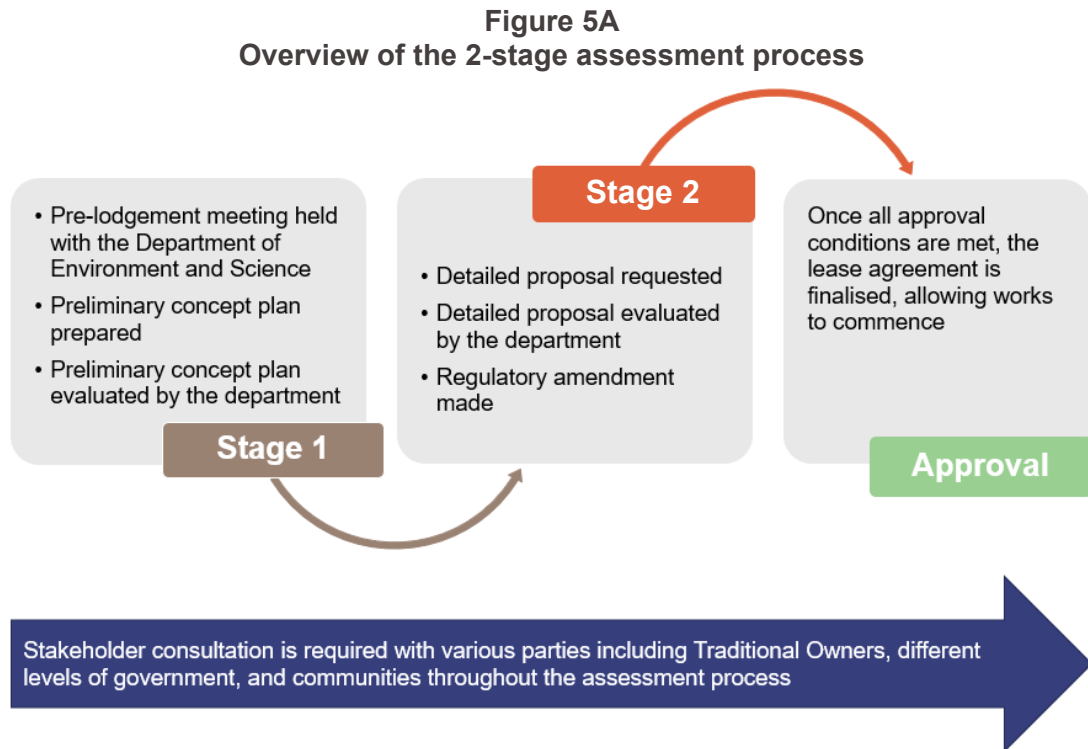
Protected areas are extremely important for biodiversity conservation including protecting threatened species and respecting the cultural and traditional ownership of First Nations people. Gaining government approval for ecotourism facilities in protected areas is complex and time consuming due to the need for greater environmental protections and to ensure the views and rights of Traditional Owners are respected.

Depending on the type of development, individual site characteristics, and tenure, proposals are subject to many approvals and authorities required under local, state, and Commonwealth legislation and planning frameworks. Individual projects face different challenges and complexities, such as the number of approvals needed and difficulties engaging with stakeholders. For example, one project had to comply with 15 different acts and codes, including the *Environment Protection and Biodiversity Conservation Act 1999* (Cth), the *Nature Conservation Act 1992* (Qld), the *Native Title Act 1993* (Cth), and various planning acts and regulations.

The process of assessing proposals for ecotourism facilities is rigorous, to ensure ecotourism within protected areas is undertaken with minimal environmental impact, managed sustainably, and done in partnership with Traditional Owners. It is important that the approval, planning, and delivery of ecotourism facilities ensures culturally appropriate outcomes for Traditional Owners. For many proponents, meeting these requirements is onerous and costly, and they decide not to proceed with their application.

Applicants are provided with detailed information and guidance, developed by the Department of Environment and Science, on delivering ecotourism facilities in national parks. This includes the *Implementation Framework: Ecotourism Facilities on National Parks* and *Best Practice Ecotourism Development Guidelines*.

The government uses a 2-stage process for assessing lease applications, as shown in Figure 5A.



Source: Compiled by the Queensland Audit Office using information provided by the audited entities.

The case study in Figure 5B gives an example of one of the first ecotourism projects in a Queensland national park. It took almost 6 years to obtain approval for this project. Comparison by the Department of Tourism, Innovation and Sport with 2 ecotourism facilities projects in other states shows that this time frame is not unusual. Both took 6 years or more, including 2 and 3 years respectively to undertake environmental studies and negotiate with Traditional Owners.



Figure 5B Case study 1 – Scenic Rim Trail project

Lengthy and complex approval process for ecotourism developments

Project overview

The Scenic Rim Trail provides walking experiences for visitors through private property and the remote mountains of Main Range National Park. It was built in partnership between the Queensland Government and a private ecotourism operator, selected through a competitive expression of interest process.

Project timeline

The Scenic Rim Trail project took almost 6 years, from the initial expression of interest in September 2013 to the final approval by the Department of Environment and Science (DES) in August 2019.

| | | |
|----------------|---|---|
| September 2013 | ● | Queensland Government called for expression of interest submissions to deliver ecotourism facilities. |
| August 2014 | ● | Detailed proposal launch meeting requested. |
| September 2014 | ● | Request for detailed proposal released. |
| July 2016 | ● | DES granted conditional approval of the preliminary concept proposal. |
| February 2018 | ● | Proponent submitted its detailed proposal to DES for assessment. |
| January 2019 | ● | DES approved the proponent's detailed proposal. |
| January 2019 | ● | Australian Government provided relevant approvals for the project. |
| August 2019 | ● | DES approved the proponent's application for an authority under s.34 of the <i>Nature Conservation Act 1992</i> . |
| September 2019 | ● | Proponent commenced approved works at the site. |
| June 2020 | ● | Proponent commenced its operations at the site. |

Challenges

The initial planning documents for the project indicated that the proponent was to submit its detailed proposal for the project within 3 months of the request being released. However, it took over 3 years for this to occur. As the first ecotourism facilities project, it took time for both the government and proponent to understand and navigate the legislative and planning processes, including local and federal government approvals. This included finding ways to better engage with Traditional Owners.

In 2015, a change in government led to a lengthy review of the ecotourism policy. This then delayed the government's approval of the project's preliminary proposal. Several changes to the proposal, including the method of waste disposal, affected the approval's time frames, particularly the Commonwealth approval, which took 2-and-a-half years to obtain.

The project had to meet several different approval requirements from various authorities. The proponent had to invest significant time, money, and effort in navigating these processes.

Source: Compiled by the Queensland Audit Office from information provided by the Department of Environment and Science.



Despite an expression of interest process for ecotourism facilities in protected areas in 2013, there was limited progress in advancing proposals through to construction between 2013 to 2017. The government commissioned 2 reviews of the expression of interest process. Both made recommendations, resulting in actions to simplify the development process for proponents. Improvements implemented include:

- Department of Tourism, Innovation and Sport managing the expression of interest and procurement processes and negotiations with Traditional Owners
- Department of Environment and Science being the assessor of Queensland Ecotourism Trails program
- developing assessment and leasing templates to assist with probity and transparency
- introducing a 2-stage process whereby only viable proponents progress to a full assessment.

In 2018, the Department of Tourism, Innovation and Sport and the Department of Environment and Science responded to the challenges faced by proponents by forming a Project Control Group to provide direct delivery support for ecotourism projects. The Program Control Group oversees the delivery of ecotourism projects in protected areas; regularly reviewing project status, delivery schedules, budgets, and overall risks.

With these projects, the government is leading key aspects of the assessment and approval processes, such as engaging with the Traditional Owners and coordinating all state and Commonwealth environmental approvals. However, while there have been some improvements in how government entities coordinate these processes, there are still some key issues and challenges. These include difficulties in managing stakeholder relationships including with Traditional Owners, and a lack of clarity about what the projects are trying to achieve. More recently, the Project Control Group has introduced independent reviews at key decision points of projects in development.

Five approved ecotourism facilities from 30 proposals

The Department of Environment and Science has considered 30 proposals for ecotourism facilities on or adjacent to protected areas in the last 10 years. Five of these were approved and completed – 3 in protected areas, and 2 in non-protected areas, but where the state is a trustee of the land. A further 2 facilities projects have been approved and are currently in development – Wangetti Trail (from Palm Cove to Port Douglas) and Cooloola Great Walk (from Noosa North Shore to Rainbow Beach). The department is also in advanced stages of assessing 7 more proposals for ecotourism facilities.

Figure 5C shows the status of the 30 proposals for ecotourism facilities considered by the Department of Environment and Science. We found no complete list of ecotourism proposals or projects government has considered outside of protected areas.



Figure 5C
Ecotourism facilities in Queensland

| | Protected area | Non-protected area | Protected and non-protected area | Total |
|--|----------------|--------------------|----------------------------------|-----------|
| Approved | 3 | 2 | - | 5 |
| In progress – under assessment | 7 | - | 2 | 9 |
| Not progressed – denied by government | 4 | 2 | 1 | 7 |
| Not progressed – withdrawn by proponent | 4 | - | 2 | 6 |
| Under investigation – initial consultation phase | 2 | - | 1 | 3 |
| Total | 20 | 4 | 6 | 30 |

Source: Compiled by the Queensland Audit Office from information provided by the Department of Environment and Science.

Figure 5D lists the 5 approved ecotourism facilities projects, including date of commencement and funding contributed by government. Additional investment is provided by the proponent.

Figure 5D
Five approved ecotourism facilities in Queensland

| Project | Project type | Land type | Began operating | Government funding contribution |
|--------------------------------------|--------------------------------------|--------------------|-----------------|---------------------------------|
| Mamu Tropical Skywalk | Skywalk | Protected area | March 2014 | \$10,000,000 |
| Spicers Scenic Rim Trail | Eco-accommodation and multi-day walk | Protected area | June 2020 | \$2,500,000 |
| O'Reilly's Campground | Eco-accommodation and multi-day walk | Protected area | September 2020 | \$1,210,000 |
| Walkabout Creek Adventures/Riverlife | Ecotourism experience | Non-protected area | September 2016 | Nil |
| East Trinity | Ecotourism Indigenous experience | Non-protected area | July 2021 | \$1,100,000 |

Source: Compiled by the Queensland Audit Office from information provided by the Department of Environment and Science and the Department of Tourism, Innovation and Sport.

Recommendation 4

We recommend the Department of Environment and Science, in consultation with the Department of Tourism, Innovation and Sport:

- consider ways to further reduce the complexity of obtaining government approvals for ecotourism facilities
- provide greater support to proponents in navigating the legislative, engagement, and approval processes for ecotourism facilities.

Completed ecotourism projects are monitored

Monitoring, evaluating, and reporting on activities are all critical in supporting the effective and efficient delivery of programs and in achieving the desired outcomes. The Department of Environment and Science and the Department of Tourism, Innovation and Sport have established appropriate processes and practices for overseeing completed ecotourism projects.

Assurance framework in place to guide monitoring and reporting

In 2021, the 2 departments developed a framework to guide the monitoring, evaluating, and reporting of the ecotourism program – the *Queensland Ecotourism Program Assurance Framework*.

In March 2022, the Department of Environment and Science conducted an annual review of the 3 completed ecotourism projects in line with the assurance framework. Overall, the review highlighted that the projects' operators had demonstrated appropriate compliance with the conditions of the leases.

Providing ecotourism in national parks

Queensland's protected areas, including national parks and forests, underpin the state's nature-based tourism industry, attracting millions of international and domestic visitors each year. The Department of Environment and Science manages all aspects of protected areas, in partnership with Traditional Owners, including identifying and providing sustainable nature-based recreation and tourism, while respecting the importance of the First Nations culture and heritage.

The department's investment includes upgrading visitor facilities and improving visitor experiences in the state's more popular and highly visited national parks. The department also delivers different ecotourism products and experiences through social media, digital communication tools, and Gateway Visitor Centres. These centres deliver conservation education and experiences to visitors.

Ecotourism activities

Licensed tourism operators can provide ecotourism activities on protected areas. In addition to camping, certain activities affecting Queensland's parks and forests need a permit. These activities include recreational and commercial tours; scientific or educational research; filming and photography; and organised events such as trail running, climbing, and canoeing.

Tourism operators wanting to conduct commercial activities in Queensland's national parks need to apply and be approved for a commercial activity permit or agreement authorised by the Department of Environment and Science. There are currently 488 commercial permits or agreements in national parks, with 309 of those for guided tours.

The permit system ensures that the management of protected areas and their use is ecologically sustainable. Permits are required so that the department can regulate aspects of where, what, and when activities occur, and to what extent.

Operators who obtain a permit are required to submit a return of operations on a regular basis. This includes visitor numbers used to determine daily site fees payable for each visitor on the commercial tour.



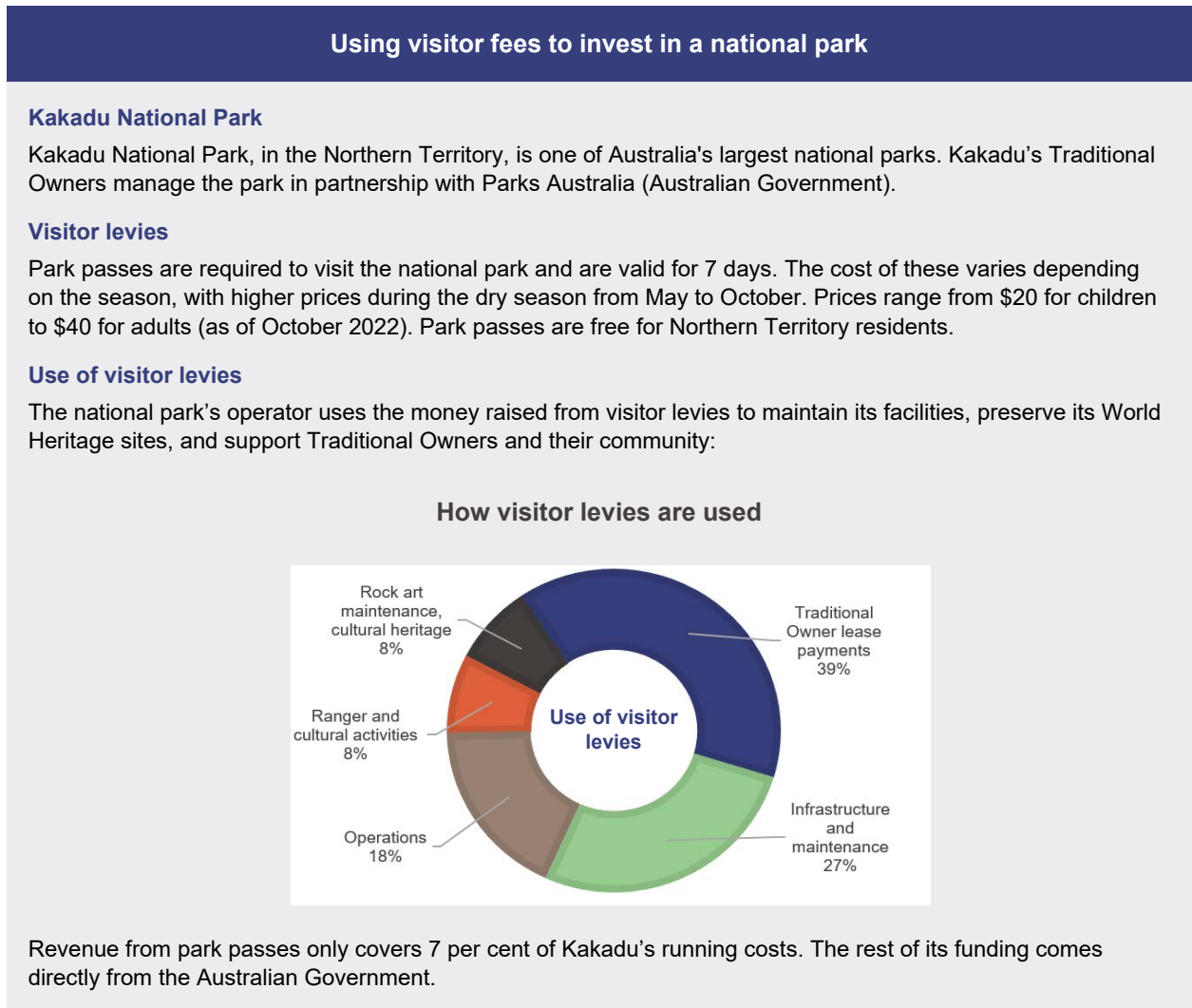
Park access fees can help fund ecotourism

While Queensland charges fees for camping, entry to Queensland’s national parks is free. All Australian jurisdictions except Queensland and Victoria charge a fee for visiting national parks. Park access fees can be a source of additional funding and income for national parks to help subsidise infrastructure maintenance and operations. They include seasonal passes or other ‘day use’ fees.

The government-appointed Tourism Industry Reference Panel, in its *Towards 2032 – Reshaping Queensland’s visitor economy to welcome the world* report, recommended the state consider new mechanisms to obtain additional funding to support and grow the visitor economy. This included introducing fees and charges to recoup running costs and to be reinvested in our national parks and protected areas. Government has committed to investigating revised fee regimes for protected area access by 2026. However, any proposal to charge users to access national parks in Queensland requires legislative amendment, which the government has not previously supported.

Figure 5E provides an example of how one Australian jurisdiction charges visitor fees for a national park and reinvests the funds received into the park.

Figure 5E
Case study 2 – Kakadu National Park



Source: Compiled by the Queensland Audit Office using information from Parks Australia.



Appendices

| | | |
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A. Entity responses

As mandated in Section 64 of the *Auditor-General Act 2009*, the Queensland Audit Office gave a copy of this report with a request for comments to the Department of Environment and Science; the Department of Tourism, Innovation and Sport; and Tourism and Events Queensland.

This appendix contains their detailed responses to our audit recommendations.

The heads of the entities are responsible for the accuracy, balance, and fairness of their responses.



Comments received from Minister for Tourism, Innovation and Sport and Minister Assisting the Premier on Olympics and Paralympics Sport and Engagement



Minister for Tourism, Innovation and Sport and
Minister Assisting the Premier on Olympics
and Paralympics Sport and Engagement

Our ref: CTS 05164/23
Your ref: PRJ02073

Mr Brendan Worrall
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Dear Mr Worrall

Thank you for your email of 24 March 2023 and subsequent meeting on 14 April 2023, regarding your report titled *Growing ecotourism in Queensland*. I acknowledge Mr Andrew Hopper, Director-General, Department of Tourism, Innovation and Sport (DTIS) has provided a response to the report recommendations and outlined DTIS' support and approach to implementing the recommendations.

Protecting and presenting Queensland's exceptional natural assets is critical to maintaining our attractiveness and competitiveness as a global tourism destination on the Green and Gold Runway towards the Brisbane 2032 Olympic and Paralympic Games. With visitors world-wide increasingly seeking genuine nature-based recreation and transformational experiences in nature, ecotourism provides a significant opportunity and competitive advantage to showcase Queensland's natural beauty in a sustainable and regenerative way.

This is why the Queensland Government's *Towards Tourism 2032 (TT2032)* tourism industry strategy prioritises the opportunity for the state to become a global leader in sustainable tourism and ecotourism experiences and seeks to support a thriving nature-based tourism sector that balances tourism development with environmental preservation, protection and interpretation.

To achieve this ambitious vision for the future of ecotourism in Queensland, the Queensland Audit Office report recognises opportunities to further define and improve effectiveness in developing sustainable ecotourism in Queensland. I am pleased to note DTIS' immediate progress in implementing key ecotourism-related actions under *TT2032* including the Activate Ecotourism Infrastructure funding initiative to develop new nature-based tourism experiences adjacent to protected areas, and the Eco-certified Tourism Destination Program helping to position Queensland to become a leader in sustainable tourism and leverage the growth potential in nature-based tourism experiences.

Under the *TT2032* strategy, we have also established a whole-of-government committee to review aspects of ecotourism and consider the most effective legislation, policy and implementation frameworks, guidelines and approvals processes. This early action places DTIS on a strong trajectory towards addressing the report's recommendations and supporting a thriving ecotourism sector in Queensland. DTIS will continue to work closely across government and industry to position Queensland ecotourism for future success in the lead up to and beyond 2032.

If you require any further information, please contact [REDACTED]

Yours sincerely

STIRLING HINCHLIFFE MP
Minister for Tourism, Innovation and Sport and
Minister Assisting the Premier on Olympics
and Paralympics Sport and Engagement

4 May 2023



Comments received from Director-General, Department of Environment and Science



Department of
Environment and Science

Our Ref: CTS 05224/23
Your Ref: PRJ02073

12 April 2023

Mr Brendan Worrall
Auditor-General
Queensland Audit Office
PO Box 15396
CITY EAST QLD 4002

Dear Mr Worrall

Thank you for your email of 24 March 2023 regarding the proposed report to Parliament titled *Growing ecotourism in Queensland*.

The Department of Environment and Science (DES) welcomes the report, its findings and recommendations, and has completed the formal response as requested (attached).

DES works with the Department of Tourism, Innovation and Sport (DTIS) and other agencies to implement tourism projects and supports an overarching Queensland Government policy position regarding ecotourism to provide clarity and a unified direction for future projects and investment.

DES is committed to providing ecotourism opportunities within protected areas and will implement the priority areas and associated actions outlined in the Ecotourism Plan for Queensland's Protected Areas 2023-2028. I also acknowledge the role the Queensland Government's Ecotourism Cross-Agency Working Group can play in advancing the recommendations identified in *Growing ecotourism in Queensland*.

On behalf of DES, I would like to thank the Queensland Audit Office for its detailed review. We look forward to continuing to work across government to advance ecotourism in Queensland.

Should your officers require any further information, they may contact [REDACTED]

Yours sincerely

A handwritten signature in black ink, appearing to read "Jamie Merrick".

Jamie Merrick
Director-General

Encl. (1)

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Responses to recommendations



Department of Environment and Science

Growing ecotourism in Queensland

Response to recommendations provided by Jamie Merrick, Director-General, Department of Environment and Science on 12 April 2023.

| Recommendation | Agree/ Disagree | Timeframe for implementation (Quarter and financial year) | Additional comments |
|--|-----------------|---|--|
| <p>1. We recommend that the Department of Tourism, Innovation and Sport and the Department of Environment and Science, in consultation with the Department of the Premier and Cabinet, develop an overarching state-wide policy position on ecotourism for both on and off protected areas that:</p> <ul style="list-style-type: none"> clearly defines ecotourism, and the scales and types of ecotourism development acceptable to the state identifies the state's priorities for ecotourism opportunities both on and off protected areas. This should include any differences in priorities and tolerances for developments within and outside national parks sets a clear direction for achieving the vision of Queensland becoming a world leader in ecotourism, providing improved consistency and clarity for government entities, industry operators and potential developers in understanding and implementing government's ecotourism priorities. | Agree | Q2 2024/2025 | <p>The Department of Environment and Science (DES) recognises the benefit of a state-wide policy position regarding ecotourism and the involvement of a central agency to coordinate consultation.</p> <p>DES notes that the Cross Agency Working Group (CAWG), chaired by Department of Premier and Cabinet, is an appropriate mechanism to progress this work.</p> |
| <p>2. Following the development of a state-wide policy position on ecotourism, we recommend that the Department of Environment and Science leads the implementation of ecotourism in protected areas through their <i>Ecotourism Plan for Queensland's Protected Areas 2023-2028</i>.</p> | Agree | Q1 2023/2024 to Q4 2027/2028 | <p>DES will lead the implementation plan associated with the Ecotourism Plan for Queensland's Protected Areas 2023-2028 (EPPA) and coordinate reporting on the progress of actions.</p> |



| Recommendation | Agree/ Disagree | Timeframe for implementation (Quarter and financial year) | Additional comments |
|---|--------------------|--|---|
| <p>3. We recommend the Department of Tourism, Innovation and Sport, the Department of Environment and Science; and Tourism and Events Queensland develop, finalise, or update individual plans that clearly define how they will achieve the government's vision of Queensland becoming a world leader in ecotourism, within their area of responsibility.</p> <p>This includes:</p> <ul style="list-style-type: none"> aligning individual ecotourism-related strategies and plans with the <i>Towards Tourism 2032 – Transforming Queensland's visitor economy future</i> strategy and the state-wide policy position on ecotourism and ecotourism roadmap (once developed) developing investment priorities to ensure government funding is directed to/aligned with the vision and policy position on ecotourism using available information on nature visitor preferences for planning and prioritising ecotourism facilities, activities, and projects having clear goals, measurable indicators of success and performance targets in all strategies and plans and regularly monitoring and reporting on progress. | <p>Agree</p> | <p>Subject to implementation of recommendations 1 and 2.</p> | <p>The implementation plan and reporting associated with the EPPA will include a narrative explaining how the objectives and actions implemented contribute to the government's vision of Queensland becoming a world leader in ecotourism.</p> <p>DES also notes the CAWG has identified investment attraction as one of the key areas of priority to pursue for ecotourism.</p> <p>Based on visitor trends and park visitation, DES is investing significantly in facilities to enhance the visitor experience in priority locations. Progress will be reported through the EPPA.</p> |



| Recommendation | Agree/ Disagree | Timeframe for implementation (Quarter and financial year) | Additional comments |
|---|--------------------|--|---|
| <p>4. We recommend the Department of Environment and Science, in consultation with the Department of Tourism, Innovation and Sport:</p> <ul style="list-style-type: none"> consider ways to further reduce the complexity of obtaining government approvals for ecotourism facilities provide greater support to proponents in navigating the legislative, engagement and approval processes for ecotourism facilities. | <p>Agree</p> | <p>Subject to implementation of Recommendation 1 and subject to further consideration by government and progress by the CAWG. Q4 2024/2025</p> | <p>DES acknowledges this recommendation and has supported processes to reduce complexity while ensuring strong environmental, cultural heritage and governance remains.</p> <p>The Queensland and Australian Government legislative requirements and consultation processes provide important protections for threatened species and habitats.</p> <p>Significant focus is being placed on facilitating ecotourism facilities, adjacent to protected areas, which helps to mitigate impacts, provides greater certainty for investors and offers faster pathways for approvals.</p> <p>DES will work with DTIS to provide improved information and support to proponents in navigating the approvals process.</p> <p>DES notes a dedicated Planning and Regulation Working Group is being established under the Queensland Government's Tourism Inter-Departmental Committee and will engage with the working group in progressing this recommendation.</p> |



Comments received from Director-General, Department of Tourism, Innovation and Sport

Our reference: CTS 05164/23
Your reference: PRJ02073



Department of
Tourism, Innovation and Sport

28 April 2023

Mr Brendan Worrall
Auditor-General
Queensland Audit Office
qao@qao.qld.gov.au

Dear Mr Worrall

Thank you for your email of 24 March 2023, and subsequent meeting on 14 April 2023 regarding your proposed report to Parliament titled *Growing ecotourism in Queensland*.

The Department of Tourism, Innovation and Sport (DTIS) welcomes the findings of the report and the identified opportunities to improve effectiveness in developing sustainable ecotourism in Queensland. The report provides valuable information to focus forward efforts and priorities across government, and DTIS is pleased to accept the recommendations. Please find DTIS' response to each of the recommendations enclosed.

The Queensland Government's *Towards Tourism 2032* tourism industry strategy recognises the opportunity for the state to become a global leader in sustainable tourism and ecotourism experiences, identifying initial ecotourism related actions and commitments over the first implementation phase. DTIS is committed to continuing to work across government and with industry to achieve the right balance between conservation and sustainable economic development and tourism growth. Achieving this balance is essential in supporting a thriving ecotourism sector while ensuring a long-term focus on environmental protection.

DTIS supports further clarity from development of an overarching Queensland Government policy position on ecotourism within the state. This will provide clearer direction in aligning and implementing ecotourism planning, development and investment priorities and deliver greater certainty for government and industry. DTIS recognises the need for close collaboration between relevant agencies, and the benefit of strong central agency leadership in developing and confirming the state-wide policy position for ecotourism both on and off protected areas.

Also supported are the recommendations to continue to strengthen approaches to facilitate private investment in ecotourism, identify and prioritise ecotourism projects, and support proponents to navigate approval processes. I am pleased to note that the Queensland Government's Ecotourism Cross-Agency Working Group has already identified investment attraction and planning / development streamlining as key areas of priority to pursue. Implementation of these recommendations and priorities will be closely informed and driven by firstly developing a state-wide policy position on ecotourism.

DTIS thanks the Queensland Audit Office for their detailed review, insight, and recommendations, and has valued the opportunity to provide information and input throughout the process.

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2.

DTIS looks forward to continuing to work collaboratively across government to support a thriving nature-based tourism sector that balances tourism development with environmental preservation, protection and interpretation.

Yours sincerely



Andrew Hopper
Director-General

Encl.

Responses to recommendations



Department of Tourism, Innovation and Sport

Growing ecotourism in Queensland

Response to recommendations provided by Mr Andrew Hopper, Director-General, Department of Tourism, Innovation and Sport (DTIS) on 26 April 2023

| Recommendation | Agree/ Disagree | Timeframe for implementation (Quarter and financial year) | Additional comments |
|---|-----------------|---|---|
| <p>1. We recommend that the Department of Tourism, Innovation and Sport and the Department of Environment and Science, in consultation with the Department of the Premier and Cabinet, develop an overarching state-wide policy position on ecotourism for both on and off protected areas that</p> <ul style="list-style-type: none"> clearly defines ecotourism, and the scales and types of ecotourism development acceptable to the state identifies the state's priorities for ecotourism opportunities both on and off protected areas. This should include any differences in priorities and tolerances for developments within and outside national parks sets a clear direction for achieving the vision of Queensland becoming a world leader in ecotourism, providing improved consistency and clarity for government entities, industry operators and potential developers in understanding and implementing government's ecotourism priorities. | Agree | Q2 2024/2025 (subject to required consultation processes and consideration by Government) | <p>DTIS recognises the need for close consultation and strong leadership from a central agency perspective to inform and ensure a whole-of-government policy position is reached.</p> <p>DTIS notes the potential role of the Ecotourism Cross-Agency Working Group (CAWAG) (chaired by the Department of the Premier and Cabinet) in leading implementation of Recommendation 1.</p> |
| <p>2. Following the development of a state-wide policy position on ecotourism, we recommend that the Department of Tourism, Innovation and Sport leads the development and implementation of an ecotourism roadmap for Queensland (aligned under the <i>Towards Tourism 2032 – Transforming Queensland's visitor economy future strategy</i>), with a focus on supporting private investment and development in ecotourism outside Queensland's protected areas.</p> | Agree | Subject to implementation of Recommendation 1 | <p>Requires agreed state-wide policy position on ecotourism prior to progression.</p> <p>Likely to form a key action under Phase 2 of <i>Towards Tourism 2032</i> implementation (2026-2028).</p> |



| Recommendation | Agree/ Disagree | Timeframe for implementation (Quarter and financial year) | Additional comments |
|---|--------------------|--|---|
| <p>3. We recommend the Department of Tourism, Innovation and Sport; the Department of Environment and Science; and Tourism and Events Queensland develop, finalise, or update individual plans that clearly define how they will achieve the government's vision of Queensland becoming a world leader in ecotourism, within their area of responsibility.</p> <p>This includes:</p> <ul style="list-style-type: none"> aligning individual ecotourism-related strategies and plans with the <i>Towards Tourism 2032 – Transforming Queensland's visitor economy future</i> strategy and the state-wide policy position on ecotourism and ecotourism roadmap (once developed) developing investment priorities to ensure government funding is directed to/aligned with the vision and policy position on ecotourism using available information on nature visitor preferences for planning and prioritising ecotourism facilities, activities, and projects having clear goals, measurable indicators of success and performance targets in all strategies and plans and regularly monitoring and reporting on progress. | <p>Agree</p> | <p>Subject to implementation of Recommendations 1 and 2</p> | <p>DTIS notes that the Ecotourism Cross-Agency Working Group (CAWG) has identified investment as one of the key areas of priority to pursue for ecotourism.</p> <p>In line with this priority, a dedicated Infrastructure Facilitation and Investment Working Group is being established under the Queensland Government's Tourism Inter-Departmental Committee.</p> <p>This Working Group may be an appropriate forum through which ecotourism investment priorities under Recommendation 3 can be considered.</p> |



| Recommendation | Agree/ Disagree | Timeframe for implementation (Quarter and financial year) | Additional comments |
|---|--------------------|--|--|
| <p>4. We recommend the Department of Environment and Science, in consultation with the Department of Tourism, Innovation and Sport:</p> <ul style="list-style-type: none"> consider ways to further reduce the complexity of obtaining government approvals for ecotourism facilities provide greater support to proponents in navigating the legislative, engagement and approval processes for ecotourism facilities. | <p>Agree</p> | <p>Subject to implementation of Recommendation 1 (and consideration by Government)</p> | <p>The Department notes that the Ecotourism Cross-Agency Working Group (CAWG) has identified planning / development streamlining as one of the key areas of priority to pursue for ecotourism.</p> <p>In line with this priority, a dedicated Planning and Regulation Working Group is being established under the Queensland Government's Tourism Inter-Departmental Committee.</p> <p>This Working Group may be an appropriate forum through which ecotourism facility approvals under Recommendation 4 can be considered.</p> |

Comments received from Chief Executive Officer, Tourism and Events Queensland

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26 April 2023

Brendan Worrall
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QAO.Mail@qao.qld.gov.au

Dear Mr Worrall

Thank you for your email of 24 March 2023 providing the proposed report to Parliament titled *Growing ecotourism in Queensland*, and the subsequent email from Queensland Audit Office on 24 April 2023 which outlined further changes to the report. I have considered the proposed report and its findings and welcome the suggestions put forward to enhance the progression of sustainable ecotourism in Queensland.

As noted in the report, Tourism and Events Queensland's (TEQ) *Nature-based Tourism Strategy 2021-2024* guides TEQ in creating demand and generating sustainable growth in nature-based tourism and ecotourism. Ecotourism is seen as an important part of the nature-based tourism spectrum, providing immersive engagement in nature to guests as well as integrating elements of appreciation and environmental conservation.

TEQ is committed to continuing to work with the Queensland tourism industry and broader Government through the delivery of experiences that meet the nature travellers' needs and promotion of Queensland's natural and cultural wonders.

TEQ supports the development of a Whole of Government comprehensive ecotourism policy, which will offer greater clarity and guide related initiatives in the state. This will provide a clear position for ecotourism development both on and off protected areas. It will also allow TEQ to align future strategies and plans, including future Nature-based Tourism strategies with *Towards Tourism 2032* and the overarching policy position to help achieve the vision of Queensland becoming a world leader in ecotourism.

TEQ's detailed response is enclosed and addresses the recommendation you have identified for consideration. Thank you again for your letter and the Queensland Audit Office's ongoing work with TEQ.

Yours sincerely,



Patricia O'Callaghan
Chief Executive Officer

Encl.



B. Audit scope and methods

Performance engagement

This audit was performed in accordance with the *Auditor-General Auditing Standards* – December 2019 and the Standard on Assurance Engagements ASAE 3500 *Performance Engagements*, issued by the Auditing and Assurance Standards Board. This standard establishes mandatory requirements and provides explanatory guidance for undertaking and reporting on performance engagements.

The conclusions in our report provide reasonable assurance that we have achieved the objectives of our audit. Our objectives and criteria are set out below.

Audit objective and scope

The objective of the audit was to examine whether the state’s tourism and environmental entities are effectively developing sustainable ecotourism in Queensland. We addressed this through the following sub-objectives and criteria.

| Sub-objective 1: | | | |
|---|--|--------------------------|---|
| Entities are driving innovation and investment in ecotourism and promoting visitor experiences | | | |
| Criteria | | Detailed criteria | |
| 1.1 | Entities have developed and implemented plans to drive investment and innovation for sustainable ecotourism goals. | 1.1.1 | Entities have developed ecotourism plans that clearly articulate how government policies, programs, and services will be implemented and delivered on time, on budget, and to expectations. |
| | | 1.1.2 | Entities seek and consider the views of key stakeholders, including industry groups and Traditional Owners, in developing ecotourism strategies and plans. |
| | | 1.1.3 | Funding arrangements, including any shared funding arrangements, are clearly defined, and held to account. |
| 1.2 | Entities attract investment and drive innovation in ecotourism experiences. | 1.2.1 | Entities work with the tourism industry and primary partners, including Traditional Owners, to identify and progress low-impact, viable ecotourism opportunities. |
| | | 1.2.2 | Entities provide tourism operators, developers, and investors with knowledge, guidelines, and support on developing ecotourism products, including the regulatory process. |
| 1.3 | Entities promote, attract, and support visitor experiences. | 1.3.1 | Entities build Queensland’s competitive position and market share by driving awareness of ecotourism and converting consumers. |
| | | 1.3.2 | Entities advance innovation in visitor experience delivery to meet consumer demand. |
| | | 1.3.3 | Entities utilise insights, research, and analysis into global economic impacts, market trends, and consumer behaviour to inform decision-making. |



Sub-objective 2:
Entities conserve and maintain protected areas while allowing for contemporary ecotourism developments that both showcase and preserve Queensland’s protected areas

| Criteria | Detailed criteria |
|--|---|
| 2.1 The Department of Environment and Science assesses and approves authorities for ecotourism in line with legislative requirements and contemporary assessment criteria. | 2.1.1 The Department of Environment and Science manages, evaluates, and authorises ecotourism proposals in accordance with legislative requirements, and best practice and merit criteria. |
| | 2.1.2 The Department of Environment and Science undertakes appropriate public consultation with Traditional Owners, communities, and key stakeholders as part of the assessment and approval process. |
| 2.2 The Department of Environment and Science monitors and reviews compliance with authority conditions and takes appropriate action when needed. | 2.2.1 Authorities granted for ecotourism facilities are performance based and hold the lessee accountable for delivering on authority conditions. |
| | 2.2.2 The Department of Environment and Science monitors and reviews compliance with authority conditions through a range of assessment, compliance, investigation, and enforcement activities. |

Sub-objective 3:
Statewide coordination and governance of ecotourism goals and activities operates effectively, and entities monitor and report on outcomes

| Criteria | Detailed criteria |
|---|--|
| 3.1 Entities operate an effective governance framework and supporting processes that provide appropriate oversight and scrutiny of the implementation of ecotourism strategies, plans, and initiatives. | 3.1.1 The governance arrangements between and within entities involved in the implementation of ecotourism strategies and plans are appropriately formalised and documented, including clear roles and responsibilities. |
| | 3.1.2 Entities effectively coordinate effort to jointly manage activities and achieve goals. |
| 3.2 Entities monitor, measure, and report on how ecotourism strategies, plans, and initiatives are performing. | 3.2.1 Governance arrangements provide for adequate reporting and review mechanisms, including regular updates of risk assessments. |
| | 3.2.2 Entities have identified benefits and developed measures of success, including evidence-based performance targets, and regularly report against them. |
| 3.3 Entities evaluate actions and revise where appropriate. | 3.3.1 Entities periodically evaluate their ecotourism strategies, plans, and initiatives to ensure they are working as intended and achieving desired outcomes. |
| | 3.3.2 Entities revise and update their strategies and plans based on lessons learned. |



The entities we audited

We included the following entities in the scope of this audit:

- Department of Environment and Science
- Department of Tourism, Innovation and Sport
- Tourism and Events Queensland.

We did not include local councils.

We met with the following stakeholders to gain their insights and perspectives on ecotourism in Queensland:

- Queensland Tourism Industry Council
- Ecotourism Australia
- Turner Family Foundation.



C. Overnight visitor expenditure by Queensland regions

Figure C1 shows the total overnight visitor expenditure by Queensland regions for the years 2018–19 and 2021–22.

Figure C1
Overnight visitor expenditure – domestic and international

| Region | 2018–19 | | 2021–22 | |
|-----------------------------|-----------------|----------------|-----------------|----------------|
| | Value \$ (bil.) | Percentage (%) | Value \$ (bil.) | Percentage (%) |
| Brisbane | 7.6 | 30.7 | 4.6 | 22.5 |
| Gold Coast | 5.1 | 20.6 | 3.4 | 16.7 |
| Tropical North Queensland | 3.3 | 13.3 | 3.2 | 15.7 |
| Sunshine Coast | 2.9 | 11.7 | 3.0 | 14.7 |
| Southern Great Barrier Reef | 1.3 | 5.2 | 1.4 | 6.9 |
| Townsville | 1.0 | 4.0 | 0.8 | 3.9 |
| Southern Queensland Country | 0.9 | 3.6 | 0.9 | 4.4 |
| Whitsundays | 0.8 | 3.2 | 1.3 | 6.4 |
| Outback Queensland | 0.8 | 3.2 | 0.6 | 2.9 |
| Mackay | 0.6 | 2.4 | 0.5 | 2.5 |
| Fraser Coast | 0.4 | 1.6 | 0.6 | 2.9 |
| Others | 0.1 | 0.5 | 0.1 | 0.5 |
| Total | 24.8 | | 20.4 | |

Source: Compiled by the Queensland Audit Office using information from international and national visitor surveys conducted by Tourism Research Australia.





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