



*Applied Strategic Tools and Conservation Innovation*

Centre for Conservation Geography

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# CCG BRIEFING PAPER ON THE ECONOMICS OF THE TERRITORY MARINE AND COASTAL ENVIRONMENT

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Version: 1.0

March, 2017

Type: Independent research commissioned by the Keep Top End Coasts Healthy alliance.

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## TOURISM

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### Key findings:

- The Territory marine and coastal environment is a critical tourism asset generating an estimated 1.7 billion per annum to the NT economy.
- Currently there is a lack of finer scale data on how tourism in the Territory's marine and coastal environment is evolving.
- The development of the *Coastal and Marine Management Strategy* in 2017 offers a key opportunity for game-changing new initiatives to stimulate significant growth in nature and culture-based tourism in the Top End.

### Recommendations:

1. That the Economic Summit and the *Coastal and Marine Management Strategy* work with the proposed Independent Research and Economic Data Unit on identifying and collecting data that can be used to better understand the patterns of economic growth in tourism in the Territory's marine and coastal environment.
2. That the Economic Summit call on the Territory's *Coastal and Marine Management Strategy* to outline ways it could contribute to the creation of innovative new game-changing infrastructure for nature and culture-based tourism.

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<sup>1</sup> Brief biographies in Appendix B.

The *Northern Territory Jobs Plan*<sup>2</sup> identifies tourism as one of five major target sectors for jobs and economic growth.<sup>2</sup> The Economic Summit tourism issues paper states that tourism is the third largest sector of the Territory economy, employing 12% of the Territory workforce.<sup>3</sup> The NT Tourism Vision 2020 aims to grow the Territory Tourism sector by 3.1% per annum.<sup>11</sup> This ambitious growth target, if met, will result in thousands of new jobs and hundreds of millions of dollars injected into the Territory economy.<sup>11</sup> Deloitte's *Building the Lucky Country*<sup>4</sup> report identifies tourism as one of the top five industries most likely to drive economic growth in Australia and the Territory.<sup>5</sup> This is especially important as the mining boom fades.

Using the methods outlined by Deloitte Access Economics in the *AIMS Index of Marine Industries*<sup>8</sup> the marine tourism component of the total tourism spend in the Territory is 924 million.<sup>6</sup> Tourism Australia reports that every dollar spent on tourism, generates 87 cents of activity in other parts of the economy.<sup>7</sup> The total value of marine tourism to the Territory economy is thereby estimated at \$1.7 billion per annum. This represents about 3% of the Australia-wide value of marine tourism and recreation.<sup>8</sup>

The economics summit tourism issues paper notes that tourism growth has been slower in the Territory's Top End, and suggests that the Territory's tourism offerings must evolve to keep pace with travellers' needs and wants.<sup>3</sup> The *AIMS Index of Marine Industry (2016)*<sup>8</sup> records 5% year-on-year average growth in marine tourism and recreation across Australia since 2001/2002. With slower growth in tourism in the Territory's Top End it would appear that other parts of Australia may have developed a competitive advantage over the Territory in benefiting from this strong growth in marine tourism.

*Australia's Timeless North National Landscape Experience Development Action Plan*<sup>9</sup> identifies the following two types of experience as the key to attracting high value 'experience seekers' to the Top End:

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<sup>2</sup> <https://territorylabor.com.au/Portals/territorylabor/JobsPlan.pdf>

<sup>3</sup> <https://economicsummit.nt.gov.au/background-and-resources/government-papers-and-fact-sheets/tourism-infrastructure-and-product-development>

<sup>4</sup>

<https://www2.deloitte.com/content/dam/Deloitte/au/Documents/Building%20Lucky%20Country/deloitte-au-btlic-business-positioning-prosperity-2014-230217.pdf>

<sup>5</sup> <https://www2.deloitte.com/au/en/pages/media-releases/articles/new-frontiers-for-top-end-240314.html>

<sup>6</sup> Deloitte Access Economics uses a multiplier of 40% for domestic tourism and 19% for international tourism to provide a broad indication of the scale of marine tourism activity. These figures are based on an Australia wide approach. The Coastal and Marine Management Strategy should consider commissioning new research on what Territory specific multipliers would be. Figures for the spend by domestic and international tourists in the Territory were sourced from [http://www.tourismnt.com.au/~media/files/corporate/research/quick\\_stats\\_ye%20september%202016.ashx](http://www.tourismnt.com.au/~media/files/corporate/research/quick_stats_ye%20september%202016.ashx)

<sup>7</sup> <http://www.tourism.australia.com/documents/corporate/Tourism-Australia-Annual-Report-2013-2014.pdf>

<sup>8</sup> <http://www.aims.gov.au/documents/30301/0/AIMS+Index+of+Marine+Industry+2016/f2f7f8f3-6ae3-4094-b8d4-cb8aa90f5ae1>

<sup>9</sup> [http://www.tourism.australia.com/documents/Campaigns/NL\\_EDAP\\_ATN.pdf](http://www.tourism.australia.com/documents/Campaigns/NL_EDAP_ATN.pdf)

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*“Be inspired to connect to the spectacular nature and culture of this land. Understand some of the inextricable links between nature and culture through the exploration of the habitat according to traditional values.*

*Immerse yourself in a timeless landscape and connect to the restorative powers of an ancient spirituality.”*

There is currently a lack of publicly accessible data that makes it possible to easily track how tourism in the marine and coastal environment of the Top End tourism is evolving. The Territory Government is committed to establishing an Independent Research and Economic Data Unit to improve productivity and job creation through access to data. <sup>2</sup> Providing more granular data on tourism in the Top End’s marine and coastal environment is one way this data unit could add significant value to both the Territory’s *Jobs Plan* and *Coastal and Marine Management Strategy*.

The Territory Government discusses the economic importance of the Territory natural environment in its *Healthy Environment, Strong Economy* <sup>10</sup> policy. This policy states that the Territory’s “unique natural environment is one of our greatest assets” <sup>10</sup> and offers this as a key point of difference compared to other tourism destinations in Australia and globally. <sup>10</sup> The Territory’s *Tourism Vision 2020* <sup>11</sup> describes the Territory’s competitive strength as being “based on its unique nature, culture and outback experiences.” For all international tourists visiting Australia, aquatic wildlife is number one on the list of top Australian experiences. <sup>12</sup> The Territory’s marine and coastal environment contains abundant aquatic wildlife that are rare or have become locally extinct in other parts of Australia and the world. This includes remarkable or charismatic species like turtles, dugong, coastal dolphins, seabirds, sharks and sawfish. Currently more than 80% <sup>13</sup> of international visitors to the Top End seek out nature-based activities, making the Territory’s marine and coastal environment a critical tourism asset.

The Economic Summit tourism issues paper prioritises increasing visitation from China. <sup>3</sup> The Tourism Australia Consumer Demand Project Coastal Report shows that the number one factor in destination choice for Chinese visitors is world-class beauty and natural environments. <sup>14</sup>

The Territory Government has an opportunity to take advantage of these strengths through its *Coastal and Marine Management Strategy*. This Strategy was first articulated as part of the 2016 Territory Labor Platform (see Appendix A) and reinforced in the *Protecting our Marine Environment* <sup>15</sup> policy. The *Coastal and Marine Management Strategy* offers an opportunity to maintain and improve the health of the environment,<sup>10</sup> and to establish innovative and potentially game changing community-led tourism infrastructure. The Government has identified these as important factors in enabling economic growth in the tourism sector.

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<sup>10</sup> <https://territorylabor.com.au/Portals/territorylabor-staging/docs/HealthyEnvironmentStrongEconomy.pdf>

<sup>11</sup> [http://tourismnt.com.au/~//media/files/corporate/strategies/tourism-vision-2020-strategy-for-growth\\_northern-territory\\_australia.ashx](http://tourismnt.com.au/~//media/files/corporate/strategies/tourism-vision-2020-strategy-for-growth_northern-territory_australia.ashx)

<sup>12</sup> [http://www.tourism.australia.com/documents/TASI9055\\_Coastal\\_Factsheet\\_DestAusCon-V6.pdf](http://www.tourism.australia.com/documents/TASI9055_Coastal_Factsheet_DestAusCon-V6.pdf)

<sup>13</sup> 84.2% based on the Tourism Research Australia datasets for the Darwin, Kakadu/Arnhem and Katherine/Daly regions <[http://tra.gov.au/Tourism\\_Region\\_Profiles/Region\\_profiles/index.html](http://tra.gov.au/Tourism_Region_Profiles/Region_profiles/index.html)>

<sup>14</sup> [http://www.tourism.australia.com/documents/Statistics/TA\\_Factsheet\\_CDP\\_Coastalreport.pdf](http://www.tourism.australia.com/documents/Statistics/TA_Factsheet_CDP_Coastalreport.pdf)

<sup>15</sup> [https://territorylabor.com.au/Portals/territorylabor/ProtectingOurMarineEnvironment\\_1.pdf](https://territorylabor.com.au/Portals/territorylabor/ProtectingOurMarineEnvironment_1.pdf)

For example, could new marine national parks,<sup>16</sup> and protected areas designed to maintain and enhance recreational fishing values under the *Coastal and Marine Management Strategy* be game-changing additions to the Territory's tourism infrastructure?

Protected areas can be key drivers of visitation, particularly for those seeking high quality experiences of nature.<sup>11</sup> The West Australian Government recognised this in its *Kimberley Science and Conservation Strategy*.<sup>17</sup> In the Kimberley the government made major investments in nature-based and cultural tourism. Firstly, via physical infrastructure like visitor facilities and upgrading remote area airstrips. Secondly, by creating the Great Kimberley Marine Park, a bold visionary idea in the vein of the Great Barrier Reef Marine Park, whose protected status and spectacular nature and aquatic wildlife can be used to market the area to potential visitors. Over the last 40 years the Great Barrier Reef Marine Park has become a key component of the North Queensland tourism industry worth more than \$5 billion per year.<sup>18</sup> The Territory's lack of a similar large visionary marine park is likely to burden it with an increasing competitive disadvantage in attracting visitors seeking an experience involving tropical marine life. In this sense marine park planning needs to include consideration of the role some marine parks can play as critical infrastructure for tourism and regional economic development.

Equally, could the Territory Government's support of new Seacountry Indigenous Protected Areas (IPAs) under the *Coastal and Marine Management Strategy* be a game-changing initiative for increasing Traditional Owners' capacity to initiate and manage new and evolving tourism opportunities?

In 2013 the Yolngu Wanga Watangu, supported by the Commonwealth and Northern Territory Governments, declared Australia's first Seacountry IPA.<sup>19</sup> This was an Indigenous-led innovation springing from Traditional Owners' desire to protect and manage their seacountry. The Territory Government is committed to Indigenous-led decision making under its *Respect, Partnership and Opportunity*<sup>20</sup> policy. Additionally, innovation is a core theme of the *Northern Territory Jobs Plan*<sup>2</sup> and a stated focus of the economics summit. Other Traditional Owners in the Territory have also declared interest in establishing seacountry IPAs.<sup>21, 22, 23</sup> The 2016 Territory Labor platform names seacountry IPAs, along with protected areas to maintain and enhance recreational fishing values and jointly managed marine national parks as approaches for the Coastal and Marine Management Strategy to consider (see Appendix A). The *Yolngu Cultural Tourism Masterplan*<sup>24</sup> points out that Arnhem land is "one of the last great undiscovered destinations". The *Yolngu Cultural Tourism Masterplan* outlines a desire for a partnership approach to helping them to establish Arnhem land as a new global destination for tourism.<sup>24</sup> Such a designation would lead to significant change and exciting opportunities, though it has

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<sup>16</sup> See Appendix A: 2016 Territory Labor Platform

<sup>17</sup> [https://www.dpaw.wa.gov.au/images/documents/conservation-management/kimberley/kimberley\\_science\\_conservation\\_strategy.pdf](https://www.dpaw.wa.gov.au/images/documents/conservation-management/kimberley/kimberley_science_conservation_strategy.pdf)

<sup>18</sup> <https://www.environment.gov.au/system/files/resources/a3ef2e3f-37fc-4c6f-ab1b-3b54ffc3f449/files/gbr-economic-contribution.pdf>

<sup>19</sup> Dhimurru Aboriginal Corporation, 2013. *Dhimurru launches sea country IPA management plan*, <<http://www.dhimurru.com.au/sea-country-ipa-management-plan-launch.html>>

<sup>20</sup> <https://territorylabor.com.au/Portals/territorylabor/RespectPartnershipOpportunities.pdf>

<sup>21</sup> <http://www.environment.gov.au/indigenous/publications/pubs/yanyuwa.pdf>

<sup>22</sup> <http://anindilyakwa.com.au/uploads/images/ALC-15-YEAR-STRATEGIC-PLAN-FINAL.pdf>

<sup>23</sup> [http://cicada.world/files/Djelk\\_Healthy\\_Country\\_Plan.pdf](http://cicada.world/files/Djelk_Healthy_Country_Plan.pdf)

<sup>24</sup> [http://www.tourism-generis.com/\\_res/file/4289/49/0/yolnguculturaltourismmasterplan\\_3r.pdf](http://www.tourism-generis.com/_res/file/4289/49/0/yolnguculturaltourismmasterplan_3r.pdf)

some risk. Supporting Indigenous-led planning for new seacountry IPA's are one additional mechanism by which the Territory Government could increase Traditional Owners' capacity to manage and plan for these changes and risks in a way that is community-led and could foster more control at the Traditional Owner level and pace rather than imposition from other parties. Following due process under the Aboriginal Land Rights Act, Native Title Act and Sacred Sites Act will assist.

The Economic Summit tourism issues paper states that it is "*time to identify 'game changing' initiatives that will achieve the ongoing growth and sustainability of the tourism industry.*"<sup>3</sup> The economics summit should call on the *Coastal and Marine Management Strategy* to explore ways it could contribute to the creation of innovative new game changing infrastructure for nature and culture-based tourism.

**Key findings:**

- The Territory marine and coastal environment is a critical tourism asset generating an estimated 1.7 billion per annum to the NT economy.
- Currently there is a lack of finer scale data on how tourism in the Territory's marine and coastal environment is evolving.
- The development of the *Coastal and Marine Management Strategy* in 2017 offers a key opportunity for game-changing new initiatives to stimulate significant growth in nature and culture-based tourism in the Top End.

**Recommendations:**

1. That the Economic Summit and the *Coastal and Marine Management Strategy* work with the proposed Independent Research and Economic Data Unit on identifying and collecting data that can be used to better understand the patterns of economic growth in tourism in the Territory's marine and coastal environment.
2. That the Economic Summit call on the Territory's *Coastal and Marine Management Strategy* to outline ways it could contribute to the creation of innovative new game-changing infrastructure for nature and culture-based tourism.

## APPENDIX A: 2016 TERRITORY LABOR PLATFORM

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In 2016 Territory Labor passed the following resolution as part of its 2016 platform:

*“Develop a **coastal and marine management strategy**. The strategy will be a science based and consultative approach to management and conservation involving all Territorians. The strategy will commence operation in 2018.*

*Develop a **network of coastal and marine protection measures**, which will act as an insurance policy for the Territory’s unique lifestyle and its natural and cultural resources. Measures will be Territory specific, including Indigenous Seacountry protected areas, zones that protect and enhance recreational fishing values and opportunities, and jointly managed marine national parks, working alongside fisheries management.*

*This new network will include adequate resources for community engagement, science assessments, joint management, structural adjustment and monitoring. The completion of the Limmen Bight Marine Park in 2017 will be the first milestone, half the network delivered by 2019, and the full network completed by 2022.”<sup>25</sup>*

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<sup>25</sup> Pers comm. Michelle Grady via email 14/02/2017.

## APPENDIX B: ABOUT THE AUTHORS

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### CENTRE FOR CONSERVATION GEOGRAPHY

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The Centre for Conservation Geography is a research group established in June 2011 to provide expert technical support and advice to government and non-government decision-makers and stakeholders.

The centre applies world's best practice in decision support to biodiversity conservation planning. Based in Australia, our goal is to build a multi-disciplinary team capable of providing support to conservation decisions being made across the world's ecoregions.

The Centre for Conservation Geography currently has projects in Australia and in the Southern Ocean. Our areas of expertise are in marine and terrestrial protected area planning, including protected area performance assessment, cost-efficient conservation priority setting and planning for multiple objectives (e.g. carbon sequestration and biodiversity protection).

<http://www.conservationgeography.org/>

### BRIEF BIOGRAPHIES:

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#### DANIEL BEAVER

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Daniel is the director of the Centre for Conservation Geography, a visiting scholar at San Francisco State University's Marine & Coastal Conservation and Spatial Planning Lab, and an adjunct research fellow at the Centre for Biodiversity and Conservation Science at the University of Queensland.

He has over 15 years of experience in the theory and practice of systematic conservation planning both on land and in the ocean, and has been engaged in planning for marine protected areas and marine sanctuaries in Australia since 2004.

#### THOMAS KEILY

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Thomas Keily graduated with first-class honours and a university medal in economics from the University of Queensland in 2000 and spent 6 years working at the Reserve Bank of Australia. Since then, Tom has consulted to a range of industries, including the public sector, transport and real estate, specialising in market analysis, economic modelling and forecasting.

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## JOEL TURNER

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Joel completed a Bachelor of Science (environmental) with honours in 2006 and a Masters in Conservation Biology in 2013 and has been engaged in research with the Centre for Conservation Geography since 2008. In that time his major areas of research have been the review and analysis of Australia's National Representative System of Marine Protected Areas (NRSMPA) and the classification of benthic marine environments in the Southern Ocean.

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## KATE FRITZ

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Kate Fritz is a writer and communications professional whose work focuses on the intersection of the environment and social change. Kate holds a BA degree in Chinese and Environmental Policy from The Gallatin School at New York University. She lived in Kunming, China from 2009 to 2011, where she studied land rights policy affecting nomadic people in China's first national park. She is a recipient of the Morris K Udall award for environmental leadership granted by the US congress.

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## ACKNOWLEDGEMENTS

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The Marine & Coastal Conservation and Spatial Planning Lab, San Francisco State University, and the Centre for Biodiversity and Conservation Science, The University of Queensland, provi