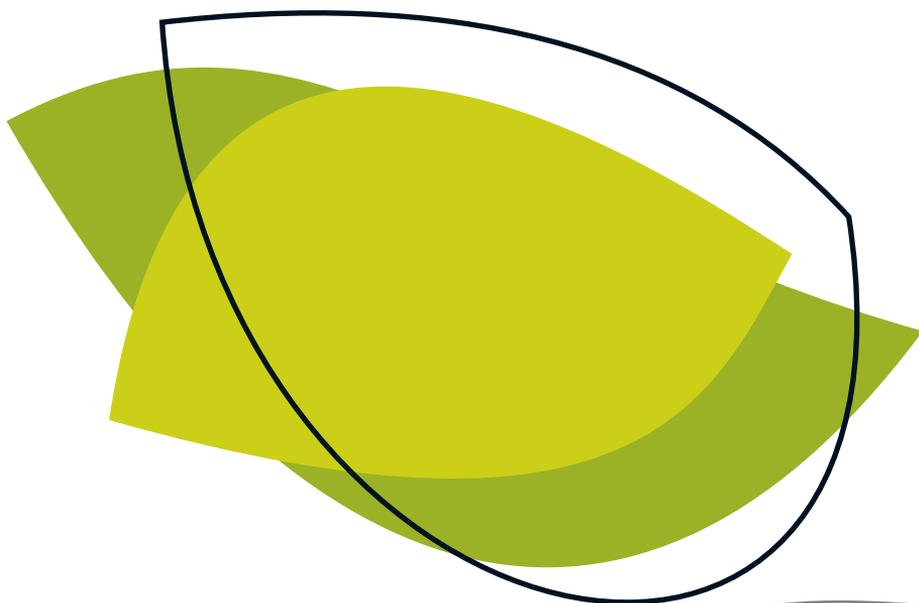# steps to sustainable tourism

planning a sustainable future for tourism, heritage and the environment

Australian Government

Department of the Environment and Heritage

steps to
sustainable
tourism

planning a
sustainable
future for tourism,
heritage and
the environment

*a tool to use when managing
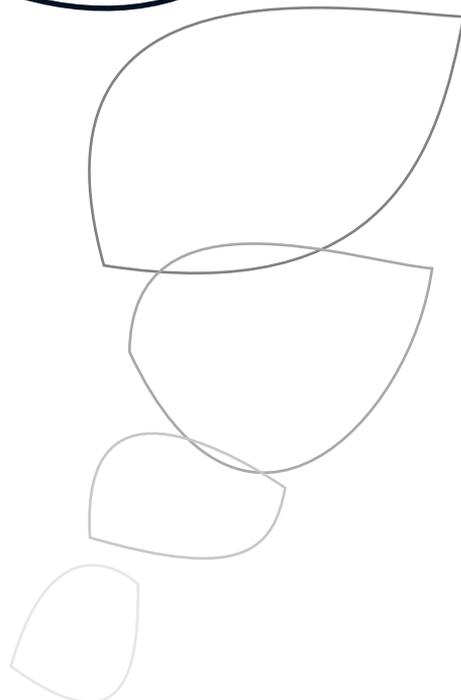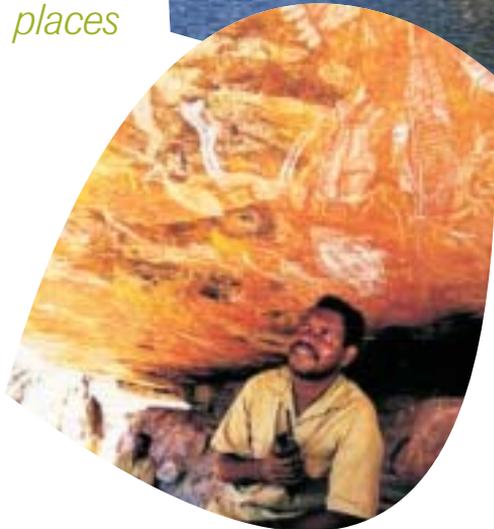and developing regions, places
and tourism products*

Foreword

Steps to Sustainable Tourism has been developed with the assistance of the tourism industry, academics and heritage managers.

It offers a step-by-step approach to foster partnerships and to achieve benefits for tourism and conservation interests. Conservation of our environment and heritage (including natural, historic and Indigenous places) as well as economic and community development are important sustainability goals. *Steps* endeavours to find a common language between conservation, management and a business approach.

'*Australia's natural and cultural heritage sites are fundamental to Australia's global tourism appeal. Australia can offer visitors a unique experience of our extraordinary landscapes, history and culture.*

TTF Australia has worked closely with the Australian Government's Department of the Environment and Heritage in the development of Steps to Sustainable Tourism *to provide a practical tool for protecting and presenting areas.*

We recommend the document and approach to all those involved in managing and developing regions, places and tourism products and look forward to seeing Steps *in action for a sustainable future.*'

Christopher Brown
Managing Director & CEO
TTF Australia

TTF
AUSTRALIA
Tourism & Transport Forum

Contents

WELCOME

Sustainable tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems.

World Tourism Organisation

Welcome to *Steps to Sustainable Tourism*. This document is designed for tourism operators, heritage and environment managers, community groups and others with an interest in places, regions and associated tourism products. The approach outlined in the following pages, fosters a mutual understanding of issues and shows how to work together to achieve a range of sustainable benefits for tourism, communities, the environment and heritage.

Steps refers often to our *environment* and *heritage* so it may be useful to clarify what we mean by these terms. *Environment* refers to ecosystems, and also to cultural qualities and characteristics of places. *Heritage* embraces our natural, Indigenous and historic inheritance — what we think our descendants should, and would want to, inherit. Generally, these two terms are interchangeable.

Environment and heritage are valued differently by different people. Those working in tourism recognise them as assets of mainstream and niche tourism products and are in a position to do much to educate visitors about the values of our natural and cultural heritage places.

The underlying principle of this guide is the need to recognise and protect the values of our special natural and cultural places in order to enhance tourism product development and the management of places in the long term.

Achieving sustainable tourism requires motivation, determination and a systematic approach. *Steps* offers a tool or process to assist in this task which has been developed and tested in partnership with both tourism and heritage interests. The process, set out in 10 steps, integrates the needs of tourism, the environment and heritage when developing a tourist destination, a tourism product or managing a place.

Its core is proper planning. The 10 steps form an entire planning process that can be applied from start to finish, or can be used in part if more appropriate. It can be followed in large planning exercises such as a 'big picture' regional planning process or by small interest groups or individuals wanting to promote a single attraction. Following these steps thoroughly will assist you meet the needs of the visitor, the environment, business and the local community. There can be a sustainable future for them all.

The Australian Government Department of the Environment and Heritage developed the *Steps* approach based on established strategic planning principles, and specialist experience and advice from people working in environment, heritage and tourism planning. The approach advocated is designed to be flexible and can be adapted as it is applied to many and varied situations.

Steps has been designed as a practical tool and pilot projects will be actively sought to further refine this first edition. Feedback from these pilot projects will assist in developing the second edition, as it is important to learn from people on the ground who are working towards sustainable tourism.

An adapted version of this document, *Stepping Stones to Tourism*, is currently being developed for Indigenous communities.

Follow these steps thoroughly and you will be well on the way to meeting the needs of the visitor, the tourism businesses, the environment and the local community for the benefit of all, both now and in the future.

Who is this guide for?

This guide can be used by tourism operators, local government, tourism organisations, heritage managers, regional development bodies, park managers, communities, consultants and all those interested in fostering a sustainable approach to tourism.

How can it be used?

The 10 steps can be used in many different ways. They can help to:

- develop audits, scoping projects and preliminary assessments of tourism development potential in regions
- identify tourism and heritage issues which need to be considered in management, regional or business planning
- develop regional heritage and tourism strategic plans and action plans
- assist in developing business plans for new or existing heritage tourism products
- foster more effective planning for infrastructure development at heritage places
- evaluate options and establish a stronger business case for an idea or proposal.
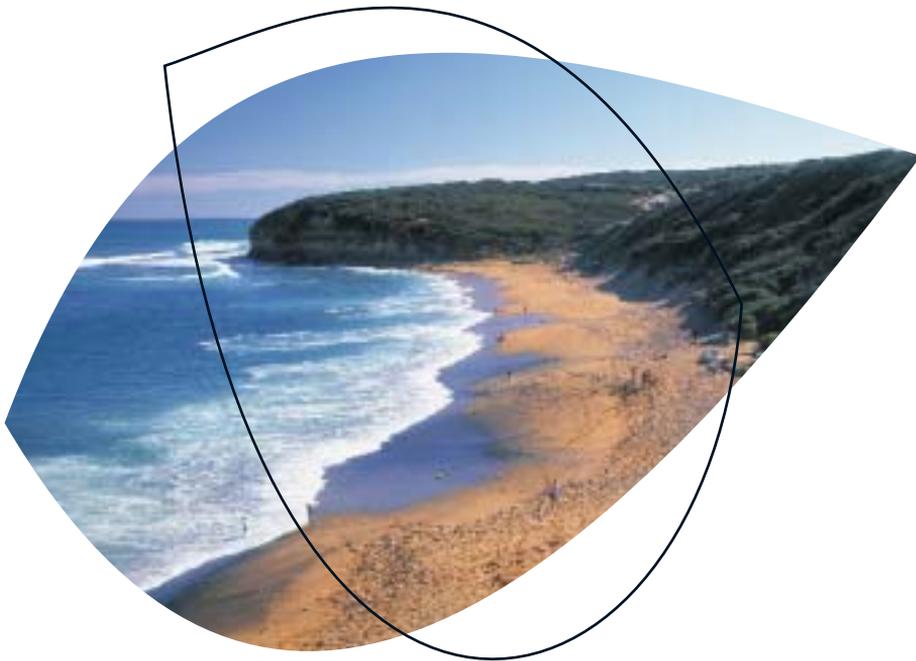
A natural and cultural haven — Bell's Beach, Victoria.
Photo: John Baker. Copyright: Department of the Environment and Heritage.

The steps can be used by:

Tourism operators	*to improve existing tourism products or identify opportunities for new products. Following the steps can help to build stronger relationships with land and heritage managers and communities*
Local government	*to develop plans for strategic development of local or regional tourism, and to help develop particular projects*
Tourism businesses	*to improve awareness of sustainable tourism issues among staff, in developing business plans and assist in streamlining development and approvals processes*
Tourism organisations	*to identify new nature or heritage based tourism development opportunities and check that sustainable tourism policies are being advanced throughout their areas of interest*
Park managers	*to help establish communication links and partnerships with tourism interests*
Community groups	*to consider the costs and benefits of tourism for their region*
Cultural heritage agencies and attraction managers	*to ensure that cultural heritage places are effectively managed as a tourism resource and that visitor management programs are sustainable. The framework can assist in developing briefs for projects at visited heritage places*
Indigenous community or enterprise	*to hold community meetings and discussions to chart a course for steps to follow*
Regional development organisations	*to check whether sustainable tourism issues have been addressed adequately in regional plans*
Interpretation officers	*to explore new options for presenting a place through sound decision-making steps*
Everyone	*to get together to discuss issues and develop common aims for long-term future benefit*

What are the benefits?

The primary benefit of this guide is that it offers a way through the complex considerations that can influence heritage and tourism to achieve positive results for all interests. It encourages:

- better communication between stakeholders
- a heightened understanding of the issues
- higher quality tourism products
- increased support from local communities
- minimal and managed impacts
- increased awareness and understanding of natural and cultural heritage for staff, communities, operators and guests.

STEPS TO SUSTAINABLE TOURISM

Before you start…

Sustainable tourism is a long-term goal. At its heart is what makes a region, place or tourism product special. Throughout this document environment and heritage are key terms used frequently. *Environment* refers to all ecosystems and their parts, including people and the cultural qualities and characteristics of places. *Heritage* is our natural, Indigenous and historic inheritance. Environment and heritage significance is an important part of the picture. It is these special qualities or values of places that underpin marketing, interpretation and creating a satisfying experience for the visitor.

By taking a thorough approach to planning, such as this 10-step process, you can help to build a productive and lasting partnership between heritage and tourism. Don't be surprised if you find that you need to revisit some of the steps or if you take more time on some than on others. The process is a guide only and is flexible enough to be used in the way that best suits your circumstances.

Be prepared to devote time and possibly some resources to working through this process. If you're able to do this, you will find that it is a very powerful tool to thoroughly explore issues at the most complex of heritage places and regions and to determine the best way forward.

Guiding principles

Several guiding principles or philosophies have influenced the development of the 10 steps. They are:

- inclusive decision-making
- sustainable development
- tourism and heritage principles
- appropriate tourism development.

Inclusive decision-making

Four key perspectives are involved in tourism and heritage — those of tourism operators, heritage managers, visitors and the community. They all have particular ideas, issues and interests. If all groups are to benefit, the perspectives of these groups need to be considered in making decisions for the future. The 10-step process is designed to include and integrate the views of these different groups to achieve positive outcomes for all.
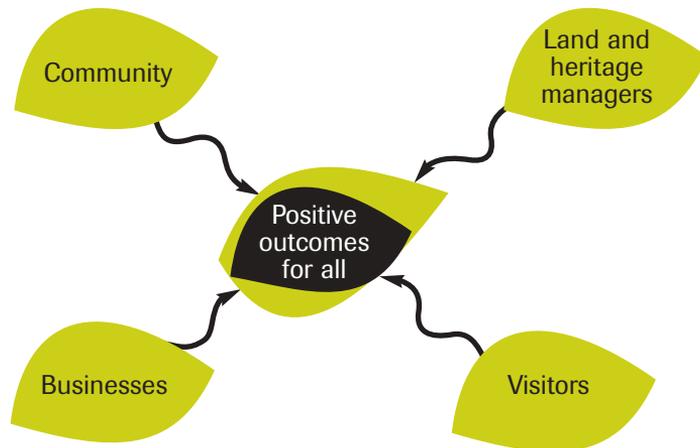
Sustainable development

Sustainable development needs to address economic, social and environmental issues. Many businesses now include social and environmental factors as part of their performance measurement. Sometimes referred to as 'triple bottom line' measurement and reporting, this approach focuses on accountability, transparency, commitment to stakeholder and community engagement and systematic measurement and reporting.

Tourism and heritage principles

An important complementary publication to this framework is *Successful Tourism at Heritage Places*. It sets out principles, guidelines and case studies that illustrate success factors in tourism at natural and cultural heritage places.

The principles from *Successful Tourism at Heritage Places* underpin this framework and should be a starting point for discussions and collaboration. They are:

1. recognise the importance of heritage places
2. look after heritage places
3. develop mutually beneficial partnerships
4. incorporate heritage issues into business planning
5. invest in people and place
6. market and promote products responsibly
7. provide high-quality visitor experiences
8. respect Indigenous rights and obligations.

Appropriate tourism development

Steps to Sustainable Tourism sets out an approach to help develop appropriate long-term solutions for tourism at places with natural and cultural heritage values. It also seeks ways to support growth in the tourism industry while ensuring that conservation needs are met.

Tourism will not be an option for some environments or heritage places where it is incompatible with the special values or management objectives of a place. Using the process in this guide will enable you to assess whether this is the case.

The 10 steps to sustainable tourism…

Step 1
What do we
want to do?

Step 2
Who is, could
be or needs to
be involved?

Step 3
What is
known?

Step 4
What makes this
region, place or
product special?

Step 5
What are
the issues?

Step 6
Analysing
issues

Step 7
Principles or
objectives to
guide action

Step 8
What are your
ideas and
options?

Step 9
How to do it?

Step 10
Statement
of directions
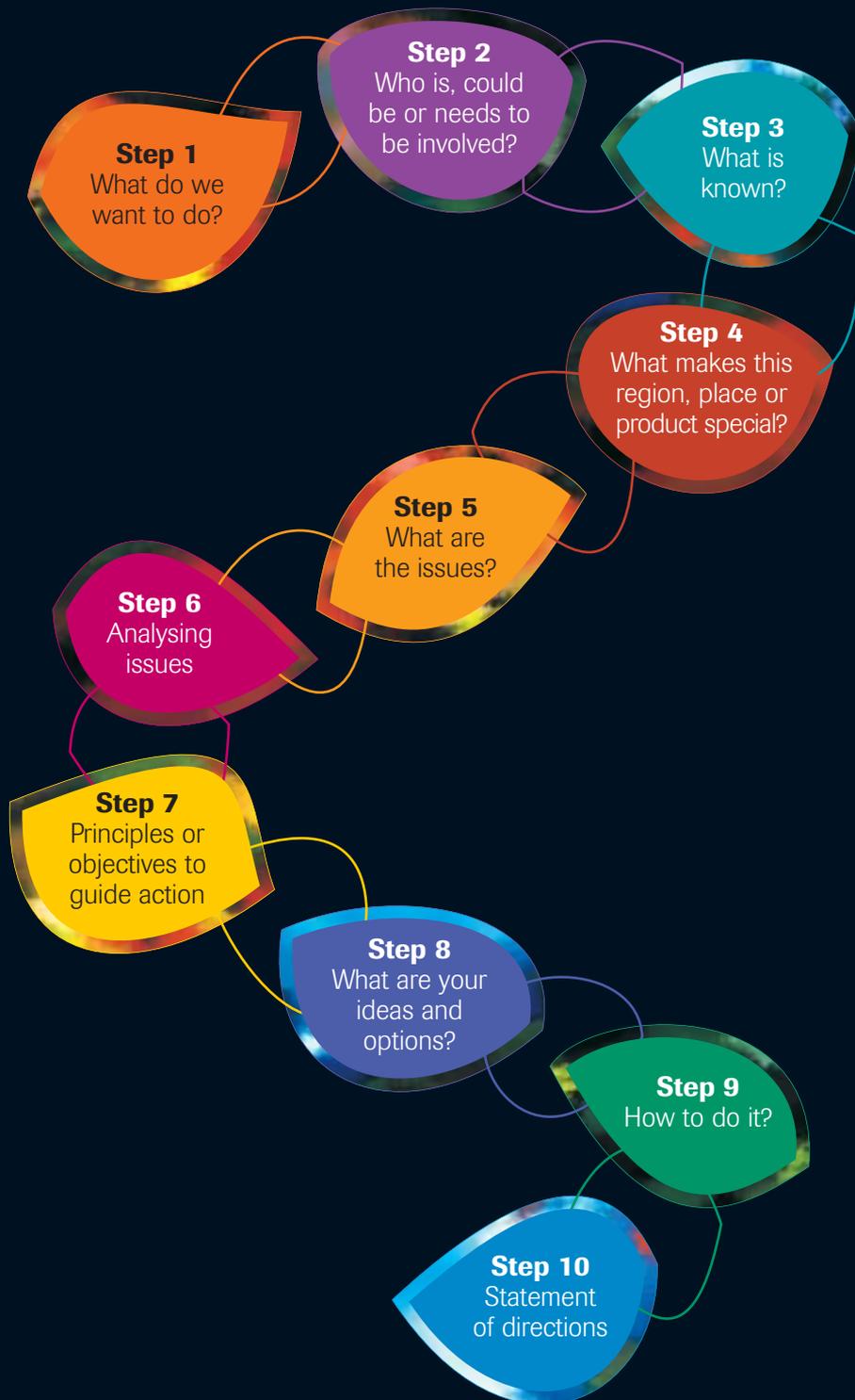
Elder Range, South Australia. Photo: John Baker.
Copyright: Department of the Environment and Heritage.

STEP 1
What do we want to do?

This step will help you to:
- define your aims
- understand the context

Whether you're using this process in relation to a region, a particular place or a tourism product, your first step is to determine what you would like to achieve and to understand the context of your project.

The statement of aim that you produce will become an important reference for briefings, consultation, media communications and proposals, as it will help others to clearly understand what you're trying to achieve. If a number of people are involved, you must all agree on your aims before going any further.

What are your aims?

A clearly defined aim will guide the work ahead. It can be as simple as you like and can be worded many different ways such as in a vision statement, mission statement or statement of purpose. Invest a little time in making sure this statement is tight, clear and achievable.

In developing your aim, consider:
- what are we aiming to achieve
    - in the short term?
    - in the long term?
- why do we need to do this?
- what time frames are we working to?

Examples of aims	
Region	*We want to identify and understand the potential for tourism development in the region, while enhancing community development and maintaining our natural and cultural heritage.*
National Heritage List Place	*To consider the tourism issues in developing a management plan for a place on Australia's national list of heritage places.*
Ecolodge	*To draft a plan for developing an ecolodge that contributes to the protection of the site's natural and cultural heritage values.*

STEP

1

Example of a vision statement

The vision of the project team is to provide a framework for sustainable tourism initiatives that help manage and protect key natural and cultural heritage assets. This will be used to develop new and existing tourism opportunities in an environmentally, economically and socially sustainable manner.

What is the context for your region, place or project?

To help you and others better understand the context of the region, place or project, you will need to set the scene in a brief overview statement. This statement should cover:

- social setting
- economic conditions
- current political climate
- natural environment setting *and*
- cultural considerations.

Some of the key questions you may need to answer succinctly are:

- what are the key natural and cultural assets for tourism?
- what are the current visitor numbers?
- what is the potential for future growth in visitor numbers?
- how well is the current situation working?
- is the place or region appropriate for tourism use and development?

If at all possible clearly identify common ground or potential areas/points of conflict between those interested in the place/project. Defining common ground early in the process can be important in assisting progress. How to manage issues and conflicts will be explored in later steps.

Example of a context statement

Lake Eyre Basin Heritage Tourism Study

The Lake Eyre Basin is the heart of Australia. It covers almost one-sixth of the continent, across four states. It stretches from the Macdonnell Ranges to the Great Divide, from the Barkly Tableland to the Flinders Ranges. It includes Lake Eyre, the Simpson Desert, the Oodnadatta, Birdsville and Strzelecki Tracks and one of the world's great, unspoiled desert river ecosystems, covering the Cooper, Georgina and Diamantina catchments.

The basin is home to only 57 000 people. A Lake Eyre Basin Coordinating Group (LEBCG) was formed in the mid 1990s with pastoralists, Aboriginal groups, tourist operators, mining and petroleum interests, conservationists and others to manage sustainably the area's natural resources.

Tourism is seen as an economic opportunity, but also has the potential to create adverse impacts on the natural and social environment. In response to this, the LEBCG in partnership with the Australian Government initiated the Lake Eyre Basin Heritage Tourism Project (2001–03). This project evaluated heritage assets, engaged with stakeholders, raised awareness, identified issues and locations for specific management and future development, and established guidelines for informed decision-making. The outcomes from this project are presented in *Lake Eyre Basin Heritage Tourism Future Directions*.

Although there is no clear count on tourism growth throughout the Lake Eyre Basin, all the indicators are for constant growth, with some of the icon areas showing considerable increase. The Simpson Desert, as an example, in just over 10 years has grown from around 300 recorded crossings to now more than 4000 vehicles crossing in a season. Equally, the icon towns like Innamincka and Birdsville are now seeing visitor numbers of approximately 50 000, which is a threefold increase over the past 10 years.

Tourism presents a major challenge and opportunity and needs to be seen as an integral part of the natural resource management initiatives in process throughout the Lake Eyre Basin.

[Schmiechen, J. 2003 *Lake Eyre Basin Heritage Tourism Future Directions*, Lake Eyre Basin Coordinating Group.]

Australian Alps. Photo: Dr J Flood.
Copyright: Australian Heritage Photo Library.

STEP 2
Who is, could be or needs to be involved?

This step will help you to:
- identify stakeholders
- consider when and how people should be consulted and involved
- work out how to develop effective working relationships

It is important to find out who is concerned about and responsible for tourism, environment and heritage issues relating to your place or region.

If you systematically and strategically identify and involve those with a stake in your place, region or tourism product, you will:
- ensure the right people are involved in planning and future activities
- help determine heritage significance of places involved
- help make sure all the important issues are considered
- help to decide what future actions are realistic and will best meet everyone's needs *and*
- help build support for regional plans, management plans and development proposals.

This step is important as it will underpin all future steps and will need to be revisited and updated continually.

Initially, everyone who is, could be or needs to be involved or considered in future decisions should be identified and the nature of their interest noted. From here, various forms of consultation, as appropriate, can be considered and this can then lead some form of involvement in the process, project or business.

Identify stakeholders and the nature of their interest

Consult
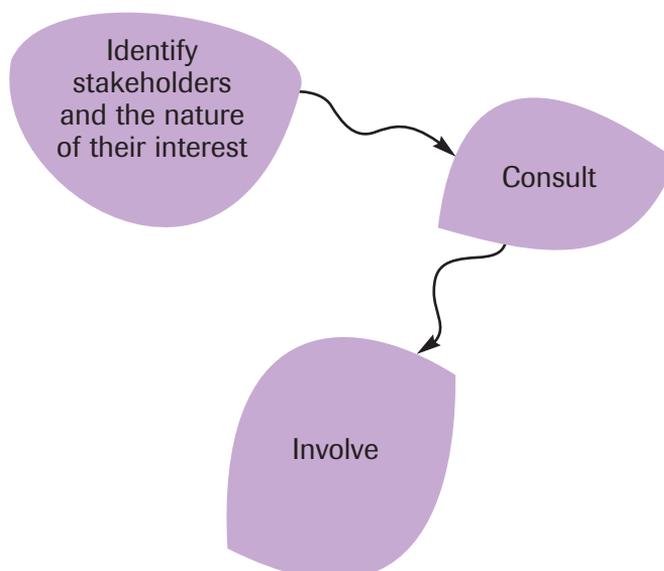
Involve

Who are the stakeholders?

Determine who is, should or could be involved by listing all potential stakeholders. Consider the following categories:

You can identify stakeholders by:

- talking to people
- reading existing reports *and*
- if necessary, publicly or formally seeking interested persons or organisations.

Start using existing networks and communication forums to identify the people who might be involved. Ask your colleagues:

- who else should I talk to?
- who is not involved who should be?

Some or all of the following questions may help you to identify the people, groups and organisations who may need to be informed, consulted or involved in some way.

General

Who owns the land or lands associated with your product, place or region?

Who uses your product place or region?

Who is involved in managing the land or waters involved?

What is the relevant local government/s?

Environment and heritage	Tourism
Who knows about natural and cultural heritage places in the area?	Who are the investors?
Who owns land where these heritage places are located?	Who provides food and accommodation services?
Who manages the land?	Who provides transport services?
Who has custodial or caretaker roles for these heritage places?	Who runs tours?
Who are the Indigenous Traditional Owners and/or custodians?	Who provides other services that rely heavily on tourism?
Who lives or has lived at these heritage places?	What is the regional tourism marketing or planning organisation?
Who works or has worked at heritage places?	What economic development associations or organisations are there?
Who has legal responsibility for these heritage places?	Who provides permits and approvals for commercial operations?
Who makes decisions that affect these heritage places?	Who provides or could provide funding for tourism development at heritage places in the region?
What groups take, or might take a particular interest in these heritage places?	Who publishes tourist guides?
Which specialists are particularly interested in these heritage places?	What do guides say about who is involved?
What non-government organisations are active in the area or might take an interest?	Who is using tourism products, facilities and services?
Is there anyone else who might be interested in what happens or who might be able to help?	
Who else uses the land?	
Are there educators who should be involved?	
Who owns tourism businesses?	

Understanding the nature of the interest of each stakeholder helps, whether it is statutory, professional, economic, cultural or personal. Depending on their interest, stakeholders may just need to be kept in mind in future steps, others will need to be included in some form of consultation and a smaller set will need to be involved. The essential or key stakeholders should be identified as early as possible.

How to consult and involve people

Informing and involving people can be challenging and time consuming but can make a huge difference to successful projects, plans and tourism products. Consultation processes can be targeted at your key stakeholders for specific purposes, or might be designed to generally inform the community, build support and seek willing involvement.

There are many different consultation techniques. Choosing the best one for you will depend on the context, type of people involved and the available human and financial resources. Some techniques are formal, others are targeted and specific. The range of techniques includes, but is not limited to:

- community meetings
- interviews
- public exhibitions, displays and information sheets
- advisory committees
- media placements seeking input
- written submissions
- telephone polls and surveys
- focus groups
- open days
- guided information tours
- conferences or workshops
- residents' feedback sessions
- visual mapping
- pictorial and photographic illustration.

If you would like help in developing your consultation approaches, you may like to engage someone who is trained or experienced in consultation techniques. Additional resources detailing consultation methods are listed in the references section.

Working out the appropriate people to involve is often a matter of common sense, but it can be important to involve people other than the usual suspects. Sometimes these people can be a breath of fresh air, and bring with them new and interesting perspectives.

How to develop effective working relationships

Several other factors may make a big difference in establishing or developing effective working relationships, such as:

- identifying the 'drivers' or champions
- identifying the key people to be involved in regular communication *and*
- identifying important partnerships.

Drivers and champions

Every project or process needs someone to coordinate activities, bring people together and be the central contact point. This individual may be the initial person to get the process rolling before handing it on to others, or they could be nominated as the coordinator by superiors or a project team. This person, along with other contact people, should be clearly identified, and all key stakeholders notified of their role, and provided with their contact details.

Project teams, working groups or steering committees

Where possible, use and build on existing communication mechanisms to coordinate work. If a suitable consultative group does not already exist, it may be useful to set up a working group to address issues relevant to your region, place or tourism product. The aim of the working group should be to communicate across organisations, integrate the needs of tourism, heritage and the environment and foster support for the process.

Possible participants for a working group

Appoint members and use them as conduits for information into the group and out to the broader community. Your group can be as formal or informal as you like. It can provide a focal point for reporting and communication between people, accessing information, exploring options, making decisions and communicating to the broader community. It should reflect all key interests, and should involve key people or organisations at the core of decision-making.

The following pointers may help you to establish your group:

- decide on the role of the working group, how often will it meet and what is expected of its members
- try to keep your group small rather than large as it is likely to be more effective, but remember also to let others know what you are doing encourage working group members to promote the process by spreading news about progress and key issues
- nominate a contact person and/or coordinator, or a system to rotate the role *and*
- make sure everyone has their say, set meetings with a clear agenda, time limits and defined outcomes.

Developing partnerships

Successful tourism often requires resources that no one organisation can offer so partnerships can be an effective tool when dealing across tourism and heritage issues. They can help to build support, and to coordinate rather than duplicate efforts. Taking a partnership approach early on, may help you when seeking approvals and may ensure that you have all the right information as a project progresses.

The key steps to developing partnerships are:

1. identifying what key partnerships will help you to achieve your goals
2. identifying the people who are or should be involved
3. building the relationships (using this document is a good start)
4. developing mutual understandings of issues and the natural and cultural heritage involved
5. jointly developing goals and objectives
6. expressing commitment to the partnership, and to implementing agreed future actions.

STEP 3
What is known?

This step will help you to:
- identify existing studies or sources of information relevant to your process or project
- locate and summarise available information on the current and potential market for tourism
- determine the heritage assets, their heritage values and themes

STEP
3

Information is a powerful tool so drawing together relevant facts and figures will provide a solid grounding for future decisions. As you look for material on planning and managing tourism at heritage places, and the current and potential tourism market, you may find that much useful information already exists.

Where to look

You might have a look at books, newspaper articles, sound recordings, council records, tourism brochures, annual reports, tour operator records, park management plans and research reports. Information can also be found:

- by talking to knowledgeable individuals and through observations, interviews, questionnaires and focus groups
- in local and state libraries
- in private collections
- on websites
- through various local or regional organisations
- in universities
- at heritage site management authorities
- at state and Australian Government departments
- with tour operators.

The following questions may help you to find relevant information.

Questions to ask
Are there any: • regional plans for economic development? • relevant local government plans? • expressions of community aims/aspirations?

Environment and heritage	Tourism
What places are formally recognised on heritage registers?	What tourism projects and studies have been, or are being undertaken?
What key heritage projects and studies have been, or are being undertaken?	Have visitor statistics or other formal data been collected (surveys, entry records, road counts etc)?
What stories of place or oral histories have been recorded?	Who are the visitors (age, gender, place of residence, etc)?
Have there been any studies of the condition of places?	What do visitors do when they are there?
Is there any baseline data already available?	When do people visit?
Has there been any monitoring of places?	How do people get there?
What are the key heritage assets of the area or product, including places and other assets not on heritage registers? (these could be included as a list in an appendix)	Why do people visit?
	Is there a particular focus or priority for tourism at a regional, state or national level?
What are the legislative requirements affecting administration of the area?	

STEP **3**

If you can, also try to identify what areas of information seem to be missing as these might be important parts of the overall picture and may need to be obtained some other way if they are important for making future decisions.

Other sources

Environment and heritage information

A useful starting place for environment and heritage information is through the internet at sites such as the Australian Heritage Directory (www.heritage.gov.au). The websites of the Australian Government Department of the Environment and Heritage, and state environment, park and heritage agencies are also useful.

Tourism data

The websites of the Australian Tourist Commission and state tourism organisations may be helpful. If you prefer, you can contact these organisations directly and other bodies such as regional tourism organisations, local tourist information centres and research authorities such as the Cooperative Research Centre (CRC) for Sustainable Tourism.

STEP
3

See the Contacts for further information section at the end of this document.

In finalising this step, consider the information you have collected and reviewed. You should now be able to draft a:

- summary of the key sources of information
- summary of the natural and cultural heritage assets of the region *and*
- summary of the current and potential market for tourism.

These summaries can be used:

- to inform both yourself and stakeholders of what information is available and what it indicates
- in a report to show what underpins your process *and*
- to outline what information exists and what needs to be obtained.

Yerong Hotel, Adelong, NSW. Photo: Jeff Drewitz.
Copyright: Australian Tourist Commission.

STEP 4
What makes this region, place or product special?

This step will help you to:
- identify what is special about your region, place or product
- establish how well its special values are recognised and currently communicated
- establish whether further potential exists to use these special values in tourism and interpretation

In this step you need to identify the important values of your place, region or product, and the ways in which they are understood and communicated. Places can be special for all kinds of reasons — they may be important to the local community or to the world as a whole.

Tourism, heritage and local community interests will benefit from developing a common understanding of what is significant so that they have a unified approach to presenting local and regional heritage to visitors.

Identifying natural and cultural heritage values

Natural and cultural heritage places are often the key assets for tourism. The unique qualities of a place, or its values, can be a large part of a tourism business and its key selling points.

Understanding the values of your heritage places is essential for effective product development, planning, marketing, management and interpretation. It is also important when considering the appropriateness of introducing or expanding tourism activities at your heritage place. This understanding helps to ensure that future development is as compatible as possible with the ongoing care of the values.

You may find that the values have already have been documented by natural and cultural heritage specialists or are known to locals. Heritage professionals have developed considerable expertise and have structured methods (including criteria) for assessing the significance of a place. Information they can offer on aesthetic, historical, scientific, social and spiritual significance will be valuable. Hunt out this information. A good place to start is to check local, state or national heritage registers.

Identifying other values

Other values, aside from those formally recognised by heritage specialists, are also important. These may be the less tangible aspects that make a place, region or experience special to the local community or to visitors. They may relate to its cultural, community, recreational and economic uses.

Additional information on identifying values can be found in the companion volume to this framework, the *Protecting Heritage Places Kit*, listed at the end of this booklet.

The tourism perspective

Stories based on heritage values, particularly those provided by local people, are often what make a place attractive to visitors. These stories are also what visitors take away with them and share with others when they return home. The combination of values, stories and landscapes, can create a total 'experience' for the visitor.

Determining what makes the region, place or product special should take into account all the values that are known. The following questions may help you to identify the special attributes of your region, place or product.

What is special about your region, place or product?	
Environment and heritage	Tourism
What are the known natural and cultural values of the region or places? What heritage values have been formally recognised in heritage registers? What are other heritage values that are likely to exist (which are not formally included in heritage registers)? What themes are recognised? What values are held in the community (whether formally recognised or not)?	What special values of the region, place or product are already used in tourism? What special values of the region, place or product are of particular interest to current visitors? Is there an icon element to attract visitors to the region, place or product? What themes are used in promotion and marketing?

STEP
4

The following questions will help you identify potential areas for improving current approaches and developing new programs, products, activities, services or infrastructure.

Understanding and communicating environment and heritage values	
Question	Detailed questions
How well is the natural and cultural heritage of the region, place or product understood and communicated?	How well are the significant values recognised by key stakeholders?
	Is there a shared understanding of what makes a place, region or product special?
	Is this reflected in existing plans, strategies and other written materials?
	Where and how can changes be made?
	How well are the special values used in existing products and in marketing? What values are emphasised?
	What aspects of special values are not used in tourism?
	What aspects of special values are poorly represented or misrepresented in tourism?
	Are special values being conveyed fully and/or appropriately?
	How could special values be communicated more effectively?

STEP
4

The results of this step can be presented in a statement of why this region, place or product is special. This statement is a blend of identified heritage values and other values which potentially make the region, place or product engaging for visitors. It is called a 'Heritage and Tourism Value Statement'.

This statement can be used to develop a common understanding of what is special about a place and the best way to present these values to visitors (protecting the resource while improving the product). Once agreed, it can form the basis for stakeholders to move forward to the next step.

This statement should be followed by a short outline describing:

1. how well the special values are currently being recognised and communicated to visitors *and*
2. what added potential exists to use the special values in tourism and interpretation programs.

Gumbalyana at Injalak Hill, Northern Territory.
Photo and copyright: Injalak Arts and Crafts Association Inc.

STEP 5
What are the issues?

This step will help you to:
- identify and understand the key issues affecting your region, place or product

STEP
5

This step is about identifying all the important issues or factors that might affect what happens in the future. This means talking to people and looking at the information you have collected to date. Tease out the important matters that are unresolved or that will impact on your place, region or tourism product. Before you start, remember:

- issues are not always problems — they can be worked on and with
- identify conflicts in perspectives or issues — flag these for further clarification and analysis so that you can find ways to address them later
- focus on the issues and not the people raising them
- if people have identified issues, make sure these are considered through the next steps. People's views need to be reflected in the process and individuals should also be able to see their input
- in identifying issues, you may come across some which require expert advice or further investigation. This could include professional assessments of the condition of places, market potential, and visitor management and interpretation. Obtaining professional advice or digging out extra information may help to build a sturdier foundation for planning future work, forecasting budgets and preparing for any necessary approvals
- a thorough knowledge of issues will also help you to develop performance measures and monitoring indicators as you address the issues over time.

Ways to identify issues

Identify issues clearly and thoroughly. Where necessary, consider using professional skills and approaches, such as those offered by facilitators experienced or trained in techniques for working with stakeholders and identifying issues.

If you are undertaking this step yourself, think of running separate meetings or separate parts of meetings, so that people have a chance to think and talk about issues concerning them. Record what people say. Ensure everyone has an opportunity to express their view.

Further checks that can help you to identify important issues are:

- *Revisit step 2* (who is involved?) and consider the issues that might come from different perspectives and stakeholders. If you don't have an understanding of issues from their point of view, how might you find this out?
- *Revisit step 3* (what do we know?) to consider issues raised previously. Are there any recommendations that have been made before?
- *Revisit step 4* (what is special?) and consider issues that arise when we understand what makes a place, region or tourism product special.

Identifying issues

To help consider and cover the range of issues relevant to both tourism and heritage, it may be useful to consider:

- consumer/visitor experience
- community experience
- environment/heritage management and impacts
- infrastructure issues
- market/marketing issues
- tourism product availability
- economic cost/benefit issues
- training/capacity building
- strategic and resource context
- approvals and regulation.

In considering each of these, it may be useful to look at the following questions to help you consider possible issues. Not all will be relevant to your situation.

Consumer / visitor experience	
Questions	Detailed questions
What issues are apparent from any market research?	Has there been any market research into visitor expectations and satisfaction in the region? What does this tell us?
What are the patterns in flow of visitors?	Where do visitors enter and leave the region or attraction? What do visitors do? Do visitors gather at certain places? Where do they spend most of their time? Is there congestion? Are particular seasons more popular? Is visitation unsuitable during some seasons? What is the average length of stay? What other factors affect flow patterns?
What interpretation issues are there?	How well are heritage values interpreted and communicated to visitors? Are some heritage values presented more strongly or clearly than others? Whose perspective is presented in interpretation? Are different perspectives acknowledged? Does interpretation cater adequately for the range of users? How well are educational components included within interpretation products and programs?

Community experience

Questions	Detailed questions
What key local community issues are there? How can the community be involved in tourism product development and ongoing management of tourism?	How is community ownership and support going to be developed/fostered and maintained? What are the barriers to tourism development that might confront Indigenous individuals, groups or communities in the place/region such as education, community health, culture, finance, tourism industry knowledge and marketing expertise? How is the wellbeing of the local community being affected, or how might it be affected in the future? How can tourism contribute to the community?
What are key issues relating to intellectual property?	Are there intellectual property issues relating to Indigenous knowledge? Are there intellectual property issues relating to other individuals or groups?

Environment and heritage management and impacts

Questions	Detailed questions
What issues does an understanding of what makes a heritage place special raise?	What obligations or issues arise from the identified special values of a place? Are there other natural and cultural heritage values that could be incorporated into products, interpretation and business management?
What threats are there?	Are there threats to the special values or physical fabric of a place? What places or areas are considered particularly vulnerable? Will tourism be conducted in or near protected areas? Will this affect the management of the areas' values? Can threats be prioritised?
What visitor management issues are there?	Are some places overused? Is crowding or group size an issue? Is there any guide on what might be suitable carrying capacity or other limits on the use of places? Is there minimal impact material information available that is relevant to the activity/place/culture/region? Is current visitor behaviour appropriate? Are there particular place management issues for different seasonal visitation? What visitor activities are being, or will be undertaken? What are the impacts associated with these?

STEP
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Environment and heritage management and impacts (continued)	
Questions	Detailed questions
What can be said about the impacts occurring at the site and whether there is adequate monitoring?	What impacts (social/cultural, economic and environmental both positive and negative) are occurring in the place or region? This could include impacts on vegetation, soil, water, wildlife, visitor experience, community wellbeing etc. What is causing the impacts? What is the quality of any existing baseline data which could be used in monitoring? Is there guidance available to assist in monitoring activities? Has there been souveniring or vandalism at places in the region that are part of the tourism product?
What is the level of industry involvement?	How could or how does the tourism industry contribute to conservation and/or maintenance of the environment and heritage assets?
What are the hot spots?	What locations or attractions are a particular focus for visitors? Why are they popular? How are favoured locations coping with the level of use?
What is known about specific environment or heritage issues?	What issues are apparent from specific environmental or heritage studies that have been undertaken such as archaeological studies, flora/fauna surveys, visual impact assessments and physical conservation assessment? Are there issues about whether specific technical studies might need to be undertaken for approvals or other reasons?

STEP
5

Infrastructure issues	
Questions	Detailed questions
What road and transport issues affect tourism to the region or place?	What is the proximity to major international and domestic gateways? Can existing infrastructure cope with the desired amount of tourism (air transport, quality of roads, accommodation, services and facilities, diversity of experience)? How adequate are current roads, signage and transport in terms of access and visitor experience? What is the condition of existing roads, routes and tracks? Are new ones needed? Is upgrading or rationalising needed? Could signage be improved to provide better information and directions? What main regulations apply to tourism and infrastructure development? Do current road and transport plans accommodate tourism growth?

Infrastructure issues (continued)	
Questions	**Detailed questions**
What key visitor facilities are there and are they suitable or adequate?	Is there a visitor centre in the region, how much information does it disseminate, is this information used by visitors? Is crowding at visitor centres or key attractions a problem or likely to become a problem? Are walking tracks and visitor facilities designed for disabled visitors? Is current hard and soft traveller information adequate? 'Hard' information relates to things you can see or measure such as signs, guidebooks and leaflets while 'soft' information usually reflects people's perceptions such as ranger advice and guide talks.
What water issues are there?	What are estimates of use for potable and non-potable water? How will demand for water grow with the projected increase in tourism? Are local residents reliant on the same water source? Will the projected growth in tourism impede the adequate supply of water to local residents? What can be done to conserve/recycle water?
What energy issues are there?	What are the current energy practices and technologies utilised? How could these be improved? Is there access to mains power? What is the potential for alternative power sources? Are local residents reliant on the same power source used by tourism? How will demand for energy grow with increases in visitation?
What waste issues are there?	What can be done to reduce consumption and generation of waste? Are services and infrastructure for treating human wastes adequate? What issues does projected growth in tourism raise for waste management? What programs/services are in place for recycling? What programs/services need to be introduced? What waste removal processes/services are in place? For what capacity are the current services designed? How will they cope with projected growth in tourism?
What other infrastructure issues are there?	How are telecommunications facilities meeting current demands? What are the projected needs for telecommunications in the future to support tourism? What can be done to educate staff, guests and the community about minimising water and energy use and waste generation?

STEP
5

Market / marketing issues	
Questions	Detailed questions
What is the big picture?	What are regional and state strategic directions for marketing tourism that might affect the region? Are these outlined in a plan?
What is known about the current market?	What is the current profile of visitors to the region, place, attraction or product? What is the seasonality of visitation? What seasonal factors affect visitation? What is the demand in the region for tourism products focused strongly on natural and/or cultural heritage places or themes?
What affects access of the region, place or product to markets?	What is the proximity to major population centres? What sort of diversion is required from major travel or tourist routes? Is there, or is there likely to be, passing trade? Is there an icon element to attract visitors to the region, place or product?
How is the region, place or product currently being or proposed to be marketed?	Is the place or region marketed cooperatively, on a regional basis — what marketing is currently being done? Is marketing informed by an understanding of visitor demand? Is the marketing of the place, attraction, product or idea complementary to the region's primary image/market? How is the marketing of the region related to the marketing of adjoining regions? How does the place relate to other regional attractions?

Availability of tourism product	
Questions	Detailed questions
What market issues need to be considered in the future?	What trends might be anticipated in the market demand for the experiences on offer? What is the realistic potential for new drawcard attractions? How can provision of more diverse experience better meet the demands of different styles of visitation and different user profiles? Can existing products be improved through appropriate interpretation? Can a themed approach be used to improve current tourism products or better linked for a regional product?

Economic cost / benefit issues

Questions	Detailed questions
What are the economic pros and cons?	What are the potential gains and losses for the community or organisation? Are these clearly and realistically articulated and understood?
Are there other resource issues?	What issues are there in relation to time, money, etc?

Training / building capacity

Questions	Detailed questions
What issues relate to the development of skills and expertise?	What specific skills and expertise are needed to develop and maintain a high quality product? What financial and business support is needed? Is access to education adequate? Is a needs analysis required? What capacity do people have to participate in management and tourism development processes? What support might be needed to enable people to participate more effectively?
Are there communication issues?	What existing mechanisms or forums are there for communication such as development committees, working groups, advisory groups, community forums etc? Is there scope for partnerships between managers, communities and the tourism industry? What communication mechanisms need to be set up to facilitate processes?

STEP
5

Strategic and resource context	
Questions	Detailed questions
What aspects of the political, strategic and policy-making environment will particularly affect what might be done in the future?	Who makes decisions? How are decisions made (what is the process)? What is the timing of planning cycles (when are new plans or strategies or corporate aims due to be revised)? What are the political pressures at play? What personality issues affect what might or can happen?
What are the strategic priorities or directions?	What are the key aims/objectives of relevant plans and strategies? What other planning processes might affect the management of the site/tourism potential of the site? How will tourism affect other plans? Who is active in implementing relevant plans and strategies? Are there particular projects being implemented?
What funding is available for this project or plan?	Are funds already allocated to this project? Could further funds be allocated? What other sources of funding could be available (for example, grants etc)? What other in-kind contributions could be used?

STEP
5

Approvals and regulation	
Questions	Detailed questions
What key factors will determine the types of approvals needed?	Who is proposing changes? Who needs to seek approvals? Who is likely to be affected by any changes or proposals? How does land ownership affect what approvals are required? Are cultural approvals required for example, from Traditional Owners? Is there a process by which community approval can be or needs to be obtained?
What local government requirements apply to this place, area or proposal?	What local statutory requirements apply? How do they affect what can be done? What local planning guidelines or procedures need to be followed? What costs and time factors are involved in approvals?
What state requirements apply to this place, area or proposal?	What state legislation is likely to apply? How does this affect what can be done? What state approvals processes need to be followed? What costs and time factors are involved in approvals?

STEPS TO SUSTAINABLE TOURISM

Approvals and regulation (continued)	
Questions	Detailed questions
What Australian Government requirements apply to this place, area or proposal?	Will any issues trigger the *Environment Protection and Biodiversity Conservation Act 1999*? How do they affect what can be done? What process will help to meet any approvals that might be required? How can information be prepared which suits both state and Australian Government approvals processes? What costs and time factors are involved in approvals? Are there any other requirements?
What international requirements apply to this place, area or proposal?	Is it a World Heritage Area, Ramsar wetland or other internationally significant place? Is a proposal likely to impact on the international values of a place?
What permits are required?	What permits are required to operate in a particular area, or to undertake particular commercial or other types of activities? How are permits obtained? What costs and time factors are involved in gaining permits?
What voluntary standards are relevant?	What voluntary standards can assist in achieving a high standard of work? What voluntary standards can assist in meeting the requirements of approval or other regulatory processes?
What industry accreditation issues are there?	Are there accreditation schemes appropriate to the region and type of tourism activity? What is involved in gaining accreditation? What are the costs and benefits of using accreditation schemes?

STEP
5

A thoughtful presentation and discussion of the issues raised by answering the above questions can be drafted under suitable headings such as those above, or whatever form is most appropriate to your region, place or tourism product. Where possible identify the highest priority issues as identified by knowledgeable people or by consensus. This will help you to target the analysis in the next step (Step 6).

Sometimes an issue is broadly identified, but not enough information exists on which to base a reasonable judgement. In this case, either you need to gather more information about the issue, or use some sort of analytical technique to develop a clearer picture.

Various types of analysis appropriate for tourism, heritage and business planning are detailed in the next step.

Handling conflicts

It is important to identify areas of conflict, as these can reappear later as barriers to progress or action. Looking beyond the conflict of different ideas and people and getting to the root cause can often help to resolve the issue. Conflict is often inevitable. It can make ideas or projects unworkable, but it may also present opportunities for innovative solutions.

Various methods of conflict resolution and mediation processes exist. Rather than focusing on the particular individuals and their views and creating an adversarial situation, there are ways of working with interests to acknowledge views, explore issues and develop solutions cooperatively.

In some cases informal cooperative and collaborative approaches will be successful, others may require more formal approaches such as negotiation, arbitration or mediation. Using the services of a professional and 'neutral' facilitator can produce a good result.

Keys to managing and resolving conflicts include:

- having an inclusive participatory process
- maintaining open and effective communication
- being responsive and adaptable *and*
- building consensus between a majority of stakeholders.

STEP

5

STEPS TO SUSTAINABLE TOURISM

STEP 6
Analysing issues

This step will help you to:
- further analyse, clarify and prioritise issues
- prepare a succinct summary of the outcomes of your analysis

Now that the issues have emerged from the last step, you may need to delve further to clarify what is going on. Important issues need to be fully understood if the right decision is to be made about a particular course of action.

Concentrate your efforts on analysing priority issues. If resources are limited you may need to make a judgement based on available information and analysis. Analysis may simply be a matter of presenting a reasoned judgement about an issue with justification of how you came to that position and citing what data or information supports this.

More sophisticated analysis may help you to make better business and management decisions, but this can also be time-consuming and costly, so compromises may have to be made. In any case you should clearly state how you have reached your current understanding of the situation.

Many of the methods of analysis described below are standard approaches used in strategic planning. Some of them, such as market analysis, are essential components for business plans. You will need to decide what types of analysis are relevant or appropriate to your situation. The aim of using any analytical technique is to better understand factors at play in what might be a very complex situation. Analysis will also help to further identify and prioritise fundamental issues.

STEP
6

Key analytical methods may include, but are not limited to the following:
- market analysis
- heritage conservation analysis
- SWOT analysis
- situational analysis
- cost–benefit analysis
- priority analysis.

Market analysis

A number of market-related issues would have emerged in the previous step. A market analysis is an analytical summary of how your region, place or product fits into the marketplace. It takes into account the saleability or profitability of a product or service, based on information about the product and the potential market.

Market analysis may include an assessment of how your region, place or tourism product compares with existing competition. Are there others around competing for a similar market? What are their strengths? What are yours? Is the market big enough for people to share? How can your region, place or product be presented in the marketplace to maximise the fit between what you can offer and what people want?

Basically a market analysis should assess the supply and demand for tourism product, accommodation, transport and associated services relating to your situation. This type of analysis helps in positioning your product intelligently in the marketplace.

You can estimate the market potential for a product using information on sales volumes for similar products or in similar regions. Industry statistics collected regularly across Australia may also be available from you state or territory tourism organisation (refer to contacts information).

Market analysis often includes a forecast of where the market is going. Trends over time may indicate how your product or service may fare in the future. In the summary of your market analysis you should explain the potential for future development opportunities based on market and trend information.

STEP
6

Heritage conservation analysis

In Step 4 you identified the factors that make your place special — its heritage values. In some cases, when the implications of tourism on a heritage place become clearer, you may need to revisit this question with further specific studies on the heritage values, or on particular technical issues that may affect how the site is used.

One important type of conservation analysis is a condition analysis. This method uses trained heritage conservation experts to look closely at buildings, Indigenous sites or natural features and assess their physical condition, and their capacity to withstand visitors or other possible indirect impacts.

Situational analysis

This is a description of the context in which tourism is currently occurring. It includes the main determining factors such as the seasonal or geographic flow patterns and the functional relationships at play. Understanding the situation is the first step in designing the response.

A situational analysis involves analysing needs and assets, understanding what works well and what doesn't and the capacity of those involved. Including others in situational analysis helps to build a better understanding of the context or situation.

SWOT analysis (Strengths, Weaknesses, Opportunities and Threats)

This is a very standard way to help identify and consider the issues identified in Step 5. A SWOT analysis is a simple and useful part of many types of strategic plans, including business plans.

In this process you will need to consider the *present* strengths and weaknesses of your situation and *future* possibilities for opportunities and threats. Remember, that the weaknesses and threats can become strengths and opportunities if addressed.

This analysis will help you to get an overview of key issues, and will help to articulate issues that may not have come out in other ways. It is useful to undertake SWOT analysis after you have collected and considered information from issues identified in the last step.

Possible SWOT analysis questions	
Strengths	**Opportunities**
Do you have a popular tourism destination?	Is there an opportunity to promote your natural and cultural assets to tourists?
What aspects of the environment or heritage is being well managed?	Are there people in the community interested in working in tourism and heritage management?
Do you have knowledgeable people working in tourism and heritage management?	Could tourism utilise underused infrastructure (eg historic buildings)?
What are the strengths of your staff or the people involved?	What opportunities are there for partnership and collaboration?
Weaknesses	**Threats**
Are current approaches to interpretation looking a little old, or in need of revision?	What threats are there to the heritage values of the place or region?
Are there physical factors of the place or region which make visitor management difficult?	What threats are there to the physical condition of heritage places?
Are there particular factors which present problems for marketing?	What threats are there to the livelihood or ongoing economic or social viability of the local community?
What does evaluation and feedback indicate could be done better?	What threats are there to the viability of the business?
Is there a lack of training or capacity?	What threats are apparent from an analysis of potential risks?

STEP
6

Cost–benefit analysis

This is a relatively simple and widely used technique. As its name suggests, simply add up the value of the benefits of a particular approach or idea and then subtract its associated costs. Costs are either one-off or ongoing. Benefits generally accumulate over time.

Costs and benefits can be financial, environmental and social. Putting a financial value on intangible costs and benefits can be more challenging and highly subjective. Cost–benefit analysis is linked to the concept of the 'triple bottom line' which is used as a framework for measuring and reporting performance against three key areas — economic, social and environmental.

Cost–benefit analysis can be done formally, using quantified financial measurement, or informally. A simple way to do this is to list in a table all of the expected costs and benefits.

Some cost–benefit analysis questions that could be asked in relation to a region, place or project:

Possible questions	
Costs	Benefits
Will increased exposure and interest in the site lead to greater risk of vandalism and damage to the place? Will there be increased road traffic and increased maintenance costs? Will establishing best practice environmental management approaches be an additional cost to developers?	Will development of managed accommodation replace ad hoc, poorly managed camping on adjacent pastoral areas? Will the special values of an area be more effectively presented through the establishment of a facility to host interpretative information and orient visitors? Will people stay longer in the region if a key new facility/destination is added? Can best practice environmental management be used as a marketing and promotion tool?

STEP
6

Priority analysis

You can determine priorities in many different ways, but one simple way is to look at the importance and urgency of the issues. Setting issues out on a chart, such as the one below, can assist:
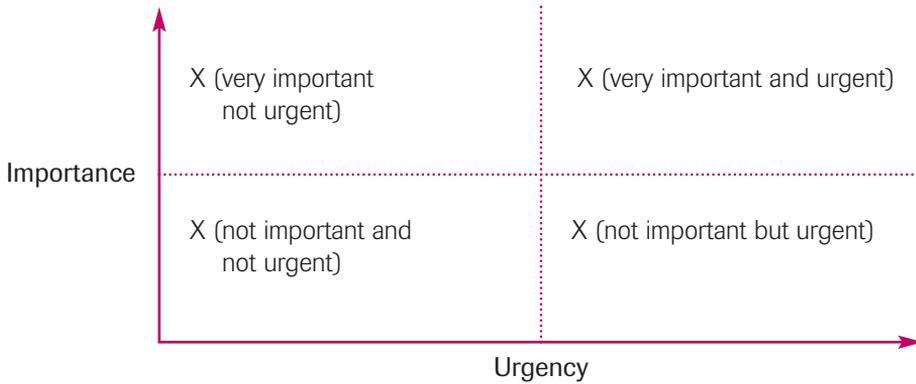
Consider each issue and its place on the chart. Issues that are judged to be both very important and urgent will obviously need to be addressed as a top priority. The priorities for issues which fall elsewhere on the chart will depend on the issue and context. The following questions may help you consider priorities, and place issues on the chart:

- are there options or actions that address important needs or gaps?
- which options or actions advance and support set priorities or responsibilities?
- is there a particular action that, if not taken, would result in negative consequences?
- what opportunities present themselves that should be pursued?

Ideally, you should do this analysis with a group of your stakeholders so that you develop a common understanding of your key issues. It will help point towards particular options and future courses of action, and will also help to build agreements between stakeholders on possible future directions.

STEP
6

Dillon Andrews, Mamabulunjin Tours, Kimberley, Western Australia.
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STEP 7
Principles or objectives to guide action

This step will help you to:
- develop a clear written statement to guide future actions, such as a set of principles, a set of objectives, or both
- seek agreement on these principles or objectives from key partners or stakeholders

Please note: In some circumstances you may need to further refine your ideas and options before starting this step. Doing Step 8 first may help.

Now that you have an understanding of tourism and heritage values and the key issues at play, you need to consider more specifically what you want to achieve. This should be a balance between looking after heritage and developing tourism if, and where, appropriate.

In Steps 2 to 6 you drew together all the relevant background material and knowledge. Using this as your foundation you now need to consider where you want to go in the future. In this step you will develop specific objectives, or if appropriate, a general set of principles, to guide future work.

These principles or objectives, need to deal with the realities of tourism while maintaining and protecting what is special about the area's natural and cultural heritage.

It is very important that principles or objectives are agreed by key stakeholders and that they have a high level of ownership. Implementation of the principles works best when people feel they have played an important part in their development.

Principles

In some cases a general set of principles is the most appropriate way to guide the direction and breadth of future work. Principles can be expressed in the form of guidelines, protocols or policy statements. For example, a tourism business might develop a set of responsible tourism principles, or a set of protocols might be developed with Indigenous communities covering issues relating to Indigenous heritage and tourism.

In historic heritage conservation plans, you can often find a statement of 'conservation policies'. Where these policies exist, they should be included in the principles as they are likely to guide the development of heritage tourism.

STEP
7

Objectives

Setting objectives is one of the most common ways of planning for the future. Objectives are sets of short statements that are like goal posts. They are something to aim towards, and can give a clearer focus to your plan and efforts.

Objectives should be written in clear language, be specific, measurable, realistic, and have a time frame. They are an important part of many planning documents, including business plans.

Objectives are created by thinking how you want the future to look. Build into your objectives words which reflect economic and community aspirations as well as the intention to take care of heritage. Objectives should be developed and owned collectively by stakeholders or business partners.

They can be written in several different ways. One approach is to state your intent, for example, *"to improve directional signage at…"*. The other way is to state the desired end result, for example *"signs installed at all…"*. The form you use will depend on personal preference and the context in which they are to be used.

You can measure whether or not you have met your objectives by developing indicators or tangible evidence of attaining your goals. You may also want to think about what milestones would help to break down your work into achievable stages.

As your work proceeds, any reporting should focus on your progress towards achieving your objectives. This is the means by which you and others can monitor performance.

Example of objectives

- To develop a regional tourism strategy focusing on key areas which are linked by a particular theme
- To build relationships and communication between tourism operators, attractions and regional managers of natural and cultural heritage places through regular reporting meetings
- To improve the regional directional and interpretive signage relating to tourist and heritage attractions
- To maintain and enhance the region's international profile as an ecotourism destination
- To ensure that educational materials are available relating to the values of particular places
- To secure increased financial resources to promote the distinctive natural and cultural heritage assets of the region
- To build the capacity in the local community to support and participate in tourism through awareness raising and training activities
- To increase market share from 2% to 5% within two years

STEP
7

STEP 8
What are your ideas and options?

This step will help you to:
- further refine your ideas and, if necessary, develop options
- work through your ideas and options with key stakeholders and decision makers
- seek agreement on preferred option/s with necessary partners or key stakeholders

You will have generated ideas and concepts as you have progressed through Step 3 (what information is there?), Step 4 (what makes this region, place or product special?), Step 5 (identifying issues) and Step 6 (analysing issues). The aims and objectives identified in Step 7 can help you to develop ideas and options in this step.

It's likely that you will have many different options and pathways to your final goal or goals. If you are working in a region or community, you may need to consider many possibilities before making a final decision. In planning for tourism the feasibility of one or more options may need to be tested and presented before funding or approvals are granted.

This step will help you to clarify your ideas and options, make decisions and prepare you for taking action.

Consider options by…
1. developing ideas
2. presenting ideas or options for testing
3. analysing issues further, if needed
4. developing recommended option/s
5. seeking agreement on preferred option/s.

STEP
8

Developing ideas

As you have worked through this process, many ideas will have emerged or will have been put forward by the people with whom you have been working. Now you can bring those ideas forward and show how they might work. You may need to bundle together specific ideas into packages or groups of actions. You will need to take into account key issues and to ensure that you maximise opportunities and manage any threats.

If clear ideas and options do not emerge at first, you may need to develop them through discussions, brainstorming sessions, focus groups or workshops.

In general, ideas and options should include:

- the visitor experience
- community engagement
- care of heritage assets
- infrastructure
- marketing
- product development
- stakeholder communication
- training and capacity building *and*
- necessary resources and support.

Revisit the issues and analysis (in Steps 5 and 6) to remind you of what aspects you need to consider. The table below is a checklist that may help you to generate ideas and ensure that different aspects are considered.

Consider	Questions
Visitor experience	What will help improve the visitor experience?
	What specific interpretation activities could be undertaken to improve visitor experience?
	How are we meeting demand for the particular natural and/or cultural heritage experience being offered?
	How will interpretation be delivered/improved? (*Successful Tourism at Heritage Places* provides guidance on this)
	What heritage themes will be used?
	What activities will visitors undertake?
Community engagement	How can community engagement be maximised?
	Can community representatives be included in key decision making processes?
	How can the community be involved in tourism at a heritage place?
	What sort of regional cooperation will be pursued?
	Who will be involved in developing tourism?
	What partnerships could be further explored?

STEP
8

Consider	Questions
Care of environment and heritage assets	How can heritage assets be best cared for?
	How will visitor impacts on values be managed?
	Will it be necessary to limit use of a place?
	What activities will directly contribute to maintaining a heritage place/asset?
	What steps will be taken to work cooperatively with park managers, site managers etc?
	What sort of actions will be taken to ensure the appropriate people are consulted in relation to Indigenous tourism, gender protocols, intellectual property etc?
	Are there significant plant or animal species requiring protection?
	Are there significant landscape values at the place — are they acknowledged or protected, how accessible are they and are they sensitive to visitor impacts?
Infrastructure	How can you best plan for infrastructure?
	How can tourism planning integrate with current local/regional planning?
	What will be pursued in terms of transport, waste, water and other services in order to meet visitor demand?
	What signage will be developed?
	Will the proposed infrastructure use sustainable energy sources, practices and technologies?
Marketing	How can marketing be more effective?
	How will visitors find out about the product/place?
	Can marketing be done cooperatively at a regional level?
	What key information, such as minimal impacts on heritage values, can be communicated?
	How will marketing of Indigenous tourism be strategic and coordinated?
	What is the marketing strategy?
	What are the place, regional and national themes?
	Will the product be promoted in visitor centres?
Product development	How can tourism products be developed?
	Is there good match between the product and the market?
	How will your product/experience complement regional tourism product/experiences?
	How can a better understanding of heritage values lead to new tourism products and marketing opportunities?

STEP
8

Consider	Questions
Communication	What is the best way to maintain, maximise and improve communication between interests?
	Are new communication forums needed?
	How will you report progress on achieving aims to people who need to know or who might be interested?
	What representation should be sought in government and industry forums?
Training and capacity building	What capacity building is needed in the community and in individuals?
	What skill levels will be needed for staff to perform at the standard required?
	What business skills need to be developed?
	Can formal training, industry development or accreditation programs assist?
Resources and support	What resources and support are needed?
	What advice may be needed at different times and where can this be found?
	What best practice environment and heritage management will be adopted?
	What research is desirable or useful?
Baseline data and monitoring	What data is needed about the physical condition of the environment or heritage places that will assist in monitoring potential positive and negative outcomes for conservation?
	What data is needed about and from visitors to ensure that in the future we can determine how effectively we are meeting customer demand and expectations?
	What data is needed about local community attitudes, issues, amenity and social conditions that will enable effective monitoring of the potential positive and negative effects of tourism?
	Who is responsible for collecting baseline data?
	What specific monitoring will be undertaken to ensure that significant impacts on environment and heritage assets, community health and business development are identified?
	What indicators might be necessary as a measure of performance for sustainable practice?

STEP
8

Presenting ideas or options for testing

Once you have put together your ideas into a package or proposal that you think will work you can then present this to a group of informed people, a business or project team or a stakeholder group. Use their knowledge and experience to test how your ideas might meet the needs of key interests while also addressing the issues and opportunities of the situation.

When presenting the options you should give a realistic assessment of their feasibility and include information on proposed timing and required resources.

Analysing issues further, if needed

When developing your ideas or options, you may discover that you don't have a clear picture of some important elements. If so, go back to Steps 5 and 6 to gather more information or further analyse your situation. If you have several possible scenarios, you can test how each scenario might fare in light of your market analysis. You might even want to conduct specific market testing of your ideas or product.

Developing recommended option/s

Once you have tested your ideas and gathered any extra information that you need, you can then develop your preferred options. These should be backed up by a clearly reasoned statement supported by the information you have collected in the steps so far. These options can then be presented in a proposal, feasibility study or strategic plan.

Good communication and people skills can make a big difference when it comes to convincing others of the benefits of your recommended option/s.

Seeking agreement on preferred option/s

Negotiating over the best course of action can be complicated by tensions between competing interests. Different stakeholders are likely to have different but equally legitimate priorities. At this point it is important to focus on the positive mutual interests that can link tourism, heritage conservation and communities and that can form the basis for cooperation.

Once a particular idea or option looks like meeting most people's needs, your next step will be to seek agreement through the necessary formal and informal processes. As you obtain agreements and support, make sure you document this for future reference.

STEP
8

Main Range National Park, Queensland.
Photo: Peter Lik. Copyright: Tourism Queensland.

STEP 9
How to do it?

This step will help you to:
- develop actions to implement your ideas, proposal or preferred option
- present them in a clear and logical form
- ensure they are included in other relevant plans and strategies
- develop monitoring and evaluation methods
- consider additional factors that will influence achieving your objectives

The preferred options or ideas from the previous step now need to be turned into actions that you can implement!

Making new projects or ideas happen may involve many stakeholders, organisations and groups. Even if implementation is the responsibility of one organisation or business, you will probably need to gain the support or approval of others. Whatever your situation, a clear implementation plan is essential. This not only makes sound business sense but is standard practice in project management. This plan can also be called an action plan or a work plan.

In addition to developing this plan, each participating organisation may need to look at its own planning documents to ensure that the implementation plan links to existing planning documents. It may be worth having an overall implementation/action plan for heritage tourism issues as a common agreed framework.

The following sample format covers the important implementation issues. For each objective, list the proposed actions needed to attain your goal as follows:

What needs to be done? (proposed action or strategy)	Who should be responsible and involved?	What is the sequence and timing?	What resources are needed?	How will this action or strategy be monitored and evaluated?

STEP
9

Additional factors

Additional factors that are crucial to address include:

- strategies for political support
- communication
- capacity building
- making links
- staging
- influence.

Strategies for political support – consider and include actions that help build political support for what you want to achieve. Lobbying can be a legitimate and necessary activity.

Communication – good mechanisms for communicating are vital in bringing together diverse interests and helping them to work together. Consider and include any actions or activities that will make this happen. Too often these communication activities are not given the resourcing or attention that they deserve.

Capacity building – while training and staff or community development may be included as an objective of the plan, you may also want to think carefully about whether implementing the plan will need specific training or capacity building. What support or additional capacity do individuals or groups need to participate and play an effective role in implementation?

Making links – consider how different activities can link together to create a whole which is greater than the sum of its parts. Often the most efficient use of resources comes from piggy-backing on other initiatives and pursuing activities with multiple outcomes.

Staging – consider how actions can build up in stages over time to reach the desired result. At times you may need to reach one stepping stone before reassessing where to go next.

Influence – gain the support of other key players and influence other plans or activities to increase your ability to make a difference. Ways of gaining support need to be considered and included in your planning and activities.

Keeping on track

STEP **9**

Any strategic plan, development plan or action plan needs to be followed and referred to regularly to be kept relevant. The best way to use a plan is to constantly check and report on progress. You can do this through:

- performance measures or indicators
- monitoring and reporting *and*
- evaluating and reviewing.

Performance measures or indicators – these can be used to monitor progress and identify what is being achieved They help to demonstrate how well an organisation, program or strategy is meeting its objectives or when actions are not proceeding as planned. They can also show where performance can be improved.

STEPS TO SUSTAINABLE TOURISM

Performance indicators can use qualitative and quantitative information. They should be relevant to the program's desired outcomes and objectives, be quantifiable, verifiable and free from bias.

Indicators can be relatively simple, cheap and easy to measure. You can develop these yourself or use existing indicators.

Monitoring and reporting — build into your implementation plan key points at which to check your progress. It is a good idea to give formal progress reports to the group with responsibilities across both tourism and heritage interests. This will help keep attention on what has been achieved and what still needs to be done.

Timeframes for monitoring and reporting are important and should be carefully thought through. You need to allow enough time to determine if the outcomes are successful or whether you have made a significant impact. If unforeseen obstacles arise you may want to report sooner rather than later to avert negative consequences. You also need to consider how much time it takes to collect and collate monitoring data.

Evaluating and reviewing — your plan should also include a timeframe (three to five years is typical). A major evaluation and review should be conducted at the end of this time. This may lead to the plan being refreshed or the process being repeated to produce a new plan.

Keeping track of progress means that efforts can be redirected and management continually adapted to suit changing circumstances.

STEP
9

Reef walkers with tour guide at Heron Island, Great Barrier Reef, Queensland.
Photo and copyright: Great Barrier Reef Marine Park Authority.

STEP 10
Statement of directions

This step will help you to:

- prepare a brief statement summarising the outcomes of the process and your proposals, identifying the:
  - key heritage and tourism assets
  - key issues
  - agreed actions and future directions

If you are writing up a plan, this step is simply like the conclusion or executive summary. It summarises in as succinct a form as possible:

- the key heritage and tourism assets of the region, place or product
- the key issues *and*
- the agreements and outcomes reached between parties.

If you are using this process to run a meeting or series of meetings, or a major project, this step comes at the end so that all the people involved can see what they have achieved and can be clear about the outcomes. There may also be other creative ways to present your outcomes through images or other forms of communication.

Whatever case, you will find this summary very useful for briefing colleagues, superiors and for including in newsletters, electronic information or media materials.

STEP
10

Summary checklist for sustainable tourism plans

A thorough documentation of the 10 steps will be enough to produce a sound basis for a plan, whether a plan for a place, region or a tourism product. The checklist can be used to help you review your own work. It can also be used to review or update existing plans.

STEP 1	**What do we want to do?** Have you/have they: ☐ defined the aims of this process or project? ☐ understood the context for the region, place or project?
STEP 2	**Who is, could be or needs to be involved?** Have you/have they: ☐ identified the key stakeholder groups? ☐ considered when and how people should be consulted and involved? ☐ worked out how to develop effective working relationships?
STEP 3	**What is known?** Have you/have they: ☐ identified existing studies or sources of information relevant to the process or project? ☐ located and summarised data available on the current and potential market for tourism? ☐ determined the key heritage assets, their heritage values and themes?
STEP 4	**What makes this region, place or product special?** Have you/have they: ☐ identified what is special about the region, place or product? ☐ established how well its special values are recognised and currently communicated? ☐ established whether further potential exists to use these special values in tourism and interpretation?
STEP 5	**What are the issues?** Have you/have they: ☐ identified and understood the key issues affecting the region, place or product?
STEP 6	**Analysing issues** Have you/have they: ☐ used further analysis to clarify and prioritise issues? ☐ prepared a succinct summary of the outcomes of the analysis?

STEP 7	**Principles or objectives to guide action** Have you/have they: ☐ developed a clear written statement to guide future actions, such as a set of principles, set of objectives or both? ☐ sought agreement on these principles or objectives from key partners or stakeholders?
STEP 8	**What are your ideas and options?** Have you/have they: ☐ further refined your ideas and if necessary developed options? ☐ worked through ideas and options with key stakeholders and decision makers? ☐ sought agreement on preferred option/s with partners or key stakeholders?
STEP 9	**How to do it?** Have you/have they: ☐ developed actions to implement ideas, proposal or preferred options? ☐ presented them in a clear and logical form? ☐ ensured actions are included in other plans and strategies as necessary? ☐ developed monitoring and evaluation methods? ☐ considered additional factors that will influence achieving objectives?
STEP 10	**Statement of directions** Have you/have they: ☐ prepared a brief statement summarising the outcomes of the process and proposals, identifying: – key heritage and tourism assets? – key issues? – agreed actions and future directions?

Katherine Gorge, Northern Territory. Photo: J McKinnon.
Copyright: Department of the Environment and Heritage.

Resources

There are numerous other sources relating to sustainable tourism, regional tourism and tourism product development. Select sources of further information are listed below. For further information, seek the advice of sustainable tourism development officers based in your state tourism agency, or heritage management advice from the relevant heritage or land management agency.

Ask First: A guide to respecting Indigenous heritage places and values, Australian Heritage Commission, Canberra, 2002.

Australian Natural Heritage Charter for the conservation of places of natural heritage significance. Second edition, Commonwealth of Australia, Canberra, 2002.

Community Planning for Ecotourism: partnerships for sustainable futures, Monash University Graduate School of Environmental Science, 1997.

Developing viable regional tourist accommodation, Part 2 — A practical "how to" guide, Tourism Task Force, Planning Workshop Australia and Arthur Andersen, Sydney, 1998.

EcoRam (Ecotourism Rapid Assessment Model): A simple guide to assessing 'great' ecotourism business ideas), Tourism Queensland, Brisbane, 2001.

Ecotourism: Principles, Practices and Policies for Sustainability, UNEP, Paris, Megan Epler Wood 2002.

Going Places: Developing natural and cultural heritage tourism in Australia Issues Paper, National Tourism and Heritage Taskforce for the Environment Protection and Heritage Ministers' Council, Canberra, 2003.

Ideas for Community Consultation: A discussion on principles and procedures for making consultation work, A report prepared for the NSW Department of Urban Affairs and Planning, February 2001, Dr Lyn Carson and Dr Katharine Gelber

International Cultural Tourism Charter: principles and guidelines for managing tourism at places of cultural and heritage significance, International Council on Monuments and Sites (ICOMOS), ICOMOS International Cultural Tourism Committee, December 2002.

Keeping the Bush in the Game, new approaches to making regional tourism more competitive, Tourism Task Force, Sydney, 2002.

Managing Tourism at World Heritage Sites: a practical manual for World Heritage site managers, Pedersen, A., UNESCO World Heritage Centre, Paris, 2002.

Protecting Heritage Places Information and Resource Kit, Australian Heritage Commission, Canberra, 2001.

Protecting Local Heritage Places: a guide for communities, Australian Heritage Commission, Canberra, 1998.

Protecting Natural Heritage — using the Australian Natural Heritage Charter, Commonwealth of Australia, Canberra, 2003.

Pursuing common goals: Opportunities for tourism and conservation, Commonwealth of Australia, Canberra, 2003.

Successful Tourism at Heritage Places: A guide for tourism operators, heritage managers and communities, Australian Heritage Commission and CRC for Sustainable Tourism, Canberra, 2001.

Sustainable Tourism in Protected Areas – guidelines for planning and management, Eagles, P., McCool, S. and Haynes, C., World Commission on Protected Areas, Gland, Switzerland, 2002.

The Burra Charter: The Australia ICOMOS Charter for Places of Cultural Significance, Australia ICOMOS Incorporated, Burwood, 2000.

Triple Bottom Line Measurement and Reporting in Australia, Suggett, D. and Goodsir, B., The Allen Consulting Group, 2002.

Internet resources

Aboriginal Tourism Australia — www.ataust.org.au

Australian Tourist Commission — www.atc.net.au

Australian Heritage Directory — www.heritage.gov.au

Department of the Environment and Heritage (heritage tourism) — www.deh.gov.au/heritage/tourism/sustainable.html

Ecotourism Australia — www.ecotourism.org.au

Sustainable Tourism Cooperative Research Centre — www.crctourism.com.au

Protected Area Management Agencies in Australia and New Zealand — www.deh.gov.au/parks/hoa/index.html

For additional up-to-date information also check the websites of tourism organisations, park authorities, heritage offices, planning departments and Indigenous authorities in your state or territory.

Glossary

These definitions have been drawn from *Successful Tourism at Heritage Places*, *The Burra Charter*, the *Australian Natural Heritage Charter*, the *Dictionary of Travel, Tourism and Hospitality Terms*, Ecotourism Australia Association, Interpretation Australia Association and the Department of Industry, Tourism and Resources.

Baseline information	Monitoring data acquired prior to the beginning of a project. This provides a basis for comparison and identification of changes occurring over time.
Biodiversity	The variety of life forms: the different plants, animals, and micro organisms, the genes they contain, and the ecosystems they form.
Business plan	A blueprint for the operation of an enterprise containing a statement of the business mission
Carrying capacity	A concept that recognises that for any natural or non-natural environment, there is a capacity (or level of use). When this capacity or level is exceeded, degrees of damage and/or reduced visitor satisfaction can result.
Consultation	A process of discussion between those proposing a course of action and those likely to be affected by those actions.
Conservation	All the processes of looking after a place so as to retain its heritage significance.
Cultural heritage	The ways of living developed by a community and passed on from generation to generation, including customs, practices, places, objects, artistic expressions and values.
Cultural tourism	Tourism that focuses on the culture of a destination — the lifestyles, heritage, arts, industries and leisure pursuits of the local population. It can include attendance at cultural events, visits to museums and heritage places and mixing with local people. Cultural tourism includes Indigenous tourism.
Ecologically Sustainable Development (ESD)	A term used in Australasia to mean development that meets the needs of the present generation without compromising the ability of future generations to meet their needs. Sustainable development is the term more commonly used throughout the world. The term ESD was coined to counter interpretations of sustainable development by some people which placed undue emphasis on economic sustainability alone.
Ecotourism	Ecologically sustainable tourism that fosters environmental and cultural understanding, appreciation and conservation. Its ecological and social responsibility and educational element distinguish it from other tourism which focuses on experiencing natural areas, such as nature-based and adventure tourism.

Environment	Ecosystems and their parts, including people and the cultural qualities and characteristics of places.
Geodiversity	The range of earth features including geological, geomorphological, palaentological, soil, hydrological and atmospheric features, systems and earth processes.
Heritage	Our natural, Indigenous and historic inheritance.
Heritage tourism	Activities and services which provide visitors with the opportunity to experience, understand and enjoy the special values of Australia's natural and cultural heritage.
Indigenous tourism	Tourism which provides visitors with an opportunity to appreciate Indigenous cultures and places of significance or which is either Indigenous-owned or part-owned or employs Indigenous people. It can encompass a wide range of products and services including cultural heritage and nature-based tours, visitor/cultural centres, educational programs, production of art and craft, performances, events, accommodation, transport and hospitality.
Interpretation	A means of communicating ideas and feelings which help people understand more about themselves, their environment and other cultures. The process is commonly facilitated by guides, displays, on-site signage, brochures and electronic media.
Management plan	A document which details how to look after a place. It usually contains a description of the place and its important features, a summary of its significance, and documentation of issues, objectives and strategies. It should include strategies for conservation of heritage significance.
Market	The set of actual and potential buyers of a product or service.
Marketing	The process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, and services to create exchanges that satisfy individual and organisational objectives.
Monitoring	The gathering and evaluation of information to assess performance.
Natural heritage	Consists of ecosystems, biodiversity and geodiversity considered significant for their existence value for present or future generations in terms of their scientific, social, aesthetic and life support value.
Product	In tourism, a service, good, idea, place or person with a set of attributes capable of satisfying the needs of buyers. Key attributes are reputation, price, service guarantee and features of the product or service itself.

Promotion	The means by which a business communicates with its target market/s in order to inform and persuade them, usually as part of a marketing strategy.
Significance	Heritage value. In relation to natural significance means the importance of ecosystems, biological diversity and geodiversity for their existence or intrinsic value, or for present or future generations in terms of their scientific, social, aesthetic and life support value. Cultural significance means aesthetic, historic, scientific, social or spiritual value for past, present or future generations.
Stakeholder	Someone who may be a winner or loser of a decision that influences (positively or negatively) that person or group's wellbeing now or in the future. Stakeholders can include Indigenous people, neighbouring communities, special interest groups, tourism operators, local and regional governments, unions, shareholders and regulatory bodies.
Sustainable	Able to be carried out without damaging the long-term health and integrity of natural and cultural environments, while providing for present and future economic and social wellbeing.
Sustainable tourism	Tourism which can be sustained over the long term because it results in a net benefit for the social, economic, natural and cultural environments of the area in which it takes place.
Tourism	The activities of persons travelling to and staying in places outside their normal place of residence for pleasure, business, holiday, recreation and to visit friends and relatives. It is also the business of providing goods and services to facilitate such activities.
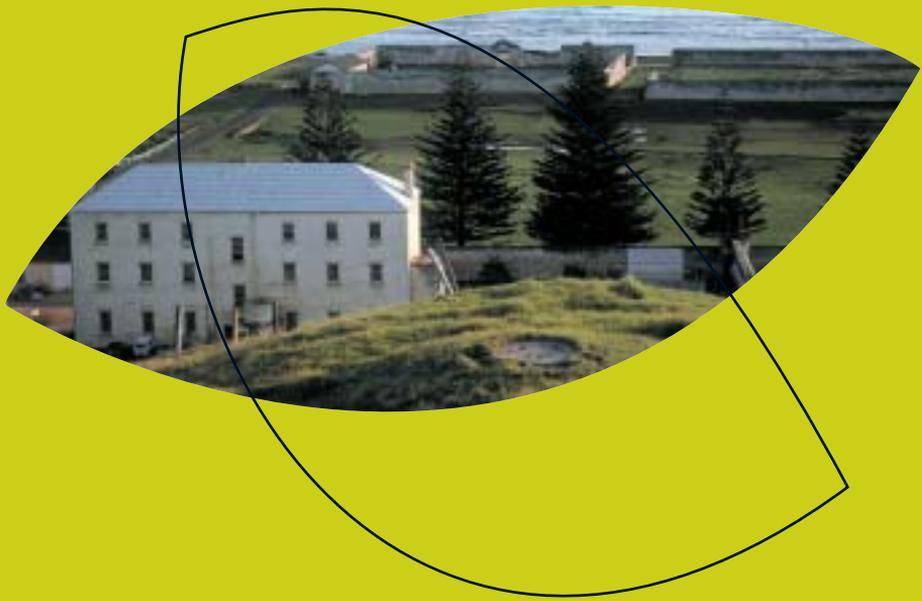
Quality Row, Norfolk Island. Photo: Dr J Kerr.
Copyright: Dr Kerr and the Department of the Environment and Heritage.

Background

These 10 steps have been developed by the Australian Government Department of the Environment and Heritage. They build on previous collaborative work between the Australian Government and the tourism industry particularly in relation to the publication of *Successful Tourism at Heritage Places. Steps to Sustainable Tourism* is a practical planning companion to *Successful Tourism*.

For many years, demand has been growing for a systematic way to integrate the needs of tourism, environment and heritage when planning for places and projects. A review of international experience has indicated that successful heritage tourism requires a well-planned, regionally-coordinated approach based on government and community partnerships. Effective planning processes need to address site management, visitor facilities, tourism services and marketing in a regional context.

The National Tourism and Heritage Taskforce, appointed by the Environment Protection and Heritage Ministerial Council, identified the need to improve communication between tourism, heritage and other stakeholders at the regional level (*Going Places: Developing natural and cultural heritage tourism in Australia* Issues Paper 2003). The Taskforce suggested developing a process to allow for more integrated strategic planning for sustainable tourism at natural and cultural heritage places.

In 2003, the Australian Government Department of Industry, Tourism and Resources released the report called *Pursuing Common Goals* that considered the needs of managing tourism at Australia's protected areas. This report recommends that *'systems that facilitate understanding between protected area managers and tourism operators of their respective needs and perspectives should be encouraged'.*

In addition to protected areas, local government and state tourism organisations have identified similar needs for sustainable tourism management and want to ensure that decision making is focused on balancing the demands of stakeholders.

Developing the *Steps to Sustainable Tourism* process has been underpinned by the comments and insights of a readers reference group. Members of this group have expertise in tourism planning, heritage planning and community development. The methodology of *Steps* has been tested in industry forums, conferences, in focus sessions and through consultation in the field.

The 10-step process follows a basic strategic planning methodology. As such it bears a strong correlation with business planning and regional planning approaches. The focus in *Steps* is on market perspectives in tourism and identifying and protecting natural and cultural values. The process relates to that presented in the *Protecting Heritage Places Kit* and its components (the key recognised Australian standards for natural and cultural heritage conservation):

- the *Australia ICOMOS Burra Charter*
- the *Australian Natural Heritage Charter* and
- *Ask First: A guide to respecting Indigenous heritage places and values.*

During the development of this 10-step process, there has been considerable international interest in the approach, particularly in relation to how it might apply to managing World Heritage sites.

Steps was informed by, and is complimentary to, a number of international documents including:

- the *International Cultural Tourism Charter: principles and guidelines for managing tourism at places of cultural and heritage significance*
- *Managing Tourism at World Heritage Sites: a practical manual for World Heritage site managers* and
- *Ecotourism: principles, practices and policies for sustainability*.

The 10 steps will help meet the needs of various local, state and national processes and will contribute to developing sustainable heritage tourism. They offer a straightforward approach that can assist in bringing together heritage and tourism planning in regions and at heritage places.
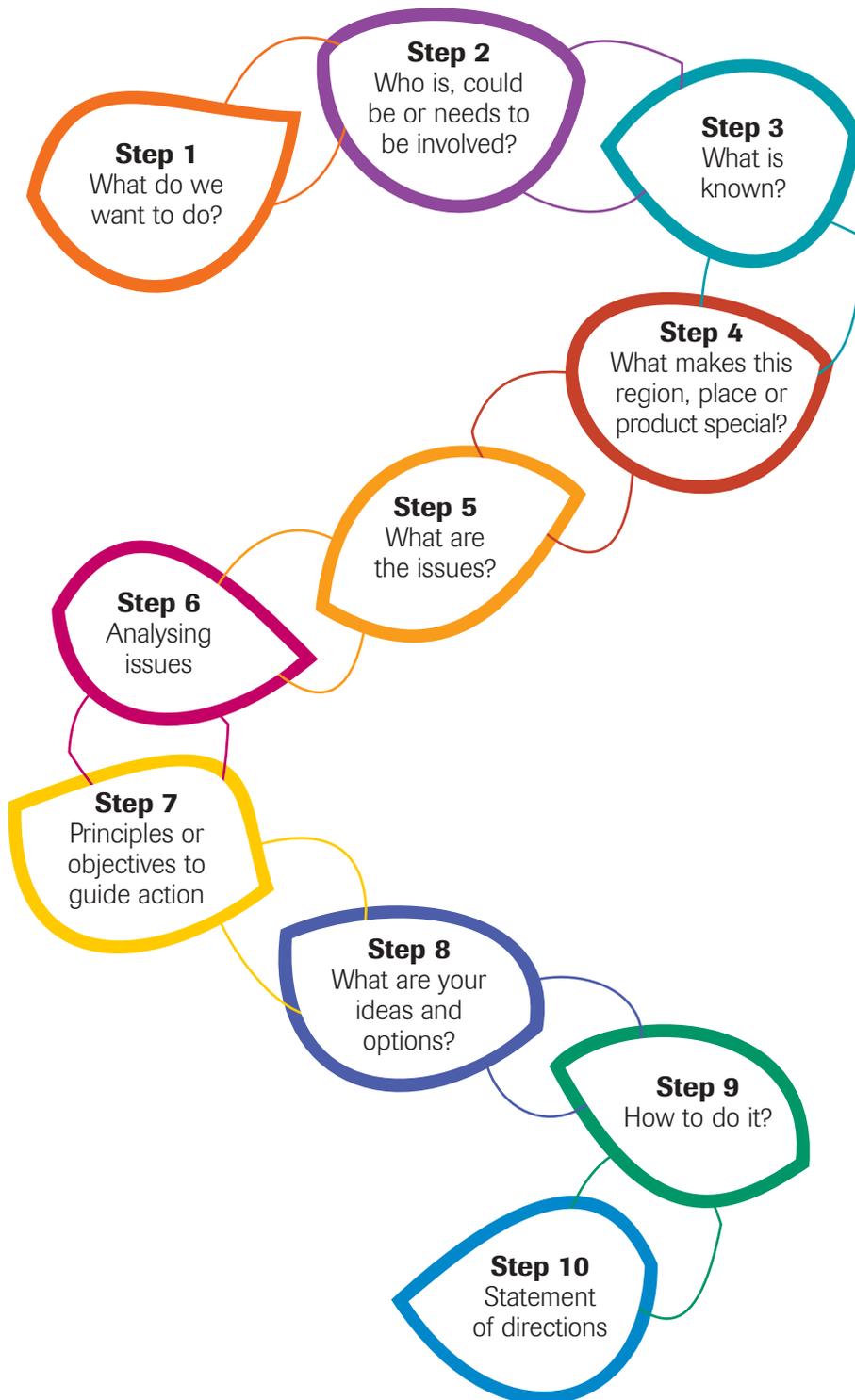
Some final words…

Steps to Sustainable Tourism is an evolving document. We will continue to test it in the field so that it reflects not only good theory, but good practice. If you would like to help us in this process, we would welcome your comments/feedback on your experiences in applying the steps. Please send them to the address below.

We hope to make available as many experiences and case studies as possible to illustrate how all or part of the 10-step process has been applied at actual places. Over time, the process will be supported by professional development and training materials.

Address for comments or to obtain further copies

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The 10 steps to sustainable tourism…

Step 1
What do we
want to do?

Step 2
Who is, could
be or needs to
be involved?

Step 3
What is
known?

Step 4
What makes this
region, place or
product special?

Step 5
What are
the issues?

Step 6
Analysing
issues

Step 7
Principles or
objectives to
guide action

Step 8
What are your
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