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Identifying visitor preferences for alternative experiences to summiting Wollumbin (Mt Warning): executive summary of reports 1-3

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Identifying Visitor Preferences for Alternative Experiences to Summiting Wollumbin (Mt Warning)

EXECUTIVE SUMMARY OF REPORTS 1-3

By: Pascal Scherrer, Brent Moyle, Erica Wilson, Betty Weiler, Noah Nielsen, Rod Caldicott & Monica Torland

Prepared for: New South Wales National Parks and Wildlife Service

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Front cover photograph:
Looking north towards Wollumbin (Mt Warning) with the Border Ranges National Park rising on the left. Northern Rivers region, NSW. Hamilton Lund; Destination New South Wales.

1 The Northern Rivers is sometimes referred to as North Coast and Far North Coast. Each is used in this document relative to its historical context.
Identifying Visitor Preferences for Alternative Experiences to Summing Wollumbin (Mt Warning)

INTRODUCTION

The World Heritage listed Wollumbin National Park, located in the north-east corner of New South Wales (NSW), is a capstone asset within the national conservation estate. As a pinnacle feature and tourist attraction of the Northern Rivers region, the park is a renowned nature-based attraction of national and international significance. At the core of the park is Wollumbin, an extinct volcanic plug that forms a distinct and widely visible landmark. While referred to by its Aboriginal name throughout this document, the dual named mountain is popularly known also as Mt Warning.

Wollumbin, particularly the mountain summit, is considered a sacred site of spiritual and cultural significance to Indigenous tribes of the region and the activity of summing Wollumbin is contrary to Indigenous spiritual tradition. Nonetheless, the ascent of Wollumbin along the so called summit track is one of the region’s key visitor attractions. The ascent is nationally and internationally promoted as a ‘bucket list’ item through outlets such as Australian Geographic and Lonely Planet Guides and each year an estimated 100,000 visitors attempt to climb Wollumbin via the summit track. This presents a raft of challenges for the sustainable management of the site.

In late January 2013, the Wollumbin summit track was closed following a major storm event. The dramatic downturn in visitor related business to the local area following the closure of this focal attraction further highlighted a need and opportunity to diversify nature-based visitor experiences in this area by offering alternative visitor experiences. While the track was reopened in November 2013, physical, environmental, cultural and financial restrictions to managing the site continue to point to the need for a diversification of local visitor experiences and a strategy to disperse visitors and reduce visitor pressure on the Wollumbin summit track.

Thus the focus of the project “Identifying Visitor Preferences for Alternative Experiences to Summing Wollumbin (Mt Warning)” was on identifying and testing activities and scenarios of visitor experiences in the region as potential alternatives to the experience of summing Wollumbin. The project contributes to the identification of suitable alternative visitor experiences to help disperse visitors and reduce visitor pressure on the Wollumbin summit track. The project was commissioned in 2013 and was funded by the NSW National Parks and Wildlife Service (NPWS) with substantial in-kind support from Southern Cross University (SCU) and was conducted by a team of researchers from SCU.

This document is the Executive Summary to a series of three reports that together make up the Final Report for the research project entitled “Identifying Visitor Preferences for Alternative Experiences to Summing Wollumbin (Mt Warning)”.

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RESEARCH AIMS

The overall aim of the research was to identify visitor preferences for alternative experiences to summiting Wollumbin (Mt Warning) in north-east NSW.

A number of sub-aims guided the direction of this project, namely:
1. To identify the broader context of tourism and recreation planning and management relating to visitation of Wollumbin;
2. To explore stakeholders’ views on visitor management at, and the climbing of, Wollumbin;
3. To identify stakeholders’ ideas on and support for alternative experiences in and surrounding Wollumbin;
4. To develop a range of potential alternative scenarios to summiting Wollumbin; and
5. To assess potential visitors’ preferences for these alternative experiences.

RESEARCH APPROACH

To achieve the research aims and identify and examine potential alternatives to summiting Wollumbin, three main methods of data collection were employed: 1) A desktop review; 2) Stakeholder interviews; and 3) A survey of potential visitors.

Desktop Review (see Report No. 1)
A desktop review was conducted of existing planning and strategy documents relating to visitor use and experiences in the Northern Rivers region and specifically Wollumbin (1994-2014). Recognising that the scarcity of nature based visitor experiences in the region has been subject to substantial prior discussions and part of regional strategic and planning processes, this project sought to build upon and extend previous work.

Stakeholder Interviews (see Report No. 2)
Semi-structured interviews with 22 key stakeholders identified and selected by the NSW NPWS were conducted during October and November 2013 to explore a variety of perspectives regarding visitor use of Wollumbin and to identify a range of potential alternative experiences to summiting Wollumbin. These stakeholders were largely at the representative level and included participants from different levels within the NPWS and the NSW Office of Environment and Heritage (OEH), as well as regional and local representatives from relevant environmental, tourism and Indigenous associations within the Wollumbin region. A recognised limitation of this research is the absence of individual business stakeholders as well as potential investors. Interviews were recorded and transcribed verbatim. Transcripts were then coded using thematic analysis and commonalities and core themes were elicited.

Survey (see Report No. 3)
The desktop review, interviews and consultation with key stakeholders in NPWS informed the development of a survey based on a range of visitor experiences and a series of eight alternative scenarios to the experience of summiting Wollumbin. The online survey with potential visitors to the region sought to capture preferences for, and elicit the likelihood of selecting, alternative scenarios. The survey was distributed using the services of a panel provider (Survey Sampling International) and applied a systematic stratified sampling approach, selecting participants based on age, gender and region. The regional stratification was deemed particularly relevant for this research, with 50% of respondents sourced from two key markets for Wollumbin, northeast NSW and southeast Queensland (Qld), 30% from Brisbane and Sydney; and 20% from wider Australia. Out of 1341 commenced surveys, a total of 991 were completed and valid surveys suitable for subsequent data analysis.
HOW TO USE THE FINAL REPORTS

The purpose of this Executive Summary is to provide a brief overview of the key findings reported in the three reports that together make up the Final Report for the research project “Identifying Visitor Preferences for Alternative Experiences to Summiting Wollumbin (Mt Warning)”. While each of the individual reports presents a different set of information, they are seen as complementary and should be considered together in future management and planning decisions. Specifically, Report 1 highlights the broader contextual considerations and extensive planning history relating to tourism and recreation management in the region. It can be used as a resource document that brings together the multitude of existing planning and management documents and processes. Report 2 presents a range of stakeholder perspectives and identifies key themes relating to the management of the ‘Wollumbin summit experience’ and potential alternative experiences. It does not represent the views of all stakeholders in the region but captures a sample of NPWS/OEH, Tourism, Indigenous and Other Community representatives. Through the presentation of direct quotes from the interviews, it enables the reader to explore detailed insights against the key themes identified. Report 3 presents the detailed survey data on visitor activities and experience scenarios. It provides a baseline understanding of the preferences of potential visitors. As such it can inform future planning and management decisions and can be further explored according to specific considerations such as target market characteristics or the level and type of infrastructure to be provided. It does not, however, provide a detailed understanding of current visitors3 nor does it endorse one activity or experience scenario over any other.

KEY FINDINGS - DESKTOP REVIEW (REPORT 1)

Wollumbin’s prominent visibility and distinct physical presence as the ‘heart’ of the Northern Rivers biosphere have contributed to the mountain’s symbolic status. Wollumbin has a unique set of evolutional, geological, cultural, mythical, spiritual, environmental, historical and social attributes, and thus is often used to promote the quintessential essence of the Northern Rivers brand. Not surprisingly though, people do not all share the same values, which inadvertently puts pressure on Wollumbin, particularly in a recreational context.

The genesis of nature-based tourism and recreation planning for the broader Northern Rivers region was in the NSW Far North Coast Nature-based Eco-tourism Plan (1995). This seminal work provides the foundations and presents the guiding principles, at a regional level, for ecological sustainability supporting the ensuing raft of planning instruments. Notably, among those are The Rainforest Way (2000), Bundjalung Cultural Tours (2003), Australia’s Green Cauldron (2008 & 2012) and North Coast Destination Management Plan (2013). In many respects, elements of the successive plans have built upon, or sought to deliver on, recommendations from the Nature-based Eco-tourism Plan.

At a sub-regional level, Tweed Caldera (NSW) specific initiatives have included a pre-feasibility study for An Environmental Interpretive Centre for the Tweed (2008) and the Caldera Sustainable Communities Project Community Discussion Paper (2011). Both documents have sought to highlight the depth of local community engagement required to establish world class amenities and experiences for both local and visitor enjoyment.

At the centre of local natural-area planning are the Wollumbin National Park (NSW) specific initiatives contained within the Parks and Reserves of the Tweed Caldera Plan of Management (2004). The parks and reserves of this planning area are all considered in the one plan because, with the exception of the western Border Ranges, they form part of a common landscape, the Mt Warning shield volcano (also forming part of this spectacular landform are

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3 Note that a Southern Cross University student project by Madeline Hill in April 2014 collected and analysed 804 on-site visitor surveys at Wollumbin to explore visitor motivations, profiles and perceptions of cultural values. The report based on this survey and entitled “An Examination of Visitor Profile, Motivations and Perceptions of Cultural Issues Associated with Summiting Wollumbin (Mt Warning)” supplements our research by shedding light on actual visitors. A follow-up on-line survey of some of these visitors further assessed their preferences for alternative experiences. A summary of responses will be made available in due course.
Lamington and Springbrook National Parks in Queensland. Most of the planning area is internationally renowned for its World Heritage listed subtropical rainforests (part of the Gondwana Rainforests of Australia World Heritage property), outstanding landscapes, and the recreation opportunities it affords. The plan also provides for the protection of significant Aboriginal and historic cultural heritage values.

Some key challenges to the progression of a number of the initiatives and recommendations in past reports are associated with the way tourism activities are managed across the Northern Rivers region. These factors include, though are not limited to, the diversity of land tenures, separated agency responsibilities, as well as independent local governments, marketing associations, and communities demonstrated to be insufficiently engaged with one another to facilitate sustainable tourism development. Nonetheless, sustainable nature based tourism development can be overcome by intra-regional and multi-agency collaborations such as demonstrated in the case of the Rainforest Way project. The case of the Rainforest Way highlights the importance of leadership, project management, dedication and negotiation to deliver tangible benefits and keep stakeholders at all levels sustainably engaged.

In addition to regional, subregional and local context considerations, there are important state and national level influences to consider such as those arising from the Visitor Economy Taskforce Report on doubling visitor expenditure by 2020 and the marketing focus on the Experience Seekers segment by Tourism Australia, respectively.

**KEY FINDINGS - STAKEHOLDER INTERVIEWS (REPORT 2)**

The stakeholder interview analysis uncovered five core themes with consideration for the development and implementation of alternative experiences to summiting Wollumbin. These themes were: 1) The Wollumbin Experience; 2) Cultural and Other Management Issues; 3) Stakeholder Identified Alternatives; 4) Attitudes towards Specific Alternatives; and 5) Challenges in Developing Alternatives. A number of subthemes provided more detail on each of these core areas, and are shown below.

1) **The Wollumbin Experience**
   - Connection to Wollumbin
   - An iconic visitor experience
   - Walking on Wollumbin

2) **Cultural and Other Management Issues**
   - Please don’t climb: Indigenous cultural issues
   - Visitor management issues
   - Environmental management issues

3) **Stakeholder Identified Alternatives**
   - Need for alternatives
   - Rainforest walking alternatives
   - Cultural alternatives
   - Landscape and viewing alternatives
   - Modifying and extending experiences outside the park

4) **Assessing Attitudes to Specific Alternatives**
   - Indigenous tours
   - Visitor centre
   - Ziplines
   - Ecolodge

5) **Challenges in Developing Alternatives**
   - Under-developed tourism industry
   - Lack of funding and other resources
   - Need for greater collaboration
   - Need for Community support
The Wollumbin Experience
All stakeholders spoke of a close connection to Wollumbin. This ranged from Indigenous custodians who felt spiritually connected to Wollumbin, to those who had a childhood connection to the mountain. Wollumbin was a key, oft-sighted feature within their regional landscape, within their everyday lives, and within the life of the community. The importance of Wollumbin’s geological, tourism and landscape values was also made evident and the mountain itself was widely regarded as an iconic visitor experience. Walking on Wollumbin was seen as the key visitor experience in the National Park, if not within the entire region. A widely held perception was that most visitors come to Wollumbin National Park to climb the mountain. These visitors were perceived to be less appreciative of the mountain’s natural and cultural values. A number of interviewees had not climbed the mountain due to the cultural request, and choose to appreciate it from a distance instead.

Cultural and Other Management Issues
All stakeholders spoke of the cultural significance of Wollumbin to the local Indigenous community/ies, and cited some Indigenous people’s request that they ‘please don’t climb’. Key visitor management issues related to a lack of visitor data and market research regarding Wollumbin National Park, and the climb itself. There was an identified need for strong communication among NPWS, potential visitors and the tourism network. This was specifically discussed in terms of track closures and perceived ‘mixed messages’ around the Indigenous request not to climb. There was also concern about environmental management issues due to visitation, or perceived increasing visitation.

Stakeholder-Identified Alternatives
Stakeholder interviewees put forward several ideas about potential alternative experiences to summiting Wollumbin. Some felt simply that there is no alternative to climbing Wollumbin. When posed with the question of alternatives, however, stakeholders discussed a range of options focused on other rainforest walking and viewing alternatives. A number of cultural alternative experiences and opportunities were further identified. All of these were seen to require good Indigenous interpretation and engagement. Many stakeholders felt that looking to landscape alternatives – or alternatives that still focussed on Wollumbin and the caldera - could provide alternative experiences for a significant segment of the visitor market. In discussing alternatives to climbing, stakeholders further discussed modifying current experiences.

Assessing Attitudes towards Specific Alternatives
Four particular tourism experiences (Indigenous tours, a visitor/cultural centre, ziplines and ecolodges) that have been previously canvassed in the region were put to stakeholders during interviews. Interviewees offered overwhelming support for Indigenous tours being offered in or around Wollumbin, as determined appropriate by the local Indigenous community/ies. There was some noted interest in a cultural centre. There was also support for the idea of a World Heritage visitor centre on the top of Mt Nullum, with a focus on integrated visitor education and interpretation, as well as bushwalking and adventure tourism (rock climbing, etc.) possibilities. A zipline project had been proposed in the caldera in the 1990s and discussed in the region since. However, stakeholders were concerned about the viability of zipline/adventure projects and whether there was adequate market demand. Many were supportive of an ecolodge idea and other off-park accommodation facilities in the Wollumbin region. Similar to all the other proposals, stakeholders saw cultural, community and environmental issues as critical to whether they would be supported.

Challenges in Developing Alternatives
Stakeholders frequently commented on the under-developed nature of the tourism industry as a challenge in developing new visitor alternatives in the Wollumbin region. Finding resources was seen as essential for the development of sustainable alternative experiences. The need for greater collaboration among stakeholders and key agencies was seen as a further challenge. There was also a need for better collaboration among local government areas, tourism operators and NPWS for the provision of sustainable visitor activities and experiences. Finally, community support – both local and Indigenous - was viewed as essential for any alternative visitor activities to be developed. Stakeholders were also sensitive to the potential environmental impacts of development within Parks.
KEY FINDINGS - SURVEY (REPORT 3)

The survey of potential visitors provides insights into their preferences for the range of 19 nature based tourism activities as highlighted by the mean ratings and frequency distributions presented in the table below. It highlights that passive/low intensity experiences appear to have a broader appeal than active/high intensity experiences.

Likelihood of participating in the suggested nature based tourism activities: frequencies & means (n = 991)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Frequency Distribution</th>
<th>Mean Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Going for a walk along the beach</td>
<td></td>
<td>3.9</td>
</tr>
<tr>
<td>Viewing the landscape from lookouts</td>
<td></td>
<td>3.9</td>
</tr>
<tr>
<td>Having a picnic or barbeque</td>
<td></td>
<td>3.8</td>
</tr>
<tr>
<td>Visiting a place to view wildlife</td>
<td></td>
<td>3.7</td>
</tr>
<tr>
<td>Visiting a cafe in a natural setting</td>
<td></td>
<td>3.7</td>
</tr>
<tr>
<td>Visiting a viewing tower with extensive landscape views</td>
<td></td>
<td>3.7</td>
</tr>
<tr>
<td>Going for a swim at the beach</td>
<td></td>
<td>3.5</td>
</tr>
<tr>
<td>Visiting a treetop/canopy walk</td>
<td></td>
<td>3.3</td>
</tr>
<tr>
<td>Visiting a place to swim in a waterhole</td>
<td></td>
<td>3.3</td>
</tr>
<tr>
<td>Visiting a place for nature photography</td>
<td></td>
<td>3.2</td>
</tr>
<tr>
<td>Taking an aerial cable car journey</td>
<td></td>
<td>3.2</td>
</tr>
<tr>
<td>Experiences based at or provided by your tourist accom.</td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Visiting a cultural/interpretive centre</td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Participating in a guided tour</td>
<td></td>
<td>2.9</td>
</tr>
<tr>
<td>Completing a ‘most’ experience</td>
<td></td>
<td>2.8</td>
</tr>
<tr>
<td>Riding a zipline/flying fox</td>
<td></td>
<td>2.7</td>
</tr>
<tr>
<td>Reaching the summit of a mountain</td>
<td></td>
<td>2.7</td>
</tr>
<tr>
<td>Experiencing the landscape from the air</td>
<td></td>
<td>2.6</td>
</tr>
<tr>
<td>Riding a mountain bike on tracks or trails</td>
<td></td>
<td>2.2</td>
</tr>
</tbody>
</table>

*1=not at all likely; 5=extremely likely

The comparative preferences by potential visitors for a range of scenarios alternative to that of summiting Wollumbin is presented in the table below. It highlights that Scenario 3 (Waterfall, picnic, views & walks) is consistently the preferred scenario across all measuring techniques applied. Further, it demonstrates that all of the tested alternative scenarios have a broader appeal to potential visitors than the current experience of summiting Wollumbin; and that the modification scenario (ascent to viewing platform below summit) ranks second lowest only to the summiting scenario. Notably, respondents who have visited Wollumbin before also preferred the alternative scenarios over summiting Wollumbin.

Summary comparison of scenario rankings* across the different measuring techniques applied in the survey

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Proposed Location</th>
<th>Comparative Rank of Scenarios</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - Summiting Wollumbin</td>
<td>Wollumbin</td>
<td>N/A N/A 9 8</td>
</tr>
<tr>
<td>2 - Cliff walk &amp; views</td>
<td>Blackbutt, Border Ranges NP</td>
<td>4 4 4 3</td>
</tr>
<tr>
<td>3 - Waterfall, picnic, views &amp; walks</td>
<td>Minyon Falls, Nightcap NP</td>
<td>1 1 1 1</td>
</tr>
<tr>
<td>4 - Scenic drive</td>
<td>Rainforest Way, Border Ranges</td>
<td>5 2 5 4</td>
</tr>
<tr>
<td>5 - Culture &amp; adventure precinct</td>
<td>Mt Nullum</td>
<td>6 6 6 5</td>
</tr>
<tr>
<td>6 - Treetop walk</td>
<td>Various</td>
<td>3 3 3 2</td>
</tr>
<tr>
<td>7 - Section of multi-day walk</td>
<td>Nightcap &amp; Mt Jerusalem NP</td>
<td>7 7 7 7</td>
</tr>
<tr>
<td>8 - Rainforest loop-walk</td>
<td>Wollumbin - Extended Lyrebird walk</td>
<td>2 5 3 6</td>
</tr>
<tr>
<td>9 - Wollumbin ascent to viewing platform</td>
<td>Wollumbin</td>
<td>8 8 8 9</td>
</tr>
</tbody>
</table>

*1=most preferred, 9=least preferred
Examination of some within-scenario variations further revealed that road surface does matter - there is a strong and significant decline in 'likelihood to select' scenarios containing sections of unsealed road; and that potential visitors appear to be price sensitive as evident by negative effects of scenario variations that included a cost to the consumer.

The survey data highlights that there is no one-shoe-fits-all approach to take pressure off the summit of Wollumbin or indeed successfully diversify nature based tourism experiences in northern NSW. Diversification of nature based experiences could attract new visitors into parks as well as take pressure off the summit. Consideration should be given to creating a multi-experience site or multiple sites catering to differing needs. These may include passive and active experiences that appeal to different genders, ages, and more importantly people with different levels of experience in parks. It must also be emphasised that the motivation and preferences of actual visitors to the site was not within the scope of this study but is an important consideration in efforts to reduce visitor use of the Wollumbin summit track.

Report 3 provides baseline data about potential visitors as stratified by age, gender and region. It contributes to informing planning, management and investment decisions regarding the development of alternative visitor experiences to that of summiting Wollumbin. For instance, if the focus is on targeting frequent National Park users, or a certain age group, then this research provides a foundation to inform management decisions that could build an alternative experience to attract such visitors. However, such decisions will be further influenced by specific policy objectives, resourcing, key target markets and leadership to facilitate stakeholder support and drive implementation. Report 1 (the desktop review) and Report 2 (stakeholder interviews) draw attention to some of these issues and highlight that the diversification of nature based tourism experiences in the region is a desired yet contentious issue. As such they provide important broader context to the consideration of the survey data presented in Report 3 and the planning and implementation of any future developments.

**OBSERVATIONS, CONSIDERATIONS AND CONCLUSIONS**

The context of managing the region as a tourist destination is complex and multifaceted. Stakeholder views are in some instances conflicting and elements of repetition (in contrast to implementation or resolution) are apparent in strategic planning and management processes over the past two decades. These factors have direct implications on management of the Wollumbin summit track and consideration should be given to the following sub-contexts:

**Regional:** The summit walk is a primary attraction of the region and is promoted at many levels; current dependency of local businesses on single attraction; conservation (not visitor) focussed parks supporters in region; no current alternatives for visitors; Wollumbin is part of a broader cultural landscape;

**International:** Wollumbin has World Heritage status and the ascent is internationally promoted as a ‘bucket list’ item;

**Indigenous:** Climbing the mountain may not be a culturally appropriate visitor activity, particularly the top of the mountain; Wollumbin is an important component of the Aboriginal cultural landscape;

**Administrative:** The area is under NPWS tenure. There is no native title claim or determination;

**Political:** Visitor Economy Taskforce Report on doubling visitor expenditure by 2020; Experience Seekers focus by Tourism Australia; increasing recognition and moral considerations of cultural sensitivities of site by local tourism and agency representatives.

These contexts are also apparent in key themes arising from the desktop review and interview analysis:

- the standard and diversity of visitor experiences in the region need to be improved to match its values and assets as an iconic and World Heritage recognised international destination;
• the region is a cultural landscape in which many of the peaks may have significant cultural values. This has potential ramifications for considering alternative experiences, particularly if pursuing a ‘substitution’ strategy. Engagement with and support from Indigenous communities is imperative to cultural sustainability of activity;
• any decisions about the nature, context and approach regarding the development of Aboriginal cultural experiences need to be determined and driven by Aboriginal stakeholders/custodians;
• concerted ‘conversations’ with all parties to determine and agree upon clear and consistent messages to visitors and tourism representatives about the cultural appropriateness of summit access will be beneficial for tourists and for tourism to the area;
• community support for any tourism/visitor related development is an important consideration to ensure the success and sustainability of any venture given the reportedly conservation-focussed development-shy constituency;
• there is a need for collaboration and leadership to progress proposals and strategies beyond the exploration and planning phase and champion implementation.

It is important to recognise that the current ‘visitor site’ at Wollumbin has significant physical, environmental and cultural constraints which are well recognised at the local level. This recognition, nonetheless, is less evident beyond the local level as highlighted by continuing elements of promotion of the specific site rather than the cultural landscape in the regional, national and even international realm. Against this context, it is important to highlight that the notion of no action is not a sustainable visitor management position and that the facilitation and promotion of alternative experiences as well as targeted measures focussed on current visitors should be explored.