

ESSAY: DELIVERING THE SOCIAL AND ECONOMIC BENEFITS OF HERITAGE TOURISM

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Bruce has had a long career in conservation management and nature based tourism in three states and the Commonwealth. He continues this focus as Chair of Sapphire Coast Tourism on the far south coast of NSW. He is also Chair of that region's National Parks and Wildlife Reserve Advisory Committee and Chair of the Nature and Heritage Tourism Advisory Group to the NSW Government's Tourism Visitor Economy Task Force.

Bruce was head of the Heritage Division in the former Department of Environment and Heritage and the last Executive Director of the Australian Heritage Commission. He oversaw the development and enactment of the new National and Commonwealth heritage provisions in the EPBC Act. His final years with the Commonwealth were taken up with Parks Australia in the development of the National Landscapes program in partnership with Tourism Australia.

Bruce has served on key committees including the conservation management advisory committee and the tourism advisory committee for the Great Barrier Reef Marine Park and the liaison committee that oversees the operation of the intergovernmental Australian Alps Management Agreement.

INTRODUCTION

Traditionally the identification and preservation of heritage has been driven by community aspirations about preserving connections with history and ancestry as part of the national identity. Heritage conservation can be expensive, both to the public purse and for property owners. The expense may lie in the cost of restoring and conserving the fabric of a place or the cost of economic opportunities foregone in alternative use of the site. Heritage tourism can provide an economic reason to preserve that heritage. No heritage, no heritage tourism.

An added benefit from heritage tourism is the chance to change community perceptions of the way in which heritage places should be treated. They learn about, as well as enjoy the experience.

There are examples of strategic approaches that have been developed for heritage tourism. However, few initiatives have produced a tactical framework that plans and delivers heritage tourism to the visitor. Most have focused on what tourism deliverers should not do – rather than on what they can do and how they can do it.

The statistics of domestic tourism generally indicate a gloomy picture for regional Australia but there is one area of projected growth – heritage tourism.

It is timely to develop an approach that enables the social and economic benefits of heritage to be realised. Whilst conserving the intrinsic value of the heritage the approach must be one that fosters regional partnerships between the community, managers and tourism and clearly sets out the way for implementation and ongoing delivery.

This essay discusses some initiatives that develop a strategic approach and gives an example of the way in which heritage tourism can be implemented at the regional level.

HERITAGE TOURISM

Heritage tourism is particularly relevant to the social and economic well being of communities. It is the one activity forecast for growth in an otherwise stagnant domestic tourism market. Heritage tourism utilises the cultural and historical capital of a region and contributes to the growth of a sector that, in many areas, has replaced traditional resource based industries.

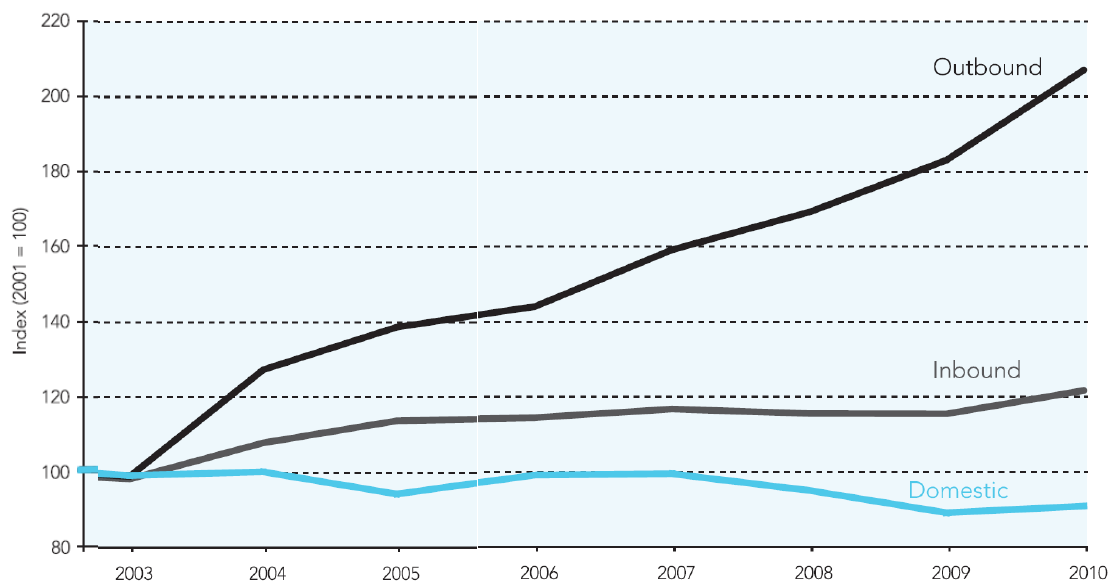
Heritage tourism also puts an economic value on heritage assets, thereby contributing to their preservation for future generations.

THE STATE OF AUSTRALIAN TOURISM

Tourism is worth over \$90billion to the economy. It contributes \$24b (over 10%) to export earnings and 4.7% of total employment.

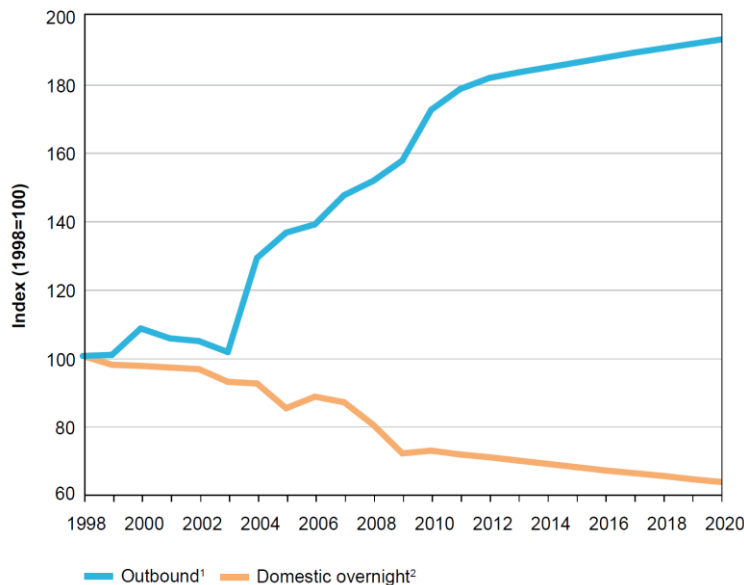
Domestic tourism is stagnant. The biggest growth area is outbound – the numbers travelling overseas have increased on average 7% pa since 1999 (in 2010 it was over 14%), boosted by an appreciating Australian dollar.

Domestic tourism represents about three quarters of the value of the Australian tourist industry. Many regional economies are now highly dependent on the tourism sector where it has supplanted traditional industries.



Tourism Industry Facts and Figures at a Glance - May 2011, Dept. Resources Energy and Tourism

Projections relating to the propensity to travel overseas holds little comfort.



Travel by Australians – March 2010 Quarterly Results of the National Visitor Survey, Tourism Research Australia

Tourism Research Australia's report, *Through the looking glass: The future of domestic tourism in Australia* (2008) considered a wide range of economic and demographic factors. The analysis included predictions for the range of activities travellers participate in including (p36):

The largest average annual growth is in cultural and heritage activities, forecast to increase by 1.7% per year on average between 2006 and 2020.

Heritage tourism has the following features which are particularly appealing to regional social well being:

- based largely on existing infrastructure
- offers tourism diversification away from the (often) heavy reliance on existing resort areas and peak seasons
- establishes heritage structures and landscapes as economic assets
- engenders respect and value for the social history of communities that have been marginalised through changes to the economic base and demography.

DELIVERING HERITAGE TOURISM

Tourism is highly competitive. Regions fiercely defend their market share in the contracting domestic market so the development of new product has to be highly professional, making use of destination branding principles.

Branding Principles

1. Focus on a tightly defined target market and the most compelling offering to that market.
2. It is not the physical features of a destination that appeals to a visitor but rather an outstanding experience of those features.
3. The experience must differentiate the place from anywhere else.
4. Get it right for the few ideal visitors and the rest will respond – always.

The message appears in various forms, for example Amy Webb, Director of Heritage Tourism, US National Trust for Historic Preservation:

Focus on what your byway has that is truly unique and different. Focus on the qualities that separate your location from anywhere else in the world. That's your hook. That's your marketing angle. That is what visitors are looking for. As we become more homogenous, people are looking for those special one-of-a-kind places.

Focus is the key. Although it seems counter-intuitive, the smaller the target market is, the greater the chance of success. There is no need to address different sectors of the tourist market and their expectations of interest. Trying to be all things to all people just clutters up the message.

A heritage tourism target market

A region will rarely have the resources to undertake research to develop a market profile. A useful surrogate is Tourism Australia's 'Experience Seeker' target market. This has been thoroughly researched and is applied to the promotion of both the international market and the domestic market. They:

- are experienced travellers
- seek out and enjoy authentic personal experiences they can talk about,
- involve themselves in activities, are sociable and enjoy engaging with locals
- are active in their pursuits and come away having learnt something
- are adventurous and enjoy a variety of experiences on any trip
- place a high value on contrasting experiences (i.e. different from their day-to-day lives).

The most compelling proposition for the target market visitor

The market positioning must be directed towards providing experiences rather than merely interpreting landscape, buildings and artefacts. These physical elements must be translated into a living story. The aim is to elicit an emotional connection between the heritage and the visitor. This is the hardest part – and it has to differentiate the place from any where else.

Barriers

The barriers to the development of heritage tourism are:

- mutual lack of knowledge between the heritage and tourism sectors and about the opportunities of heritage tourism
- lack of formal linkages between culture and tourism at government and working levels
- 'Heritage' ambivalence about tourism, driven by concerns about sustainability and commercialism
- lack of knowledge about the economic impact of heritage tourism
- lack of resources to develop and market heritage products
- lack of education and training related to heritage tourism
- distance and access problems outside the major urban areas
- lack of market-ready, packaged product (outside the major urban centres)
- minimal marketing of heritage.

Significant government cut backs to facilities and human resources also represent a major challenge.

Sound familiar? The above are from the Canadian *Five Year Business Strategy for Cultural and Heritage Tourism*.

EXISTING APPROACHES TO AN OVERARCHING HERITAGE TOURISM STRATEGY

The importance of heritage tourism has been increasingly recognised over the last decade. There have been a number of government responses, for example:

- Australian Heritage Commission 2001 *Successful Tourism at Heritage Places – A Guide for Tourism Operators, Heritage Managers and Communities*.
- Environment Protection and Heritage Ministerial Council 2003 *Going Places: Key opportunities for natural and cultural heritage tourism in Australia*.
- WA Heritage Council and Tourism WA 2006 *A Heritage Tourism Strategy for Western Australia*.
- NZ Ministry for Culture and Heritage 2008 *New Zealand Arts, Cultural and Heritage Tourism Strategy to 2015*.

The general approach has been to provide a code to underpin heritage based tourism, or to provide some overarching tourism development themes, without identifying tangible steps to practical implementation.

Western Australian Heritage Tourism Strategy

The Western Australian strategy progressed heritage tourism towards practical implementation. The strategy was based on *Heritage and Tourism Themes for Western Australia*, prepared for the Heritage Council of WA and Tourism WA. The report aimed to identify the historic themes that provide the greatest potential for tourism. These themes were: Indigenous, Maritime, Convict, Ecclesiastical, Gold Rush, Rail, Military, Timber and north Kimberley.

The report also examined the importance of historic routes that link several of the themes to provide visitor dispersal strategies. The report proposed a range of between 8 and 20 routes.

The stories associated with these routes are:

1. The First Australians: The world's boldest pioneers and their unique culture.
2. Discovering Australia: Explorers, Pirates and Mutineers.
3. A Fatal Shore: Convict transportation and its legacy.
4. The Old Spanish Mission Trail.
5. Gold Rush: how the world scrambled to get a piece of the action in the 1890s.
6. Great railway journeys of the world: 'The Indian-Pacific', 'The Prospector' and other famous trains of the golden west.
7. A World at War at the end of the earth: Australia in two World Wars.
8. Avenue of the Giants: Australia's karri and tingle big tree country.
9. Heritage of the Never-Never. Western Australia's Gibb River Road.
10. Two Weeks Discovering Historic Perth.

The report recommended further studies to establish subsidiary, historically themed cultural routes at regional, local and municipal levels. It was intended that these routes be developed around significant clusters of Heritage Council and the National Trust of WA listed places.

The heritage tourism strategy indicated that specific projects and initiatives were to proceed with different partners on a case-by-case basis under a Heritage Tourism Advisory Group. It proposed that appropriate levels of support would be provided for heritage tourism projects with national, regional or local significance. No further progress on the strategy has been recorded to date.

What needs to be done

The examples of heritage tourism strategies given above illustrate how straightforward, conceptually, the development of such strategies seems to be, and how difficult it is to implement them in practice.

The branding principles are clear: identify and deliver the unique and compelling heritage experiences the region can offer to a curious, educated and discerning target market. Delivery, however, is an arduous journey sorting through variously listed heritage assets, different management arrangements, traditional barriers and rivalries and a suite of passionate stakeholders not necessarily sharing a common passion.

Heritage listings have proliferated in Australia. There are places listed for World, National, Commonwealth, State and local heritage significance, many of which are also on the Register of the National Estate and National Trust lists. The challenge in a tourism strategy is both to leverage off icon listings as marketable designations of excellence and to cut through what is often a plethora of regional listed places, to focus on only those places that will provide a compelling experience to a target market. A task potentially fraught with tension.

SAPPHIRE COAST HERITAGE TOURISM STRATEGY – A CASE STUDY

The Sapphire Coast Heritage Tourism Strategy is a case study in the development and implementation of a regional heritage tourism strategy.

The Sapphire Coast is on the far south coast of NSW abutting the Victorian border. It covers the area of Bega Valley Shire Council. The traditional industries in the region have been fisheries, forestry and agriculture. Tourism now represents over 50% of the local economic base and employment. Ninety-six percent of tourism in the area serves the domestic market, mainly focused on summer holiday beach resort recreation mainly for the Melbourne, southern NSW and ACT markets. Tourism activity has remained stable in the current domestic tourism downturn, but there seems to be little opportunity for market growth, or resilience within the contracting market.

The Sapphire Coast, extending from southern NSW into Victoria, has outstanding natural coastal landscape qualities. It was selected as one of the first eight sites in the Tourism Australia and Parks Australia *National Landscapes Program* – identified under the brand *Australia's Coastal Wilderness*. This Program is identifying the top 15 Australian natural/cultural experiences for international marketing to the *Brand Australia* target market. The *National Landscapes Program* can be viewed on www.australia.com.

The brand name is Australia's Coastal Wilderness (ACW). The region has extensive tracts of undeveloped coastline with tall temperate forests extending to the beaches, coastal lagoons and estuaries, against a backdrop of forested coastal ranges. Most of the ACW coastal areas are in the NSW and Victorian National Park systems.



Lake Barracoota, Malacoota, Victoria Phil Rickards

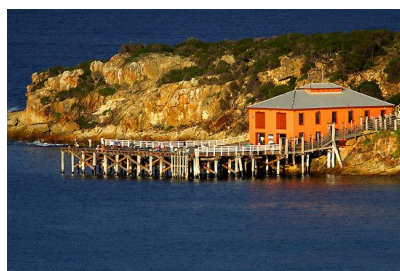
Whilst the *National Landscapes Program* is aimed primarily at the inbound tourism market, a sub-agenda is to entice the current outbound market to stay in Australia to experience the world class experiences in their own country.

ACW has been subject to a destination branding program overseen by Tourism Australia. An Experiences Development Plan has been completed that sets out the visitor facilities and services needed to deliver the experience to the *Brand Australia* target market. National park plans of management and other planning instruments are being modified to deliver the tourism product across the various tenures in the region, ensuring that any tourism activity is undertaken in a mutually supporting and sustainable way across the different jurisdictions and land tenures.

The *National Landscapes Program* is a first in Australia – whereby nature based/cultural tourism has been planned at the landscape scale, encompassing the suite of different tenures and straddling state borders.

An increase in international visitors to the area is already recorded. From a tourism management perspective this is highly desirable because, for most of the year, the infrastructure of the region is under-utilised. From a heritage tourism perspective, the increase in numbers of this class of visitor provides an opportunity to develop experiences and product relating to their aspirations, thus moving away from the sole focus on the peak summer beach recreation market and dispersing tourism into the greater region.

Developing compelling experiences for a narrowly defined target market does not exclude other visitors. Industry experience is that, getting it right for the target market, gets it right for other markets, including those that haven't even been considered.



Heritage listed Tathra wharf

In 2009 the Sapphire Coast regional tourism body decided to extend its strategic approach to tourism, building on the ACW branding and planning work. Whilst the target market may be enticed by stunning coastal landscapes, the broader strategy aimed to extend the visitor's stay by developing other regional experiences of potential interest to that market. Heritage tourism was chosen as the basis of this strategy because it aligned with the visitor profile of the *Brand Australia* target market and aligned with the one activity identified for domestic market growth.

From a marketing perspective this broader strategic approach provided the opportunity to present the region's compelling heritage tourism experiences, for both the international and domestic market, one click away from the National Landscapes portal on www.australia.com which is supported by Tourism Australia's considerable investment in promotion, product development and media engagement.

The strategy was developed through the assistance of a Commonwealth TQUAL matched funding grant. The strategy is at:

<http://www.sapphirecoast.com.au/Sapphire%20Coast%20Heritage%20Tourism%20Strategy%20-%20Final%20Updated%2014th%20December.pdf>

Development of the strategy – oversight

The drafting of the strategy was undertaken by a branding/planning professional overseen by a supervisory group convened for the purpose. The group was chaired by a director from the local tourism association. Members included:

- the shire council Cultural Services Coordinator
- a regional gallery curator
- a historic site manager
- the Chair of an iconic cultural music festival
- a historian
- the executive officer of the regional arts board
- a gourmet chef
- the executive officer of a regional scientific marine discovery centre
- the president of an historical society
- a museum curator
- a representative of the Australia's Coastal Wilderness Steering Committee
- the NSW National Parks and Wildlife Service.

The group has resolved to continue seeking Indigenous membership.

Guiding principles

The development of the strategy has been based on a number of key guiding principles to ensure that the outcome is practical and feasible. They are:

- The aim of the Sapphire Coast Heritage Tourism Strategy is to **identify key heritage tourism stories** that will inspire the 'Experience Seeker' market to visit the region and extend their length of stay and increase spending in the local economy.

- The Sapphire Coast is home to a wide range of cultural and natural heritage products, experiences, attractions and stories, but there is a need to **clearly interpret and promote** these in a way that is meaningful and accessible to the visitor.
- In this way, the Strategy does **not attempt to provide a history of the region** and identify every heritage tourism story, product or experience. The strategy has instead identified **key 'iconic stories'** that can set the region apart, build strong consumer awareness and deliver a world class experience.
- There is a wide range of personal experiences and interpretation of historical events and stories. Everyone has the right to tell their own stories either from their personal experience or family connections. While some stories may be debated the **stories identified in the strategy have been confirmed and agreed** by a number of different sources to ensure their accuracy.
- The interpretation and delivery of **Australian Indigenous heritage and cultural stories** is designed to provide only a 'taste' of the story – with the full stories and intellectual property being protected and only told by Aboriginal people if appropriate. The stories and beliefs presented in this strategy have been **endorsed by the Traditional Owners**.
- The Sapphire Coast Heritage Tourism Strategy provides a '**story architecture**' that is **designed to evolve over time** as new stories are created and historical stories are debated from different perspectives.

It was emphasised that, while not every heritage story is captured in the strategy, it is important that all stories are documented and discussed. A blog provided a forum in which community and industry stakeholders share their own stories of the history and culture of the region.

Identifying the iconic stories

Through the stakeholder consultation process, the top ten heritage stories for the region were identified:

- Meeting of the Waters
- Naturally Inspired
- Killers of Eden
- The Tyranny of Distance
- Out of Sight, Out of Mind
- Inspiring Endeavours
- The Bundian Way Indigenous route
- In the Shadow of the Mountains
- Against All Odds
- Paradise Found

The next stage identified those key stories that set the region apart and could build strong consumer awareness. Selection criteria were developed to assess the ten identified stories and to determine the strategy's three key 'iconic stories'.

The criteria are:

- **Consumer focused** – those stories that clearly deliver the experiences or products most desired by the international “Experience Seeker”
- **Differentiated** – those stories that are most clearly different from what you can experience and hear about elsewhere
- **Linked to wilderness** – those stories that reflect and embody the essence of Australia’s Coastal Wilderness
- **Connected** – those stories that link a number of experiences and market ready (or soon to be) products to deliver a complete story
- **Supported** – those stories with strong local/ grass roots support.
- **Culturally Inclusive** – those stories that incorporate both Indigenous and European culture, stories and products.

The strategy describes each of the stories and details the products, experiences and practices that deliver the story. The stories are summarised:

ICONIC STORY 1: KILLERS OF EDEN

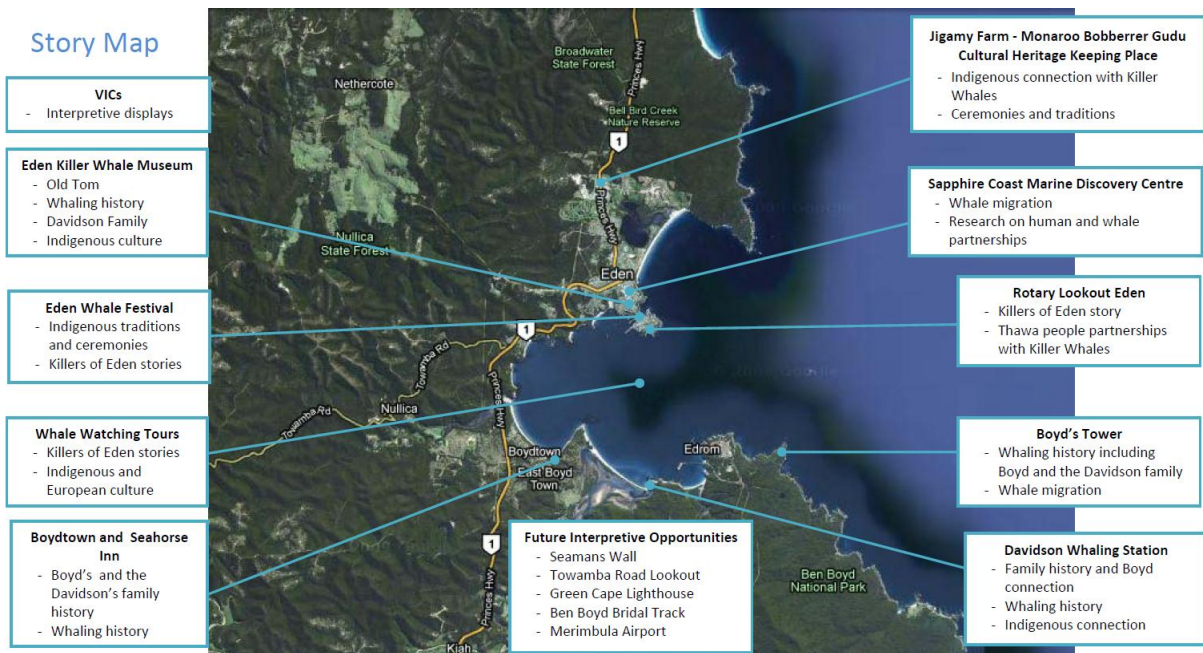
The Killers of Eden is a story that has significant potential to attract and entertain the international “Experience Seeker”. The stories behind the Killer Whales incorporate both Indigenous and European culture and link directly to some of the region’s most popular tourism ventures. Many people whose families were involved in the story still live in the area.

Indigenous Heritage

Collaboration between the local Thawa people and the Killer Whales is the oldest recorded human and wild animal hunting partnership. Indigenous oral history tells of a partnership where Killer Whales assisted the Indigenous people in hunting and killing baleen whales and the tribe provided payment of whale tongue to the Killer Whales for their help. It is said that the Thawa people had a long established co-operative relationship with the Killer Whales, whom they called "Beowas" and revered as reincarnated warriors reborn to the sea from the Dreaming.

European Heritage

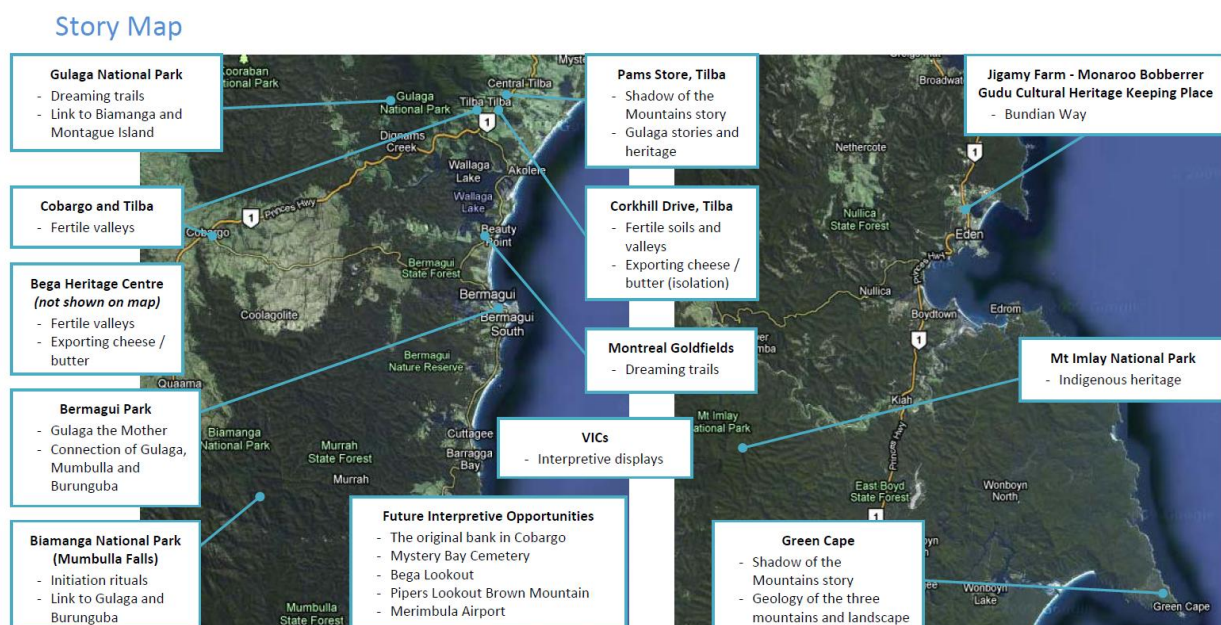
The Killers of Eden story continues with three generations of the Davidson family working with local Aboriginal people and the killer whales that herded other whales into the bay to be hunted. There are even stories of whaling boats being towed out to sea and around Twofold Bay by ‘Old Tom’, the region’s most famous Killer Whale.



ICONIC STORY 2: IN THE SHADOW OF THE MOUNTAINS

There is a local saying that, “if you sleep in the shadow of the mountains you are destined to return”. This story explores the magnetic attraction of the region’s geological, natural and cultural history, the fertile valleys, rugged coastline and the magnificent mountains that created them. With links to Indigenous and Europeans stories of the three mountains – Gulaga (Mt Dromedary), Mumbulla (Biamanga National Park) and Balawan (Mt Imlay) - the Shadow of the Mountains story is supported by a number of natural and cultural heritage attractions. These include:

- National Parks and Reserves, walking trails and other natural assets;
- Bega Cheese and local agricultural enterprises; and
- Various museums and heritage sites.

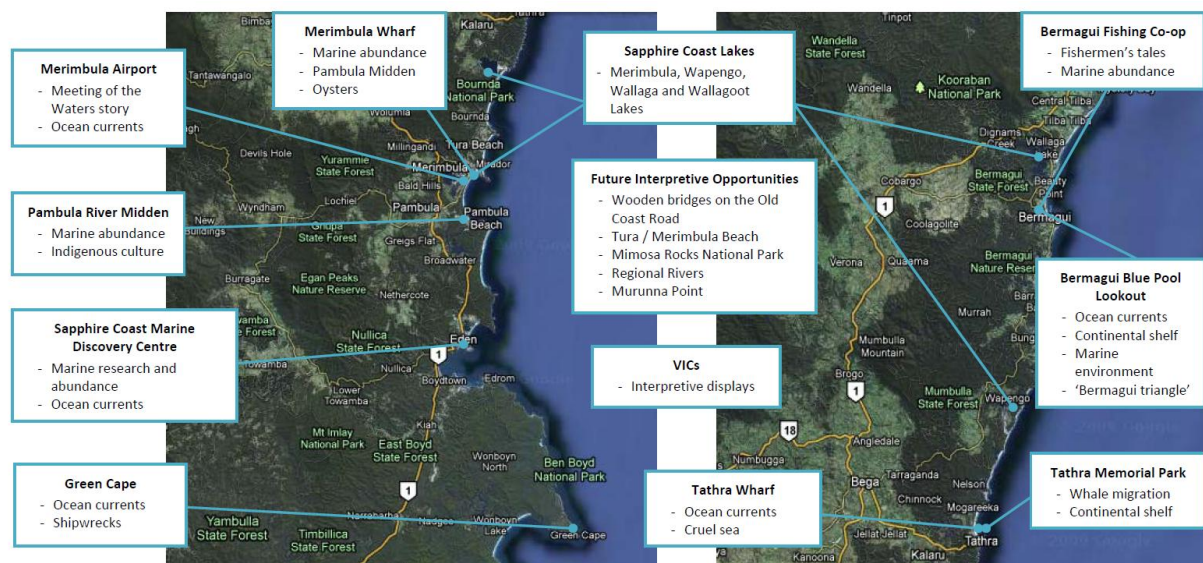


ICONIC STORY 3: MEETING OF THE WATERS

The Meeting of the Waters story links both the geological and cultural history of the region to its enterprises and attractions. The picturesque coastline, popular with holiday makers for generations, holds a secret just below the surface. The warm ocean currents from the Coral Sea meet the Antarctic waters flowing up from the Bass Strait. This unique combination explains why the region has the most abundant marine life outside the Great Barrier Reef and is a mecca for marine researchers the world over. However it has also left a number of unsolved mysteries.

This diverse marine ecosystem supports a wide range of business, activities and tourism opportunities for the region including:

- Scientific research into the geological and marine environments including climate change research and dedicated programs through the Sapphire Coast Marine Discovery Centre;
- Fishing and seafood industries;
- Marine education and built attractions;
- Whale watching tours and marine wildlife tours;
- Interpretation of marine stories including both Indigenous and European stories and history; and
- Coastal attractions including lookouts, walks and viewing points.



For each of the iconic stories a series of tasks is set out for the promotion and communication of heritage tourism experiences designed to reach the target market, and promote the experiences related to these iconic stories. The strategy also sets out an action plan to develop and deliver each of the stories, allocating time lines and responsibilities.

The strategy was delivered well within budget. The supervisory group decided to supplement the three iconic stories with two more experience packages to expand the strategy and provide stronger links with Indigenous and cultural tourism. The additional stories included implementation actions.

ICONIC STORY 4: THE BUNDIAN WAY

The Bundian Way is an ancient trading route and pathway that runs 260km from the highest part of the continent, the Australian Alps, to the coast at Twofold Bay in Eden. Thought to be over 40,000 years old, the Bundian Way and the network of ancient pathways of the region are thought to predate the Silk Road, the Roman roads and other ancient trade routes.

The Bundian Way takes in many individual sites including ceremonial places, stone arrangements, marked trees, whale places, moth gathering places and provides connections between them. The pathways were used by Aboriginal tribes for trading of food and goods, to attend the whaling and springtime ceremonies in Twofold Bay (Turemulerrer), go moth hunting in the high country at Mount Kosciuszko (Targangil) in summer and visit other ceremonial places.



Naturally Inspired

The Sapphire Coast is a destination known locally for its creative culture; a culture that has been inspired by nature. The concept of *Naturally Inspired* seeks to embrace the region's creative energy and to engage visitors to become inspired by the region's unique natural environment.

The story is about a community that is naturally inspired and encourages its visitors to get involved. The vision is that it not be known only as a creative destination, but one that actively engages visitors in a creative lifestyle that is authentic to the community, in a way that few tourism destinations do. The aspiration is to be a welcoming community that encourages and enables its visitors to be naturally inspired and to find a way to express that inspiration. The aim is to attract visitors who have an interest in nature, culture and arts and provide experiences that encourage creativity through their holidays. The strategy sets out the range of festivals and events, art galleries and studios, markets, natural attractions, Indigenous culture and arts, and complementary visitor services experiences (food and wine and accommodation).



Bermagui's *Sculpture on the Edge* with Gulaga (Mt Dromedary) in the distance – one of the iconic mountains.

SAPPHIRE COAST HERITAGE TOURISM STRATEGY- NEXT STAGE

The implementation of the strategy action plans is undertaken through the resources of the constituent organisations comprising the supervisory group. In addition, further grant funding has been sought to:

- Produce high quality authentic information suitable for posting on the Australia's Coastal Wilderness and Sapphire Coast Tourism websites. The information, including maps diagrams and photographs will be produced in a form suitable for ready adaptation for use in Visitor Information Centres, site-specific interpretation, tourism brochures, regional directional signage, media stories and personal communication devices.
- Provide on-site interpretative signage.
- Provide web based social media mechanisms for the collection, sharing (with visitors and the community) and updating heritage information related to the Heritage Strategy.
- Provide tourism signage to direct visitors to sites.

CONCLUDING REMARKS

There are good examples where government initiatives have developed a policy framework for heritage tourism. The challenges arise in translating good intentions into implementation. It is one thing for a heritage and/or a tourism agency to provide the settings for heritage tourism but it is quite another thing to see them delivered to the visitor on the ground.

The barriers to successful delivery can be many and complex, for example:

- Traditional regional tourism organisational structures committed to furthering existing (and in many cases declining) tourism markets.

- Traditional regional tourism organisational structures dominated by accommodation providers focused on promotion campaigns with little additional capacity to focus on the strategic development of new experiences and new markets.
- Traditional regional tourism organisations continuing to commit a large proportion of their very limited budgets to the establishment and operation of Visitor Information Centres in the face of significant changes in the way potential visitors use the internet to research, select and book travel decisions.
- Long standing intra- and inter-regional rivalries which stymie progress towards the cooperative development of strategic tourism.
- Fragmentation in the tourism industry dominated by (often struggling) small businesses ill-disposed to regional scale cooperative strategic product development and promotion, and intrinsically antagonistic to local, state or national government participation in their industry.
- The political, social and economic structure of regional areas focused on retaining the worth of (often declining) traditional resource based industries with little consequent understanding of emerging industries, including the need to service potential tourism markets.
- An overdependence on volunteer inputs to provide the intellectual and physical resources to develop tourism strategies vital for the future economic well being of an area.
- An overdependence on 'vital personalities' (regional success stories across a whole range of community endeavours depend on the involvement of vital personalities, which, if they leave the area, can be the death knell for progress and implementation).
- Some state tourism organisations dedicated to the promotion of state geography as a tourism experience, contrary to the most elemental concepts of branding and marketing.
- Some managers in heritage and conservation agencies not having the commitment or the skills to engage as vital partners in the development of regional tourism.
- Very limited financial resources to provide the professional planning and delivery of heritage tourism strategies.

Progress cannot be made in the absence of a strongly motivated and closely coordinated regional commitment.

The most appropriate role for government is to facilitate the progress of regions willing to take the vital step in working together for a common good. Government actions might include:

- Development of over-arching heritage tourism strategies such as the Western Australian example.
- Funding catalytic initiatives such as destination branding and experience development planning.
- Tourism grants programs such as TQAL.

- Targeted regional development grant programs where infrastructure investment would make a big contribution to tourism success.
- Targeted heritage grant programs.
- Using potential tourism *market winners* as a basis for prioritising allocation of resources in heritage and national parks agencies (for example World Heritage and National Heritage places and National Landscapes).
- Targeting Indigenous development and skills training programs to heritage tourism initiatives where such potential has been identified through regional tourism strategic planning.
- Continuing support for key market research programs to inform strategic planning.

There is one vital factor most often missing in the complex entanglement that is regional tourism: the wants and needs of the visitor. The potential social and economic rewards for a region willing to step over the problem heap and deliver uniquely compelling heritage tourism experiences to a discerning market could be very handsome indeed. There is not much competition.

The final comment relates to the role of government. Different levels of government are custodians of different heritage lists with the potential to confuse rather than focus the potential visitor. It is incumbent on heritage agencies to provide leadership in the development of heritage tourism. If they don't who does? The Western Australian case study is a good example of a state level partnership providing the framework for regional strategies to pick up. At a national level the recent serial listing of Convict World Heritage Sites has resulted in the national and state governments committing themselves to a joint approach to the development of heritage tourism opportunities that will flow from the listing.

The Sapphire Coast Heritage Tourism Strategy is an example of a regional community drawing on the leadership provided by the national government in identifying Australia's outstanding national tourism experiences. At the end of the day the experiences have to be delivered to the visitor on the ground. If that delivery fails then all the strategies in the world will be a waste of time and money.