GATEWAY VISITOR CENTRE

Draft Master Plan

Mon Repos

Department of National Parks, Recreation, Sport & Racing

17 December 2013
# TABLE OF CONTENTS

## EXECUTIVE SUMMARY

1. INTRODUCTION ....................................................................................................................................... 6
   1.1. Project Background ......................................................................................................................... 6
   1.2. Concept Master Plan Report ........................................................................................................... 6
2. STUDY APPROACH ................................................................................................................................... 7
   2.1. The Brief .......................................................................................................................................... 7
   2.1.1. Centre of Excellence for Turtle Conservation and Research and Interpretation ....................... 7
   2.1.3. Commercial Ecotourism Investment Opportunities .................................................................. 7
   2.2. Guiding Principles ............................................................................................................................ 8
   2.3. Overview of Project Plan ................................................................................................................ 8
   2.4. Stakeholder Engagement ................................................................................................................ 8
3. STRATEGIC POLICY REVIEW .............................................................................................................. 9
   3.1. Overarching Strategic Direction .................................................................................................... 9
   3.2. Regional Tourism Objectives ....................................................................................................... 9
   3.3. State and National Marine Turtle Conservation .......................................................................... 10
4. CONTEXT & SITE ANALYSIS .............................................................................................................. 12
   4.1. Tenure and Land Use ...................................................................................................................... 12
   4.2. Planning Scheme for Burnett Shire ............................................................................................... 13
   4.2.1. New Planning Scheme .............................................................................................................. 13
   4.3. Barolin Nature Reserve .................................................................................................................. 13
   4.4. Turtle Trail ..................................................................................................................................... 13
   4.5. Non-Indigenous Heritage Features ............................................................................................... 14
   4.6. Indigenous Cultural Heritage ....................................................................................................... 15
   4.7. Waterways and wetlands .............................................................................................................. 15
   4.8. Protected Areas .............................................................................................................................. 16
   4.9. Ecology .......................................................................................................................................... 16
   4.10. Coastal Issues ................................................................................................................................. 18
   4.11. Site and Visitor Centre Analysis ................................................................................................... 20
   4.11.1. Site Analysis ........................................................................................................................... 20
5. MARINE TURTLES ............................................................................................................................... 25
   5.1. Overview ........................................................................................................................................ 25
   5.2. Marine Turtle Research at Mon Repos .......................................................................................... 25
   5.3. Conservation Priorities at Mon Repos ........................................................................................... 25
6. MARKET ANALYSIS ............................................................................................................................ 27
   6.1. Introduction ................................................................................................................................... 27
   6.2. Experience Audit ........................................................................................................................... 27
   6.2.1. Visitor Profile ............................................................................................................................ 27
   6.2.2. Visitor Numbers ......................................................................................................................... 27
   6.2.3. Visitor Experience ....................................................................................................................... 27
   6.2.4. Turtle Research and Conservation ............................................................................................ 29
   6.2.5. Community Experience ........................................................................................................... 29
   6.2.6. Turtle Conservation Volunteers ............................................................................................... 29
   6.2.7. Education and Interpretation .................................................................................................... 29
   6.2.8. Interpretive Displays ................................................................................................................ 30
   6.3. Market Assessment ....................................................................................................................... 30
   6.3.1. Domestic Drive Tourism ........................................................................................................... 30
   6.3.2. International Drive Tourism .................................................................................................... 31
   6.3.3. Voluntourism ........................................................................................................................... 31
   6.3.4. Wildlife Enthusiasts .................................................................................................................. 31
   6.4. Competitor Assessment ................................................................................................................ 32
   6.4.1. Product Competition ................................................................................................................ 32
   6.5. Market Attractiveness ................................................................................................................... 33
   6.6. Target Products and Markets ........................................................................................................ 33
   6.6.1. Connectors (Domestic) ............................................................................................................ 34
   6.6.2. Active Explorers (Domestic) .................................................................................................... 34
   6.6.3. Experience Seekers (International) ......................................................................................... 34
7. INTERPRETATIVE EXPERIENCE AUDIT .......................................................................................... 35
   7.1. Introduction ................................................................................................................................... 35
   7.2. Master and Sub-themes for Interpretation .................................................................................... 37
   7.2.1. Master Theme for Mon Repos ................................................................................................. 38
   7.2.2. Sub-themes for Mon Repos ...................................................................................................... 38
   7.2.3. Next Steps ................................................................................................................................ 38
8. EXISTING BUSINESS ANALYSIS

8.1. Need for new Business Models

8.2. Overview and Assessment of Current Business Models

8.3. Mon Repos - Current Business Model Analysis

8.3.1. Customer segments

8.3.2. Value Proposition (VP)

8.3.3. Channels & Customer Relationships

8.3.4. Revenue Streams & Cost Structures

8.3.5. Key Resources

8.3.6. Key Partnerships

8.4. Benchmark Analysis to Identify Future Critical Success Factors

8.5. Current Business Model – Key Observations

9. COMPETITIVE POSITION AND BRAND

9.1. Introduction

9.2. Destination Brand Positioning

9.3. Bundaberg North Burnett Hero Experiences

9.4. Mon Repos Brand Positioning

9.4.1. Brand Elements

9.4.2. Brand Positioning

9.4.3. Value Propositions

9.4.4. Essence Expanded

9.4.5. Brand Name

9.4.6. Brand Alignment

10. OPPORTUNITY SUMMARY

10.1. Overview

10.2. Business Model and Governance

10.3. Functionality of Visitor Centre

10.4. Year round experiences

10.5. Potential Future Staging

11. PROPOSED CONCEPT MASTER PLAN

11.1. Overview

11.2. Proposed Concept Master Plan

11.3. Elements of the Proposed Concept Master Plan

11.4. Concept Master Plan Figures
EXECUTIVE SUMMARY

The Master Planning Process for the Mon Repos Visitor Information Centre (Mon Repos) is an exciting opportunity being led by the Department of National Parks, Recreation, Sport and Racing (NPRSR) to consolidate the future of this site as an iconic encounter with nature and world class turtle conservation centre.

The vision and objectives for the site provided in the brief by NPRSR requested consideration of a range of potential future scenarios for the site including a centre of excellence for turtle conservation, research and interpretation; a world class ‘encounter with turtles’ experience and partnership ecotourism investment opportunities. All of these objectives were found to be consistent with current and projected visitor demand and the development of a viable business model.

Based on market trends, site constraints and a review of current operations, this analysis has identified that to support and consolidate the excellent work being undertaken by dedicated and passionate Rangers, researchers and volunteers at Mon Repos a re-imagining of the Visitor Centre is required to deliver the vision for the site. This will require new consideration and focus on the market offer, visitor facilities, research, governance model and interpretation resources.

The Long View Group consortium contractors and project Steering Committee have developed a Master Plan concept that (i) protects the integrity of the ‘encounter with turtles’ experience and the research and interpretation activities currently undertaken at the site (ii) provides a unique strategy for generating year round visitation and (iii) supports reinvestment of ecotourism and sponsorship revenue into the conservation of marine turtles.

The initial master plan will be taken to the wider community for full consultation and feedback with a view to developing and refining the future vision for the site. Creating a shared vision amongst key stakeholders and community will be crucial to the success of the Mon Repos Master Plan.

This concept Master Plan report outlines the proposed vision for creating a unique Gateway Hub for residents in the Bundaberg region and domestic and international visitors, which over time will consolidate the position of the Southern Great Barrier Reef as a tourism destination and generate revenue and activities that protect marine turtles across Queensland.

To create year round visitation to the site which is critical for supporting commercial investment in infrastructure, the concept Master Plan proposes the development of a year round hatchling nursery within the Visitor Centre with multiple conservation and ecotourism benefits. Re-locating the research facilities into the site will also reinforce and support the serious conservation agenda of Mon Repos and provide visitors with a compelling reason to visit the centre outside of the turtle nesting and hatching season.

Active involvement in turtle conservation at Mon Repos is essential. There are a number challenges facing visiting marine turtles. Protecting nesting and foraging habitat and reducing threats on their open ocean migratory journeys will help ensure the long term viability of the future population. A partnership approach is required and a key opportunity exists to establish a Turtle Foundation to support the work of the Visitor Centre into the future.

The proposed environmentally sensitive re-design and refurbishment of the existing Visitor Centre will resolve the all-weather challenges currently experienced by visitors to the site as well as issues associated with long wait hours to view the nesting and hatching turtles. The Visitor Centre will also provide improved resources for researchers studying turtles and some of this work can be shared with visitors to increase understanding of the threats facing these unique creatures through their long lifetimes.

The proposed concept Master Plan has the potential to attract commercial partners and provide multiple new and diverse revenue streams for the Visitor Centre to increase its financial sustainability. These opportunities may include tour packaging, operation of the café and eco-accommodation for researchers, volunteers and visitors. This would enable the site to reduce its reliance on State funding and reinvest in its long term future.

This Master Plan report outlines a proposed vision for creating a unique Gateway Visitor Centre for the region, re-branded as the Mon Repos Turtle Centre combining world’s best practice visitor experiences and turtle conservation.

A staging roadmap has been developed which outline tangible short term deliverables that can be funded within existing NPRSR budget. The longer term future vision for the site is subject to funding.
**FIRST STEPS**

Proposed initial first steps identified as being able to be delivered within existing available budget and aimed at improving the visitor experience in the short term, include:

- Implement new tourism products to generate revenue from the smaller more engaged group offering.
- Develop new movie and visual products for visitors waiting at the visitor centre for the turtle encounter.
- Implement the ‘gateway’ visitor centre offering and link to the Southern Great Barrier Reef.
- Identify and undertake staff resourcing and training to deliver the enhanced tourism product.
- Provide increased resources and training for staff to assist with delivery of the experience.
- Design and construct a new high quality landscaped entry feature, with integrated and illuminated signage, at the Mon Repos Road site access.
- Design and construct a tensile or insulated roof over the existing amphitheatre for increased visitor amenity. The new roof would need to incorporate side walls, fans and low level high pressure sodium lighting (delivery as part of First Steps is subject to detailed design and costing).
- Progress a new governance model for the site to achieve flexible ticketing arrangements and business-focussed management.

**LONGER TERM VISION**

For the longer term vision, the intention is to design and construct a newly expanded and contemporary visitor that could contain the following key elements: the year round turtle hatchling nursery, the relocated research facilities, the new interpretive centre, improved NPRSR staff facilities, the restaurant and dining area, retail and merchandising, and an upgraded car park. The longer term proposals are all subject to consultation and funding.
1. INTRODUCTION

1.1. Project Background

The Mon Repos Visitor Information Centre (Mon Repos) Master Plan project has arisen in response to the Queensland Government’s commitment to review and upgrade some of the State’s most popular Gateway visitor centres including Mon Repos in Bundaberg, David Fleays Wildlife Park on the Gold Coast and Walkabout Creek in Brisbane.

Mon Repos supports the largest concentration of nesting marine turtles on the eastern Australian mainland and is the most significant loggerhead turtle rookery in the South Pacific. Successful breeding is critical for the survival of this endangered species. Central to Mon Repos is the unique and iconic experience of the ‘encounter with turtles’ visitor experience and associated turtle conservation, research and education activities. The nesting and hatching period between October – April each year attracts a significant number of visitors as well as researchers and volunteers.

The Queensland Government vision for Mon Repos is to create a world class turtle research, conservation and visitor centre and a ‘must do’ ecotourism attraction in the Bundaberg region. The concept Master Plan will outline the vision and guiding principles for the site and preliminary business models, land-use and site design concepts and recommended visitor experience and interpretation strategies to develop the site over time. Mon Repos is considered to have strong potential for increased, improved and commercially viable tourism attractions that are in harmony with national park values. This potential was confirmed through this project in close consultation with the Department of National Parks, Recreation, Sports and Racing (NPRSR), the Project Steering Committee, Reference Group and other key stakeholders.

The Long View Group (TLVG) and partners (Lat27, Possible People, Inspired by Marketing and Hierophant Communications) were engaged by NPRSR to deliver the initial concept Master Plan for Mon Repos.

1.2. Concept Master Plan Report

The structure of the Concept Master Plan Report is as follows:

Executive Summary: Overview of this Master Plan report.

Section 1: Introduction and project background

Section 2: The study approach (including the Government’s vision for Mon Repos).

Section 3: A review of relevant Government policy.

Section 4: Context and Site analysis (including a review of land use planning and tenure, a preliminary overview of environmental constraints and site analysis).

Section 5: Overview of Mon Repos Marine Turtles including their highly migratory and complex life cycles, threats to their long term survival and conservation priorities going forward.

Section 6: Market analysis including an experience audit of Mon Repos, market and competitor assessment, market attractiveness, target markets and customers and potential activities Mon Repos.

Section 7: Interpretive experience analysis and master themes for the site.

Section 8: Existing business analysis (including review of the existing business model and benchmarking analysis to derive critical success factors for the project).

Section 9: Competitive position and brand for Mon Repos

Section 10: Summary of the potential opportunities for the site.

Section 11: Proposed concept master plan for the Mon Repos Turtle Centre.

Section 12: Proposed business and governance arrangements for the Mon Repos Turtle Centre.

Section 13: Proposed Turtle Conservation Roadmap.

Section 14: Potential Staging.

Section 15: Community Consultation
2. STUDY APPROACH

2.1. The Brief

The vision for Mon Repos is to create a world class Turtle Conservation Visitor Centre and a ‘must do’ ecotourism attraction in the Bundaberg North Burnett Region. In summary, the concept Master Plan will make recommendations on a ‘Gateway’ redevelopment of the Mon Repos Visitor Centre that considers the needs for:

- World class turtle conservation and research;
- Facilities to reinforce or expand the research training and potential partnerships with tertiary institutions;
- ‘Year round’ experiences and activities;
- An expanded range of opportunities for visitors to have natural encounters during peak season (that educates visitors on the importance of conservation through hands-on learning experiences); and
- Incorporating commercial opportunities (including but not limited to retail, food outlet and overnight eco-accommodation) and/or links to other regional commercial tourism/accommodation business.

Expanding on this, the key considerations for the redevelopment and concept master planning of the Mon Repos site include:

2.1.1. Centre of Excellence for Turtle Conservation and Research and Interpretation

Mon Repos is an important index site that assists in understanding the size of the loggerhead population. The site has a significant reputation attracting high profile researchers such as Dr Col Limbus (Chief Scientist, Aquatic Threatened Species and Threatening Processes, Department of Environment and Heritage Protection and Adjunct Associate Professor in the School of Veterinary Science, University of Queensland) who has undertaken pioneering conservation and management research and education programs on marine turtles in Australia for over 30 years. Other research initiatives undertaken at the site include satellite turtle tracking. The concept Master Plan for Mon Repos would need to include consideration of the redevelopment of the Visitor Centre to incorporate a centre of excellence for turtle research and conservation, attracting research linkages and providing leading training and management services on turtle conservation and ecotourism in Australia. Innovative business and partnership models also need to be considered where funds generated through ecotourism are reinvested into research, conservation and education activities.

Protecting and conserving a threatened species is a key consideration of the Mon Repos Concept Master Plan.

2.1.2. A World Class ‘Encounter with Turtles’ Experience

The Connect with Nature – Encounter with Turtles experience at Mon Repos attracts many domestic and international visitors each year. During the peak turtle season between October – April visitors can witness a unique and iconic natural experience: the annual pilgrimage of marine turtles where adult females come ashore to lay eggs and eight weeks later young sea turtles hatch and return to the ocean.

Although there are facilities and protocols in place to manage visitation during this period, current operations can be improved to provide a high quality ecotourism experience for visitors. NPRSR acknowledge that Mon Repos is currently challenged during peak period. The Visitor Centre cannot cater for visitor volume and has limited opening hours, interpretation and education resources are outdated, food and refreshments are minimal, and there in only one type of tour on offer.

The concept master plan for Mon Repos would need to consider how the ‘encounter with turtles’ experience can become a world class experience. This includes considering upgrading of the Visitor Centre, interpretation resources and tour options to continue to be in line with best practice approaches; and providing visitors with a range of complementary ecotourism activities and facilities (including consideration of retail, dining and accommodation experiences) that enhance and broaden their experience outside of turtle viewing hours and season.

Providing interpretation strategies and visitor facilities that create a world class ‘encounter with turtles’ visitor experience is a principle for consideration in the Mon Repos Concept Master Plan.

2.1.3. Commercial Ecotourism Investment Opportunities

Innovative investment partnerships are critical to developing a quality ecotourism experience that can cater for visitation during peak turtle season, but also attract visitors to the site and surrounds during non-peak seasons. The redevelopment of Mon Repos into a world class conservation and research centre and ecotourism experience will require partnerships between the local and State Government, private operators and research institutions.

The Concept Master Plan for Mon Repos would require a strong vision for the site, brand enhancement, and strategies for achieving a successful outcome over time through a staged investment approach. Research into other commercially successful ecotourism models and learnings from these case studies is essential, as is site context analysis and land use tenures to determine planning constraints and opportunities for developing the site.

Master planning of the site is important. However, any proposed development on the site is highly sensitive and it is a given that any such options must not in any way detrimentally affect the turtle rookery and experience.

Identifying new revenue streams and a business model that can generate resources for scientific research is to be considered as part of the Mon Repos Concept Master Plan.
2.2. Guiding Principles

The following describes the Guiding Principles that have been applied in the development of the concept Master Planning options in addition to the above Brief:

- Turtles are key to the attraction
- Engage visitors through purposeful participation and education
- Encourage and embrace local community support and involvement
- Position Mon Repos around world leading research and conservation
- Strive to effect positive change in post visit behaviour
- Take charge of turtle habitat protection

Figure 2.2 Guiding Principles for Mon Repos Concept Master Plan

2.3. Overview of Project Plan

The Concept Master Plan for Mon Repos was delivered by mid-December 2013. The following figure identifies the key tasks and their timing in the program of delivery of the Concept Master Plan for the site.

Figure 2.3: Project Plan for Mon Repos

2.4. Stakeholder Engagement

Stakeholder engagement and input into the master planning process is primarily through a Project Steering group and site-based Reference group. Members of these groups include representatives from NPRSR, the Department of Environment and Heritage Protection (EHP), the Department of Tourism, Employment and Small Business (DTESB) and Tourism Events Queensland (TEQ) as well as other statutory agencies, Bundaberg Regional Council and regional tourism representatives. These stakeholders have been primarily engaged through a workshop processes to develop a shared view or consensus of direction; however, individual members have also been consulted for follow up information and data.

Key stakeholders outside the project steering and reference groups include relevant local members of parliament, researchers, Traditional Owners, and commercial operators adjacent to the site.

Timeframes for community feedback on this concept Master Plan is provided in Section 15.
3. STRATEGIC POLICY REVIEW

This section provides an overview of the key policies, legislation and strategic directions that govern the project and guide the concept master planning process.

3.1. Overarching Strategic Direction

The Queensland Government’s Six Month Action Plan requires that draft concept master plans for the three Gateway Centres be delivered by mid December 2013. This is a non-negotiable deadline representing a priority commitment that will enable Government to determine next steps for each of the sites including Mon Repos.

DestinationQ is a key government commitment that aims to grow the tourism industry in Queensland and double overnight visitor expenditure to $30 billion by 2020. Implementation of the policy is led by the Department of Tourism, Employment and Small Business and the Commonwealth Games (DTESB) and Tourism Events Queensland (TEQ). The DestinationQ Blueprint 2012-2015 has the interim target of increasing tourism expenditure to $23.5 billion by 2015.

Queensland Tourism 20 Year Plan (draft Industry Vision)

The Queensland Government has turned the seven CSIRO mega-trends that will shape the world into a plan for the tourism industry for the next 20 years. The vision for the tourism industry is:

“Our diverse iconic experiences will be the foundation of our destinations, and our destinations will be the foundation of our tourism success. Our destinations will showcase the best of Queensland – our people and lifestyle, our culture and heritage, our natural wonders and climate and our communities. The tourism industry will be strong & prosperous, fully engaged with governments and the community, and universally recognised as fundamental to Queensland’s economic, environmental and social future”

The vision will be achieved through a number of strategies that include preserving our natural and cultural assets, offering iconic experiences, building strong partnerships and growing investment and access.

The Mon Repos Master Planning project is well positioned to align with the 2033 vision through the conservation and protection of an iconic wildlife that provides visitors with lifelong memories. In addition, the master planning process provides the opportunity to build partnerships around conservation, as well as attract commercial operations at the site, and identify means for investment in the site that would have co-benefits that support the long term regional tourism goals of the Bundaberg North Burnett region and the Southern Great Barrier Reef.

National parks (including Regional Parks and Conservation Parks) with their unique natural and cultural values and iconic wildlife play a vital role in positioning Queensland as a world class ecotourism destination. As part of the DestinationQ Partnership Agreement, NPRSR is committed to increasing ecotourism opportunities on these parks by introducing a range of enabling policy and legislative measures. The Queensland Ecotourism Plan 2013 – 2020 sets the strategic direction for achieving the 2020 vision of establishing Queensland as a world class ecotourism destination through facilitating the development of new and unique ecotourism experiences and reinvigorating existing ecotourism experiences to attract emerging growth markets.

3.2. Regional Tourism Objectives

As part of the DestinationQ Action Plan, TEQ, in partnership with regional tourism organisations is also identifying the ‘hero’ experiences for each destination in Queensland. These hero experiences highlight the unique selling points and competitive advantages of each destination which provide the focus for future marketing opportunities and ongoing tourism product development.

Bundaberg Region ‘Hero Experiences’ have been developed to deliver the region’s 2020 tourism vision, brand promise and the ‘themes’ that underpin the vision and brand. The vision is that: “By 2020 the Bundaberg and North Burnett Region will be globally recognised as the place visitors go to immerse themselves in a world class turtle conservation experience.” One of the four key themes for the region is turtles and in particular to “Witness the cycle of life and one of the true wonders of the natural world as hundreds of sea turtles return to the beach every year to nest and their hatchlings then make their perilous journey back to the sea.” Supporting attributes and potential clusters for this theme include Mon Repos nesting and hatching season, Lady Elliot, resort accommodation, glamping, snorkel and dive.

The Bundaberg North Burnett Destination Tourism Strategy 2012-2016 aims to “guide tourism industry development in the Bundaberg North Burnett region by coordinating stakeholders in a common direction to maximise the tourism potential of the destination so as to achieve a balance of economic, social and environmental outcomes.” The Strategy outlines a coordinated approach to attracting target markets, towards marketing and promotion of the region as Australia’s premier location for observing nesting turtles and the gateway to the Southern Great Barrier Reef. Working closely with State Government agencies and other partners to ensure that Mon Repos becomes a year round world class visitor and conservation experience is one of the priorities identified for the strategy.

The Bundaberg Fraser Coast Tourism Opportunity Plan 2000 – 2019 provides direction for the sustainable development of tourism in the Bundaberg and Fraser Coast regions over the next ten years to 2019. The Plan aims to:

1) Identify new and upgraded tourism product that meets future visitor expectations and demands;
2) Identify the need for new investment in infrastructure that supports the ongoing development of tourism;
3) Provide relevant research based information on tourism supply and demand; and
4) Provide an agreed focus and mechanism for engagement with tourism industry, infrastructure providers and private investors.

NPRSRT, DTESB, TEQ and the Bundaberg North Burnett Regional Tourism (BNBT) have been undertaking strategic planning and community consultation for Mon Repos for a number of years in support of the world class vision for the site. A Mon Repos Turtle Experience Workshop was convened by NPRSR in late 2010 and the Tourism Summit ‘Tourism is Everybody’s Business’ was convened by BNBT in August 2013. Key points from these two workshops are summarised below:

NPRSR Mon Repos Turtle Workshop, 2010

Key points from the workshop include:

- Turtle watching at Mon Repos Conservation Park is a well-managed signature wildlife tourism experience perfected over many years with the support of local staff, researchers and volunteers.
- The turtle experience at Mon Repos is a unique experience and recognised as an iconic “natural encounter” experience in marketing of Queensland.
- A successful research and monitoring program is integral to this experience.
- Mon Repos is operated with a skeleton of experienced staff supported by dedicated volunteers.
- Facilities at Mon Repos are becoming dated. Expansion is constrained by available space, funding and staffing.
- Freshwater turtle studies offer some additional tourism and scientific opportunities and there are some operational management challenges associated with this.
- Tourism Queensland and Bundaberg Region Tourism regard Mon Repos as a signature experience and have invested in a major tourism campaign in 2010-11 based on the turtle experience.
- Current visitation is centred on the laying and hatching season and predominantly from 6pm to midnight and maximum capacity is set and managed through the booking system.
- There is scope to increase visitor use of Mon Repos on the shoulders of the peak season or to introduce new tourism products and off-season visitor options.
- Scope to expand education programs, especially during the off-season, or provide a greater tourism product range, is very limited without extra staffing.
- The Coastal Walk that has recently been opened and has the Mon Repos Visitor Centre along its path. More visitors are coming to the Centre during daylight hours as a result and this is expected to increase over time.
- The Mon Repos Visitor Centre is not staffed during daylight hours and the Coastal Walk creates visitor engagement opportunities during the day.

BNBT Tourism Summit

Key points from the workshop include:

- Turtles were identified as one of the unique selling points for why people would come to the region;
- Turtles were one of the known global brands for the region alongside Bundaberg Rum and Ginger Beer;
- A turtle festival around the turtle season would be a significant attractor of additional visitation and spend in the region; and
- The turtle interpretive centre should be a year round experience with different pay points ($10 to $100 depending on the experience).

The Tourism Summit identified the priority to create a year-round turtle experience.

3.3. State and National Marine Turtle Conservation

Marine turtles are listed under the Queensland Nature Conservation Act, 1992 and Commonwealth Environment Protection and Biodiversity Conservation Act, 1999 and are ranked as a critical priority under the Department of Environment and Heritage Protection (EHP) Back on Track species prioritisation framework.

- Loggerhead turtles (caretta caretta) are listed as Endangered in Queensland and nationally;
- Green turtles (Chelonia mydas) are listed as Vulnerable in Queensland and nationally;
- Flatback turtles (Natator depressus) are listed as Vulnerable in Queensland and nationally;
- Hawksbill turtles (Eretmochelys imbricata) are listed as Vulnerable nationally; and
- Olive Ridley (Lepidochelys olivacea) are listed as Endangered in Queensland and nationally;

The Queensland Turtle Conservation project is a long-term research, monitoring and conservation management project within the EHP that has been in operation since 1975. The project conducts research and monitoring of Queensland’s turtle populations. It provides critical data to guide policy and management planning towards maintaining sustainable turtle populations in the face of expanding human impacts. The project has three main research and monitoring focuses:

- Nesting populations of marine turtles at index beaches within each genetic stock for each species in Queensland;
- Marine turtle feeding ground populations along the Queensland coast; and
- Threatening processes impacting freshwater turtle species in Queensland.

Marine turtles are recognised internationally as a species of conservation concern. The six species found in Australia are listed in the 2000 IUCN (World Conservation Union) Red List of Threatened Animals. All marine turtle species occurring in Australian waters are listed on Appendix I of the Convention on International Trade in Endangered Species of Wild Fauna and Flora.

In addition, all marine turtles occurring in the Indo-Pacific region are a priority for conservation under the Convention on the Conservation of Migratory Species of Wild Animals (CMS, also known as the Bonn Convention). The flatback turtle is listed on Appendix II of the CMS and the other species are listed on both Appendices I and II. Australia is also a signatory to the CMS Memorandum of Understanding on the Conservation and Management of Marine Turtles and their Habitats of the Indian Ocean and South-East Asia (IOSEA MoU). The MoU is designed to facilitate national level and trans-boundary actions that will lead to the conservation of turtle populations and their habitats (see box for more information).
The Convention on the Conservation of Migratory Species of Wild Animals aims to:

“... protect, conserve, replenish and recover marine turtles and their habitats of the Indian Ocean and South-East Asian region, working in partnership with other relevant actors and organisations”.

Membership includes 119 parties from Africa, Central and South America, Asia, Europe and Oceania.

The Agreement Area covers 41 Range States. The MoU applies to the waters and coastal States of the Indian Ocean and South-East Asia and adjacent seas, extending eastwards to the Torres Strait.

The MoU intends to develop a coordinated network of interested stakeholders, deliver a comprehensive programme of necessary interventions, and provide an inclusive forum for regular review. The threats to marine turtles that are addressed through the MOU include unsustainable exploitation, destruction of nesting and feeding habitats and incidental mortality in fishing operations.

The Australian Government has developed the Recovery Plan for Marine Turtles in Australia, 2003 in response to the threats facing marine turtle populations and the related national and international policy drivers and conventions. The specific objectives of the Plan are:

1) To reduce the mortality of marine turtles and, where appropriate, increase natural survivorship, including through developing management strategies with Aboriginal and Torres Strait Islander communities for the sustainable use of marine turtles.
2) To develop programs and protocols to monitor marine turtle populations in Australia, assess the size and status of those populations, the causes of their mortality and address information gaps.
3) To manage factors that affect marine turtle nesting.
4) To identify and protect habitats that is critical for the survival of marine turtles.
5) To communicate the results of recovery actions and involve and educate stakeholders.
6) To support and maintain existing agreements and develop new collaborative programs with neighbouring countries for the conservation of shared turtle populations.

The 2003 Plan estimated that $5.6M investment was required over a five year period to recover marine turtle populations in Australia. However there is currently no Federal Government funding available for implementation of the Recovery Plan.
4. CONTEXT & SITE ANALYSIS

4.1. Tenure and Land Use

Mon Repos is located 14 kilometres away from Bundaberg in Bargara on the Woongarra Coast on Plan No. QPN1055. Figure 4.1 provides an overview of the site boundary and the study area for this analysis.

The area now within Mon Repos Conservation Park was declared an Environmental Park under the Land Act in 1990. In 1994 it was re-gazetted as a Conservation Park under the Nature Conservation Act 1992 (NC Act). It includes 45 hectares of beach and coastal vegetation.

From October 2013 the land tenure of Mon Repos was classified as Regional Park which is a new tenure category under the NC Act that replaces the previous tenure of conservation park. The regional park tenure category has management principles that explicitly provide for access, with a particular emphasis on recreation and tourism. It also provides for a range of specific commercial activities that are similar to those currently set out in conservation parks and resources reserves. The management principles for regional parks provide for a level of protection to the environmental and cultural values of the land, but in a manner that recognises the importance of other priorities.

Mon Repos Conservation Park is bounded to the west by caneland (owned by Bundaberg Sugar), to the east by the Great Sandy Marine Park and conservation areas to the north and south. On part of the southern boundary is an unused former caravan park which is privately owned. Peri-urban residential development is also identified towards the south-west and north of the site. On the entry into Mon Repos is a Bundaberg Regional Council (BRC) waste facility disposal site (Qunaba Landfill) located on Potters Road. Further to the south of Mon Repos is the Bundaberg Regional Council Barolin Nature Reserve. This area has been conserved in a deliberate attempt to assist in reducing the light spill from urban areas beyond.

Figure 4.1: Study Boundary for Mon Repos
4.2. Planning Scheme for Burnett Shire

The current local government planning scheme which covers Mon Repos is the Planning Scheme for Burnett Shire which was implemented in 2006 and revised in 2011. Under the planning scheme any development within the Sea Turtle Sensitivity Area or the Mon Repos National Park (identified in Figure 4.2) must:

- Preserve the ongoing use of the area by nesting sea turtles;
- Not compromise the habitat values of land used by nesting sea turtles and their hatchlings; and
- Incorporate only lighting that is located and designed so as to not adversely affect sea turtles.

Any development within the Sea Turtle Sensitivity zone is subject to the Specific Outcomes and Probable Solutions Overlay for Biodiversity. This overlay identifies the following:

- No lighting or reflection from lighting is visible from the beach as follows:
  - Outdoor lighting is low pressure sodium vapour lighting fitted with hoods or fully screened (meaning no visible light transmitted direct from the lamp or light fitting falls outside the site) and directed away from the beach so that no light is visible from the beach; and
  - Indoor lighting is shaded through glass tinting on all windows facing or seen from the beach with a transmittance value of 45% or less and light transmitted being limited to 400 to 700 nonometers spectrum.

4.2.1. New Planning Scheme

A new planning scheme is currently being developed by BRC to replace the four planning schemes that are currently in operation within the Bundaberg region. The new planning scheme is being prepared over a two and a half year period and as stated on the Council website, the final version of the planning scheme was scheduled to be adopted by Council in 2013.

4.3. Barolin Nature Reserve

Barolin Nature Reserve is situated to the south-west of Mon Repos and is managed by BRC for environmental purposes. The reserve has a long history of cattle grazing which is slowly being reduced to encourage the high conservation value of its plant communities. The reserve is set on over 300 hectares and includes large areas of natural bush, grassy plains and wetlands. Council has provided over 4km of paths for walking and bike riding within the reserve and these link to Davidson Street as well as the turtle trail (see below).

4.4. Turtle Trail

The Turtle Trail is a walking and cycling path that links Kelly’s Beach Bargara to Burnett Heads Harbour. It includes Mon Repos, the Burnett Heads South Parklands Harbour and Kelly’s Beach. The aim of the Turtle Trail is as follows:

- Improving accessibility to Mon Repos;
- Promoting healthy recreation and the spectacular scenery of the Coral Coast; and
- Linking Bargara and Burnett Heads.

Figure 4.5 provides an overview of the Turtle Trail.
4.5. Non-Indigenous Heritage Features

The Pasturage Management Plan provides an overview of the non-Indigenous history of the area. It states that in the 1870s Augustus Barton purchased part of the area and built a stately home which he called Mon Repos. He also built a small sugar mill and butchery where the Qunaba waste disposal facility is now located.

In response to increase demand for the growing cane industry, south sea islanders (referred to as kanakas at the time) provided the labour to plant and harvest crops. The first ship transporting people arrived in Bundaberg in 1879. The clearing of fields of rocks resulted in the construction of rock boundary fences referred to as ‘kanaka walls’ at the time.

The South Sea Islander Wall, located at Grange Road Mon Repos is listed on the State Heritage Register (see Figure 4.6 below). The boundary wall is over 1.5 kilometres in length and is identified as one of the longest and most intact examples of its type in the Bundaberg district. In the late 19th century these structures were common in Bundaberg exhibiting the dry-rubble wall construction employed in the district at that time.

The Register also states that the location is significant for better understanding the role of South Sea Islanders in the State’s history. The site is also identified as providing a strong association for the present local South Sea Islander community with the experiences of their ancestors as well as the history of exploitation of large South Sea Islands workforces employed in the Bundaberg district at that time.

Figure 4.6: Mon Repos Conservation Park Showing the Location of the South Sea Islander Wall

An underwater cable that was the first stage of a telegraph link that eventually connected Australia with Britain and Europe via New Caledonia was commissioned in 1893. The cable came ashore at Mon Repos at the north-east corner of the pasturage reserve (now Mon Repos Caravan Park). The Great Sandy Regional Management Plan has also identified that a heritage assessment is required of the Mon Repos international sea cable site.
4.6. Indigenous Cultural Heritage

The Aboriginal Cultural Heritage Act 2003 and Torres Strait Islander Cultural Heritage Act 2003 require anyone who carries out a land-use activity to exercise a duty of care. Land users must take all reasonable and practicable measures to ensure their activity does not harm Aboriginal or Torres Strait Islander cultural heritage. The cultural heritage duty of care can be met by acting in compliance with gazetted cultural heritage duty of care guidelines. Consultation with the Aboriginal or Torres Strait Islander party for an area may be necessary if there is a high risk that the activity may harm Aboriginal or Torres Strait Islander cultural heritage.

The Pasturage Reserve Management Plan 2013 identifies that the area around Mon Repos was originally inhabited by the Taribelang Bunda tribe and was a hunting ground for the turtle and its eggs. The Taribelang Bunda’s kinship totem was the sea turtle.

The Gooreng Gooreng, Gurang, Bailai and Taribelang Bunda Peoples are the traditional custodians of the land (covering an area of approximately 19,583 km² and extending from as far north as Portis Island to below Bundaberg and west to Monto. They are also the traditional custodians of the sea covering 26,386km² as shown in Figure 4.7 below.

Figure 4.7: Area of Sea included under Traditional Ownership (source PCCC Strategic Plan 2012-2030)

The Port Curtis Coral Coast Traditional Owners (PCCC) is made up of the Gooreng Gooreng, Taribelang Bunda, Bailai & Gurang tribal groups, there are 17 Apical Ancestors under the PCCC. The Gidarjil Development Corporation is an indigenous owned enterprise, based in Bundaberg and made up of representatives of the Gurang and the Gooreng Gooreng peoples. Gidarjil Cultural Heritage Corporation Ltd is currently the interim nominated body for the PCCC Cultural Heritage.

A Traditional Use of Marine Resources Agreement (TUMRA) has been agreed between PCCC & QLD & Australian Government. Under the agreement sustainable hunting practices will take place over five years (agreed September 2011) and there will be no traditional hunting of turtle and turtle eggs at Mon Repos Conservation Park. The PCCC are committed to taking no dugong, loggerhead and flat back turtles. Green turtle hunting will be limited to a maximum of five per group per year.

There are no areas within the Mon Repos Conservation Park exhibiting Indigenous significance whose integrity status is either under major threat or unknown. The Great Sandy Regional Management Plan makes reference to Mon Repos shell middens but notes these are located outside the boundary of the Plan.

Traditional Owners are recognised as a key stakeholder in the master planning process and it is intended that consultation for the concept Master Plan will be undertaken with the PCCC.

4.7. Waterways and wetlands

The Mon Repos site is bounded to the south by a small tidal creek draining a backing tidal flat and lagoon across the southern end (see Figure 4.8). A series of groundwater dependant ecosystems extend from the lagoon to the west of the Mon Repos site on Bundaberg Sugar land. At the surface appears to be a cane drain which extends towards the north of the site along its western boundary.
4.8. Protected Areas

As stated above in Section 4.1 Mon Repos is located within a Regional Park under the Nature Conservation Act, 1992.

In addition, the Great Sandy Marine Park extends from Baffle Creek in the north to Double Island Point in the south and includes Hervey Bay, Great Sandy Strait, Tin Can Bay Inlet and the waters off the east coast of Fraser Island, seaward to three nautical miles. The Marine Parks (Great Sandy) Zone 2006 which is established under the Marine Park Act, 2004 identifies Mon Repos as a conservation park with designations for turtle monitoring and turtle protection. These designations determine what types of activities are appropriate within these areas (for example no commercial trawling) and actions to protect turtles and their habitat as well as monitor impacts from human activity.

It should be noted however in May 2013 that commercial trawl fishers who were affected by the significant flooding to the Burnett River are now able to access the a new fishing area within the General Use Zone of the Great Sandy Marine Park between the northern bank of the Burnett River and the northern Boundary of Rules Beach. This area is opened from 31 August to 1 November and is part of a two year trial. All commercial fishing vessels using beam trawlers need to be fitted with appropriate Turtle Exclusion Devices (TEDs).

4.9. Ecology

Less than a third of the Mon Repos site (on the dune) is mapped as containing remnant vegetation, that is of concern sub-dominant regional ecosystem (see Figure 4.10a). The remaining eastern portion of the site is mapped as high value regrowth vegetation that is a least concern ecosystem. A smaller portion at the southern end of the site contains high value regrowth vegetation that is of concern (see Figure 4.10b). Discussions with local Rangers have identified that in the storm in January 2013 much of the vegetation on the site was destroyed and has been subsequently replanted.

A wildlife search has been undertaken using the Queensland Government Wildlife Online Database within one kilometre of the site to identify any listed threatened species that have been previously recorded within this area. As the database does not provide the exact location of the historical records within the 1km search area (the minimum radius for the search) is larger than the Mon Repos project site, it is difficult (apart from the turtle records) to establish which records occur within the Park or the broader area.

The search has identified the following vulnerable and engendered species:

- *Esacus magnirostris* beach stone-curlew (Vulnerable QLD);
- *Rostratula australis* Australian painted snipe (Vulnerable QLD, Endangered Aus);
- *Caretta caretta* loggerhead turtle (Endangered QLD and Aus);
- *Natator depressus* flatback turtle (Vulnerable QLD and Aus);
- *Lepidochelys olivacea* olive ridley turtle (Endangered QLD and Aus);
- *Chelonia mydas* green turtle (Vulnerable QLD and Aus); and
- *Dermochelys coriacea* leatherback turtle (Endangered QLD and Aus).
In addition to the State-based search, a protected matters search has been undertaken using the Australian Government database within one kilometre of the site to identify any additional listed threatened species that have been previously recorded within this area. As the database does not provide the exact location of the historical records and the 1km (the minimum radius for the search) is larger than the Mon Repos project site, it is difficult to establish which records occur within the Project Site or the broader area. The results of this search have indicated that a range of threatened species (birds, fish, mammals, plant and reptiles) and migratory marine species (marine birds, marine species, terrestrial species and wetland species) are likely to occur within the area.

More information on Matters of National Environmental Significance listed under the Environmental Protection and Biodiversity Conservation Act, 1999 can be found on the Federal Department of Environment’s website: www.environment.gov.au.

Weeds reported here are the 20 species of national significance (WoNS), along with other introduced plants that are considered by the States and Territories to pose a particularly significant threat to biodiversity. The following feral animals are reported: Goat, Red Fox, Cat, Rabbit, Pig, Water Buffalo and Cane Toad.
4.10. Coastal Issues

Mon Repos is located within a coastal management zone as identified in Figure 4.11a. This is an area where the Coastal Protection and Management Act 1995 (Coastal Act) applies. Mon Repos is also highly prone to erosion and impacts from storm tide inundation as outlined in Figure 4.11b.
Figure 4.11b: Stormtide Hazard Mapping
4.11. Site and Visitor Centre Analysis

4.11.1. Site Analysis

Figures 4.12a & b illustrate the existing site layout including location of key built form elements at Mon Repos. As identified there is an interpretive centre and research camp and adjacent to the site is an unused caravan park, nature reserve, existing residential and cane land.

![Existing Site Plan](image1)

![Current Site Arrangement](image2)
Mon Repos is currently constrained by a number of spatial, functional and condition issues that compromise the visitor experience and functional operation (see Figure 4.12c). Key issues include, but are not limited to:

- The site entry experience on Mon Repos Road lacks visibility and impact;
- The existing car park layout is inefficient, there is no dedicated staff parking and there are inadequate spaces for visitors on some nights;
- The existing QPWS operations office is in a temporary structure that is inadequate, poor quality and disconnected from the Centre;
- The entry to the Visitor Centre is not highly visible;
- The Visitor Centre is too small to cater for large groups of visitors which the Centre current experiences;
- The Visitor Centre is dated with exhibits requiring renewal, it doesn’t provide a viable year round visitor experience;
- There are no air conditioned areas within the facility, this is an issue for visitor amenity during hot, humid summer nights;
- There is inadequate space for marshalling of groups, including lack of cover/protection from wind and rain;
- Provision of visitor food, beverage and dining facilities is very poor, with spill out of queues under the trees and the provision of one food van to provide refreshments;
- The open amphitheatre requires refurbishment and cover, particularly for wet weather conditions;
- The Visitor Centre lacks a range of informal breakout and seating areas for visitors waiting to go on the beach;
- Office, meeting, amenity and accommodation facilities for the researchers are inadequate and dislocated from the Visitor Centre;
- There is no vegetated buffer to the adjacent caneland, this presents a poor and unprotected arrival experience.

For this reason the Master Planning process has identified that future investment is required to upgrade and extent the current Visitor Centre to support the visitor experience and long term vision for the site.

Figures 4.12d, 4.12e and 4.12f provide a detailed appraisal of the site.
Existing Car parking
- Under sized at peak season
- Not legible

Existing Research Camp
- Inadequate facilities

Existing Research Camp
- Inadequate facilities

Existing Research Camp
- Inadequate facilities

Existing beach Entry
- Outside control of QPWS

Poor aspect to caneland
- Inadequate buffering/future risk to habitat through development
- Limited ecological benefit to the site and fox threat

QPWS Operations office/container
- Inadequate accommodation

Kanaka Stone Wall
- High cultural value

Figure 4.12d: Detailed Site Appraisal
Figure 4.12e: Detailed Site Appraisal

**Existing Open Amphitheatre**
- Inadequate shade and rain protection
- In need of maintenance refresh

**Arrival Experience**
- Too enclosed, inadequate marshaling space

**Arrival Experience**
- Too enclosed, inadequate marshaling space

**Existing beach access**

**Queuing/spill out space under trees + food van**
- Poor amenity; no rain protection
- F&B Offer inadequate

**Public WC’s**
- Inadequate
- No Staff facilities

**Low / no light spill lighting required**
Figure 4.12f: Interpretive Centre Display Space
5. MARINE TURTLES

5.1. Overview

Marine turtles have navigated the world’s oceans for over 100 million years. These ancient marine reptiles have significance for mythology and folklore for many coastal Indigenous cultures including Aboriginal and Torres Strait Islanders. Marine turtles are considered by many as mystical, unique and a source of living wonder. There are only a few large nesting populations of the green, hawksbill and loggerhead turtles left in the world. Australia has some of the largest marine turtle nesting areas in the Indo-Pacific region and has the only nesting populations of the flatback turtle. Queensland and associated coastal waters are important breeding and feeding habitat for marine turtles. Six of the seven marine turtle species use the coastal waters of Queensland and/or have resident feeding and breeding populations in Queensland. These six species are listed below.

- Green Turtle;
- Loggerhead Turtle;
- Hawksbill Turtle;
- Flatback Turtle;
- Olive Ridley Turtle; and
- Leatherback Turtle.

Mon Repos supports the largest concentration of nesting marine turtles on the eastern Australian mainland which is estimated at between 300 – 400 nesting loggerhead turtles. It is the most significant loggerhead turtle nesting population in the South Pacific Ocean region. A smaller population of green turtles and flat back turtles also nest at the rookery. The loggerhead turtle species (caretta caretta) is listed as endangered in Queensland (Nature Conservation Act 1992) and endangered nationally (Environment Protection and Biodiversity Conservation Act 1999).

Primarily due to the activities of humans, however, turtles are threatened with continuous decline and for some species, potential extinction. Marine turtles are highly vulnerable to human encroachment on their breeding grounds, damage or death at sea due to boat strikes and fishing activities and ingestion or entanglement in wastes such as plastics. Further to this, some indigenous communities in the Indo-Pacific unsustainably harvest marine turtles for meat and consume their eggs. Turtles are also still taken for the souvenir market and despite international bans, trade in tortoiseshells taken from hawksbill turtles continues.

Marine turtles are also highly migratory. Species that breed in Australia travel to many other countries in the Indian and Pacific oceans. Loggerhead turtles breeding at Mon Repos travel to New Caledonia, the Solomon Islands and Papua New Guinea. Therefore international cooperation is needed to enhance the effectiveness of any domestic conservation efforts.

Appendix A provides an overview of the long and migratory life histories of marine turtles, the current distribution, abundance and status of marine turtles in Queensland and the local, regional and global threats they experience as they grow from hatchlings, to post hatchlings and into adults.

5.2. Marine Turtle Research at Mon Repos

The Department of Environment and Heritage Protection (EHP) operates the Queensland Turtle Conservation project into the long-term research, monitoring and conservation of marine turtles. The project provides critical data to guide policy and management planning with a focus on index beaches for each genetic stock species in Queensland, marine turtle feeding population grounds along the Queensland coast and threats impacting freshwater turtle species in Queensland.

Queensland’s loggerhead turtle research program has been running for more than 40 years. Satellite tracking has been used a number of times, but the latest next generation tags used in the current program provide much more accurate data than previous technology. The new GPS satellite tags are attached to the back of each turtle and determine the latitude and longitude location when the turtle surfaces for a breath. The resulting data provides vital information about turtle migratory patterns and breeding habits. In the summer of 2010, three female loggerhead turtles were tracked along the southern Queensland coast. The data revealed that these creatures travelled long distances over a five-month period.

Research and monitoring activities are conducted by EHP staff and volunteers stationed at Mon Repos. The project incorporates annual volunteer training, where volunteers undergo training in research and monitoring techniques and data collection. This training is primarily conducted at Mon Repos. The data collected is collated within a central EHP database and is summarised in annual reports produced by EHP staff and volunteer team leaders. The information is used to guide conservation management planning.

During turtle season, researchers, rangers and volunteers protect turtle nests, carry out research and monitoring, and raise public awareness through guided tours for visitors. Dr Col Limpus estimates that each nesting season in South-East Queensland more than 50,000 extra loggerhead hatchlings are protected by staff and trained volunteers rescuing doomed eggs and protecting nests from erosion and fox and dog predation.

5.3. Conservation Priorities at Mon Repos

There are a range of issues impacting marine turtles that require concerted and coordinated action across a range of governments/organisations to address (local, state, national and international). A number of issues can be addressed at the local level and actions have been identified that are critical to Mon Repos turtles specifically.

There is an identified need to establish a Turtle Foundation for marine turtles that would seek to progress some actions and also seek to garner financial support to progress the work at Mon Repos specifically.

Dr Col Limpus in his presentation titled Queensland Turtle Conservation, 2013 has identified the following conservation priorities for Mon Repos.
Figure 5.3: Conservation Priorities for Mon Repos

A suggested Turtle Conservation Roadmap for responding to these conservation threats and priorities is outlined in Section 13.
6. MARKET ANALYSIS

6.1. Introduction

The market analysis for Mon Repos reviews the current visitation market to the destination and identifies the key target markets from local residents, to domestic and international tourists.

A competitor assessment has been undertaken to determine the potential threats to the ecotourism offering as well as an assessment of the highest yield sectors within the target markets.

Understanding the motivations, drivers and preferences of core customers is critical to developing the brand and positioning strategy for the destination of Mon Repos. Figure 6.1 provides an overview of the process for the market analysis. The brand strategy and interpretive experiences are outlined in the next section.

6.2. Experience Audit

The experience audit identifies the current profile of visitors to Mon Repos, the visitor experience, community outreach including participation by volunteers, interpretation and education activities and visitor facilities. This overview is largely based on data provided in the Bundaberg North Burnett Visitor Centre and NPRSR Marine Turtle Season Reports 2012/2013.

6.2.1. Visitor Profile

Data collected by the Bundaberg North Burnett Visitor Centre provides a profile of visitation to the region. This includes:

- 75% domestic families;
- 20% Grey Nomads; and
- 5% international.

6.2.2. Visitor Numbers

Turtle watching at Mon Repos is seasonal. The season begins in mid-November and continues until the end of March of the following year. (Note: for operational purposes the turtle season is referred to as October – April). There are three phases in that period: in the earlier part, only nesting activities can be observed, in the second phase both nesting and hatchling emergence can be observed and in the final phase only emergence of hatchlings can be seen.

A total of 17,228 people visited the Mon Repos Information Centre at night during the 2012/2013 turtle season to view nesting and/or hatchling turtles. The Table below provides an overview of the visitation numbers for each month in the season.

<table>
<thead>
<tr>
<th>Month</th>
<th>Visitor Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>November</td>
<td>2979</td>
</tr>
<tr>
<td>December</td>
<td>6090</td>
</tr>
<tr>
<td>January</td>
<td>7430</td>
</tr>
<tr>
<td>February</td>
<td>729</td>
</tr>
<tr>
<td>TOTAL</td>
<td>17,228</td>
</tr>
</tbody>
</table>

The turtle tours reached the capacity of 300 per night from the 23 December 2012 through to 24 January 2013, after which the centre then closed due to weather conditions. It is estimated 3,000 visitors were turned away with tours at full capacity. In 2011/12 Mon Repos captured a 5.8% share of total interstate and international overnight visitors and attracted 29,311 visitors.

6.2.3. Visitor Experience

The Marine Turtle Season Report 2012/2013 prepared by NPRSR identified the following in terms of turtle viewing:
The 2012/2013 marine turtle nesting season operated for 81 nights of Turtle Encounters tours to the visiting public and 152 nights from 5 Nov to 9 April in 2011/12.

372 endangered Loggerhead turtles nested along the Woongarra coast in 2012/2013 and 400 in 2011/12.

21% of groups going to the beach went on a beach patrol as no turtles were present which is equivalent to what occurred in 2011/12.

The breakdown of visitor turtle watching groups to the beach for the season was: Before 8pm – 33%; 8.01pm to 10pm – 49%; 10.01pm to midnight -16%; after midnight – 2%.

The visitor experience at Mon Repos is successful as outlined in the experience summary from Trip Advisor in Figure 6.2 below. As shown, there are no poor or terrible reviews and only 5 average reviews. The vast majority of reviews were very good (22) and excellent (45).

Figure 6.2a: Trip Advisor Summary November, 2013

Box 1: Trip Advisor Review

"Absolutely wonderful experience ... By the time a turtle came it was actually gone midnight so we'd waited over 5 hours but it was for such an amazing thing we really didn't mind. There was hardly anyone left by this time so it was a nice small group. We were taken down to the beach and watched our turtle lay her eggs and cover them up. They decided they weren't in a safe location so we actually got to help relocate them which was beyond amazing. It was amazing being on the beach in the pitch black, the sky was amazing-we even saw some shooting stars. I'd love to go back some time and see the hatchlings!! Overall it was amazing, we did wait a long time but you can't hurry nature. If you are in the area it's unmissable!!” November 2012

The visitor experience at Mon Repos exceeds expectations in terms of the unique and iconic natural phenomena that is being witnessed and the interpretation and education activities undertaken in support of this experience. However there are a number of significant facility design and infrastructure factors that limit the visitor experience from achieving world class outcomes which need to be addressed by the concept Master Plan. These include:

Shoulder Season

The unpredictable nature of the turtle viewing season, in particular during the shoulder season needs to be considered so that visitors are not disappointed by not seeing any turtles or the latter groups having to wait for up to 5-6 hours to see a turtle. In the 2011/2012 20% of groups in the shoulder season (November – April) did not see any turtles.

Car parking

Visitor safety in the car park is a key concern. The current car park does not meet visitor needs during the season and regularly over flows. Vehicles then have to park on road edges all the way back to the EHP research base. Cars were also parked on any available space in the car park, which has seen emergency road entrances and turning areas blocked.

These issues reduce the ability for cars to use the road edge to allow oncoming traffic through and increase the risk for pedestrians walking along a dark road to get to their vehicles. Also, if visitors are unable to find a carpark, or have to park further down the road and walk back to the centre in the dark, their level of satisfaction is reduced before they even enter the visitor centre.

Wet or humid weather

The visitor information centre cannot cater for wet or humid weather conditions with a high level of discomfort for visitors waiting to view turtles and especially those with young children. Wet weather prevents the amphitheatre from being used during the season and on these nights staff has to use the television on the deck or in the centre to address the crowd. This system works poorly on nights and the viewing room is insufficient. Queuing in wet or humid weather is also a challenge particularly where there are long wait times and coordination of the various groups to go down to the beach.

Refreshments and Amenities

There are no refreshments currently offered by the Visitor Information Centre for people waiting to view the turtles. A refreshment van does service the site, however this is not adequate when there are hundreds of people waiting. The public toilets are also limited with only four provided.

Interpretation and Group Size

Less experienced rangers and volunteers may lack the in-depth knowledge and experience to answer questions or deal with situations as they arise. This is particularly the case for managing the large groups (60pax) or responding to questions such as animal handling ethics and photography. The interpretation and education provided is a highly successful component of the operation, however, staffing challenges can result in less than satisfactory interpretive experiences. The visitor experience can also be reduced where there is less staff available to manage the operation.
6.2.4. Turtle Research and Conservation

The Queensland Turtle Research Program is one of the important places where intensive research is being carried into the biology, reproductive and migration studies of tagged marine turtles, annual surveys of nesting turtles, behavioural studies, incubation studies and conservation of sea turtles in Australia. Mon Repos is an important training centre for research program volunteers and wildlife managers from Australia and the Indo-Pacific region. Volunteers from Mon Repos assist marine turtle research throughout Queensland.

6.2.5. Community Experience

Two significant community campaigns were run by the Ranger in Charge at Mon Repos in 2012/13. These are:

- **Cut the Glow to help Turtles Go campaign:** aimed at reducing the glow from lights affecting nesting sea turtles on beaches in the greater Bundaberg area. During the breeding season from November to March, the community can help by joining the campaign and following some easy guidelines to reduce light glow. This community program was funded through visitor purchase/donation of turtle certificates.
- **Ringing of the Bells activity to advise the community of the arrival of the seasons 1st nesting turtle (1st turtle nested 25/10/12).**

These programs are found to be highly effective at engaging the community.

6.2.6. Turtle Conservation Volunteers

Community volunteers are critical to the successful delivery of the ‘encounter with turtles’ experience. Volunteers donated in total 2276 hours over the season and this contribution is vital to the overall running of the visitor centre and guiding of groups. The strongly coordinated volunteer program has been successful in retaining volunteers and providing training and experiences to meet volunteer and Ranger needs. Due to great retention rates, 65% of the volunteer team have been working with NPRSR for 3 years or more, only 7 new volunteers were recruited to complete the volunteer team. 35 dedicated volunteers assisted with the nightly running of the information centre, with 11 of those sharing their time between the visitor centre and the beach. 4 Turtle Guides took guided interpretive tours and managed groups on the beach.

6.2.7. Education and Interpretation

Use of the beach by the public is restricted during the nesting season. Visitors are taken to the beach to view marine turtles at night under guidance of Rangers and volunteers. The education and interpretation experience currently involves Rangers on the beach explaining the egg-laying process of sea turtles and hatching behaviour. The display centre and audio-visual presentations provide further information on sea turtle nesting behaviour, about their life history, migration, biology, evolution, and about turtle research and conservation. Children’s activities are often delivered during the turtle season. Volunteers run the majority of these activities.

<table>
<thead>
<tr>
<th>Box 3: Mon Repos as a driver for ecotourism and turtle conservation</th>
</tr>
</thead>
</table>
| Mon Repos is a highly regarded visitor information centre that contributes to the conservation of marine turtles and has a positive impact on conservation but also provides recreational and economic benefits to the region of Bundaberg. A study conducted by the CRC Tourism in 2002 titled Economic, Education and Conservation Benefits of Sea Turtle Based Ecotourism: A Study Focused on Mon Repos evaluated the visitor offering of the site through a research survey of 1200 visitors (n=519).

The study found that due to the **on-site marine turtle research** being conducted at the site and the **ranger led interpretation** and visitor experiences Mon Repos fulfills the conditions of ecotourism and is "conducted in a manner careful of the environment, provides education about marine turtles, and is designed to make visitors aware of conservation problems facing turtles and informs visitors of ways in which they can help conserve marine turtles.” Other key findings from the study include:

- **The long-term conservation of turtle species is dependent on local political support as well as wider community support.** The programs at Mon Repos are fostering both as demonstrated by the visitor surveys.
- **The majority of surveyed visitors came to Mon Repos to watch marine turtles (78%) while some came especially to study marine turtles (11%) and entertain visitors (9%).**

---

Box 2: Trip Advisor Review

“After about a 45 minute wait, and mounting surprise at the huge numbers of people present, plus the unsuitable ages of some of the children (a 6 hour wait for a two year old to see something they won’t even remember is probably not ideal), we were allocated our group sticker. Group 5 - the last group. Which meant that we would be called only after all the other groups were taken to the beach to see a turtle, and that we would have the longest wait. Also, it appeared that each group would contain approximately 50 people, which did not really fit with what we imagined. That is quite a large group for one solitary turtle. There is an information centre to browse, but 30 minutes is ample time for this. There is a caravan selling highly priced food ... and a few short dvds (non animated - just still shots) to watch, but otherwise, you just wait. Fair enough, we were prepared to wait. Unfortunately, the first turtle did not arrive until 9.45 pm at which time the first group was assembled. Obviously a slow night for turtles. At 10.40pm, when the second turtle arrived and the second group was assembled, it started to rain. Along with the weather, the screams of grizzling, crying, over tired young children, and the knowledge that our group was 3 more down the list and turtles were scarce, we left. Other nights may be better, but it really is the luck of the draw. As I said, the anticipation outweighed the actual experience on the night we went, which in the end was disappointing.”
The overall income to the Bundaberg area due to the presence of marine turtles at Mon Repos is around 0.8 million Australian dollars per year. This estimate is on the conservative side with multiplier effects (such as the Turtle Festival), increasing the benefits to the region.

Data collected from the survey revealed that the majority of respondents (98%) were convinced that more action should be taken to minimise threats to marine turtles. It was revealed that the desire to protect marine turtles increased after visiting Mon Repos. The reasons cited included: marine turtles are unique (90%), because they are ancient (66%), have recreational value (32%) and they can generate income (23%).

Marine turtle viewing was a very satisfying experience and the majority of respondents (85%) wanted to return to Mon Repos.

The study also determined how much visitors are willing to pay for an adult to view marine turtles. Respondents on average were willing to pay more than the existing entrance fees for an adult and family group.

A considerable percentage of responding visitors (40%) said that their visit to Mon Repos would influence them to contribute more money for marine turtle conservation than before. It was inferred that the visitors to Mon Repos for the 1999/2000 season involved in sea turtle viewing would be prepared to pay at least $250,000 per year to protect sea turtles in Australia.

6.2.8. Interpretive Displays

The Visitor centre is pivotal to the visitor waiting experience. Even though the display panels are starting to show their age (they are 8 years old) they are still well received by visitors. Some panels currently need reprinting due to wear and tear.

6.3. Market Assessment

Domestic and International Tourism has been identified as the primary market for Mon Repos with four sub sets contained in the assessment below:

- Drive Tourism – domestic;
- Drive Tourism – international;
- Wildlife Tourism; and
- Voluntourism.

This target visitation market is based on current visitation to the Bundaberg North Burnett region and Southern Great Barrier Reef. As outlined in the Strategic Plan 2012-2016, in the year ending 30 September 2011 the Bundaberg North Burnett Region was host to 234,242 overnight travellers and 887,000 day trippers split as follows:

- 468,000 domestic overnight visitors (41% from Brisbane and 88% travelled by car – drive tourism);
- 38,000 international visitors; and
- 887,000 day trip visitors.

Bundaberg is also part of a larger region, the Southern Great Barrier Reef. The following profile overviews the regional visitation:

Table 6.2: Profile of Bundaberg Region Visitations

<table>
<thead>
<tr>
<th></th>
<th>Visitors</th>
<th>Holiday</th>
<th>Visiting Friends &amp; Relatives</th>
<th>Business</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic overnight</td>
<td>1,835,000</td>
<td>597,000</td>
<td>712,000</td>
<td>418,000</td>
</tr>
<tr>
<td>Annual % change</td>
<td>4%</td>
<td>-18%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>Total % change</td>
<td>4%</td>
<td>1%</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>International overnight</td>
<td>136,000</td>
<td>101,000</td>
<td>20,000</td>
<td>9,000</td>
</tr>
<tr>
<td>Annual % change</td>
<td>5%</td>
<td>2%</td>
<td>25%</td>
<td>13%</td>
</tr>
<tr>
<td>Total % change</td>
<td>-5%</td>
<td>-9%</td>
<td>0%</td>
<td>15%</td>
</tr>
<tr>
<td>Total</td>
<td>197,100</td>
<td>698,000</td>
<td>732,000</td>
<td>427,000</td>
</tr>
<tr>
<td>Annual change</td>
<td>4%</td>
<td>-15%</td>
<td>24%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Source: Tourism Events Queensland Southern Great Barrier Reef Snapshot, March 2013

Mon Repos will be positioned to increase market share of all existing markets.

6.3.1. Domestic Drive Tourism

The following profile of the touring visitor was prepared by TRA in their report Understanding the Queensland Touring Group, 2010. In the year ended June 2011, 8.7 million domestic leisure visitors and 662,000 international leisure visitors toured Queensland destinations by road. Typically, a domestic tourer:

- Stayed in Queensland for 12 nights on average;
- Travelled with their spouse (45%) or family (28%);
- Was over 40 years of age (70%); and
- Lived in Queensland (36%) or New South Wales NSW (34%).

The profile of Queensland’s domestic tourists has changed little over the last decade, with the exception being an increase in the proportion of visitors over 55 years of age (up nine percentage points) and the proportion of retirees and/or pensioners (up five percentage points). Key considerations for Mon Repos include:

- On average, domestic tourers spent 11.8 nights in Queensland during their trip, however, three in five (61%) trips were for 10 nights or less.
- Typically, domestic tourers began their journey in the south east corner of Queensland (Brisbane, Gold Coast or Sunshine Coast) (52%).
- On average, they visited three different locations spending at least one night at each and two-thirds (68%) explored one or two regions.
- More than half (54%) of domestic tourers were on a round trip, beginning and ending their journey at the same point in Queensland.
- Domestic tourers spent more nights in private (37%) or caravan or camping-style (28%) accommodation than other accommodation types.
From 2000 to 2010, the proportion of domestic tourers choosing caravan or camping-style accommodation in Queensland increased (up six percentage points). This was not surprising given the increase in the use of this style of accommodation across the domestic visitor market in Queensland over the same period.

6.3.2. International Drive Tourism

The following profile captures the touring visitor to Queensland including the Youth Traveller (also known as Backpackers) travelling up/down the Queensland coast. Key considerations for Mon Repos include:

- International tourers spent 26.4 nights in Queensland during their trip with around half (56%) of all trips in Queensland lasting two weeks or less.
- A further one in ten (11%) international tourers were in Queensland for more than 50 nights, many of whom were on a working holiday visa.
- International tourers most commonly began and ended their Queensland journey in Brisbane (42% began, 41% ended), Gold Coast (20%, 17%) or TNQ (19%, 23%). This was not surprising given that Queensland’s major airports are located in these regions, and that half (48%) began and ended their journey in Queensland at the same point.
- While almost half (48%) visited three regions or more, one in five (22%) stayed in the one region the whole time they were in Queensland.
- One-third (35%) stayed solely within the south-east corner of Queensland (Brisbane, Gold Coast and Sunshine Coast) the entire time they were in Queensland.
- Over half (54%) of international tourers used hotel, motel or resort style accommodation for at least one night during their trip.

6.3.3. Voluntourism

Voluntourism is the practice of individuals going on a nonpaid working holiday for the purpose of volunteering themselves to worthy causes. The industry has experienced enormous growth in the number of companies operating, volunteers travelling and, projects and regions available. Whilst often cited as one of the fastest growing sectors of tourism, no comparable statistics really exist to determine the exact size of the voluntourism market. This is partly due to differences of definition in what constitutes voluntourism, versus volunteerism or tourism, and partly due to immeasurability of its activity. Various (incomparable) market statistics (source: http://volunteertourismviews.wordpress.com) include:

- In 2004, there were more than 800 organisations providing overseas volunteering in 200 countries.
- In 2006, voluntourism was estimated to be worth US$150 million.
- In 2008, a Tourism and Research Marketing survey of 300 organisations estimated the market size to be 1.6 million volunteer tourists per year worth £1.3 billion.
- In 2008, the market was estimated to have grown 5-10% in Western Europe over the course of five years.
- In 2009, GeckoGo’s survey of more than two thousand voluntourists worldwide found the UK to be the third largest originating market.
- In 2012, 35% of adults said they would like to try a holiday involving a voluntourism component, in addition to the 6% who had already done so.

The key profile, motivations and expectations of this market are outlined in the Georgian College report Give a Little. Get a Lot. 2010 as follows: “Most voluntourists were aged 20-39 and were single, married without children, highly educated and avid travellers. Their motivations include an interest in travelling, and an interest in environmental conservation, community tourism or community development. They have expectations of time and cost that can be spent on travelling – with most wanting to volunteer between 4-8 hours a day and spend less than $1500 on the trip”. The study recommended a number of packages and options that respond to individual motivations: altruistic, local, definitive, adventure.

6.3.4. Wildlife Enthusiasts

The following profile of Wildlife Tourists has been drawn from a CRC study on Wildlife Tourism 2009. (Wildlife Tourism, CRC 2009). While there are many references to the size and growth of this market in the existing literature, very little is known about the actual demand for non-consumptive wildlife tourism and what characterises tourists who desire wildlife encounters during their holidays.

The profile of wildlife tourists is generally thought to include:

- They are likely to stay longer,
- Visit more regions than other tourists and visit regions outside the international gateways;
- They have lower daily expenditures but higher overall expenditures because of their longer stays;
- They tend to be from Europe, Japan and Korea, be younger and are more likely to be travelling as couples or with friends and;
- They were more likely to want to see iconic marsupials (kangaroo and koala), while visitors on a return visit were more likely to want to see other types of animals.

The characteristics of the domestic wildlife tourists were compared with those of non-wildlife tourists and only a few demographic differences were found. The majority of encounters with wildlife were in national parks (44.3%) or in other natural settings (12.9%), with smaller proportions of visitors encountering wildlife in captive exhibits such as zoos (17.1%), wildlife parks (12.4%), theme parks (3.3%) and aquariums (2.4%). Wildlife and non-wildlife tourists were asked about their attitudes towards animals and also the environment more broadly. Wildlife tourists had slightly more positive orientations than those who had not had a wildlife encounter.

In terms of international visitors, 18.4% of visitors were influenced to come to Australia to experience native animals. And 67.5% of tourists wanted to see animals during their visit, and 71.1% actually did see animals during their visit. More visitors wanted to see kangaroos (43.2%) and koalas (44%) than other animals, and little mention was given to any others with the next most desired animal encounter being with the wombat (4.4%). Research suggests there is a high level of interest for wildlife tourism experiences. Key considerations for Mon Repos include:

- 51% said that opportunity to view wildlife is included as part of their travel decisions.
- 20% said that the opportunity to view wildlife is one of the most important factors in their travel decisions. These visitors were more likely to be Asian or North American.
- Seeing wildlife in its natural environment, seeing wildlife behaving naturally and seeing rare, unique or unusual wildlife were the three most important features sought in a wildlife tourism experience. Being able to touch/handle wildlife was least important.
The importance of interpretation was reflected in visitors’ suggestions for improvement. Importantly the study also found that a strong positive correlation exists between how much visitors learn about animals and their overall satisfaction.

The wildlife visitors were expecting or hoping to see differed greatly depending on the type of setting, however, there were preferences for large, cute and furry and non-threatening species. Similarly, when asked of the most memorable animal, visitors provided a mix of very different animals, but again highlighting the importance of ‘cute and cuddly’ and size.

Factors contributing to satisfaction with a wildlife experience included how much the visitor felt they learnt about wildlife and visitor ratings of the excitement and naturalness of the encounter.

6.4. Competitor Assessment

Connectors also form the base of existing visitation to this region. The following extract from TEQ Connector Segment Fact Sheet (available from www.tq.com.au) demonstrates the alignment of Connectors and Queensland. While Bundaberg North Burnett is not a top 5 destination, Mon Repos aligns strongly with their holiday demands and desires.

Table 6.3: How Connectors Rank Queensland’s Competitive Set

<table>
<thead>
<tr>
<th>Australian Average</th>
<th>Connectors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top 5 Favorites</td>
<td></td>
</tr>
<tr>
<td>1. Queensland</td>
<td>1. Queensland</td>
</tr>
<tr>
<td>2. Gold Coast</td>
<td>2. Sunshine Coast</td>
</tr>
<tr>
<td>3. Tropical North QLD</td>
<td>3. Gold Coast</td>
</tr>
<tr>
<td>4. New Zealand</td>
<td>4. Tropical North QLD</td>
</tr>
<tr>
<td>5. Europe</td>
<td>5. New Zealand</td>
</tr>
<tr>
<td>Top 5 Places in Australia Visited in the Last Year</td>
<td></td>
</tr>
<tr>
<td>1. Queensland</td>
<td>1. Queensland</td>
</tr>
<tr>
<td>2. Gold Coast</td>
<td>2. Gold Coast</td>
</tr>
<tr>
<td>4. Sunshine Coast</td>
<td>4. Sunshine Coast</td>
</tr>
<tr>
<td>5. Northern NSW</td>
<td>5. Northern NSW</td>
</tr>
</tbody>
</table>

The above assessment has not been completed by TEQ for Active Explorers or Experience Seekers.

6.4.1. Product Competition

The following competitive assessment is designed to explore the competitive environment for Mon Repos in the following markets:

1) Voluntourism;
2) Drive Tourism (Domestic and International); and
3) Wildlife Tourism.

The study will not capture every competitor but is designed to identify potential opportunities for Mon Repos.

Table 6.4: Product Competition Analysis

<table>
<thead>
<tr>
<th>Market</th>
<th>Competitor</th>
<th>Product</th>
<th>USP</th>
<th>Location</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism</td>
<td>Whale Watching Tours</td>
<td>Full Day Trips</td>
<td>Up close encounters with wildlife (whales)</td>
<td>Hervey Bay</td>
<td>Off season for Mon Repos turtle encounter, however may be a substitute product to the proposed all year Mon Repos experience</td>
</tr>
<tr>
<td></td>
<td>(various)</td>
<td>Whale focused July - October</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Fraser Island Tours</td>
<td>Island</td>
<td>Island Adventure</td>
<td>Fraser Island</td>
<td>A more general tourism adventure and not seen as direct substitution to Mon Repos</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4WD Wildlife Beach Dive</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Lady Musgrave Barrier</td>
<td>Fishing</td>
<td></td>
<td>Town of 1770 (1.5 hrs north Bundaberg)</td>
<td>With turtles not a focus unlikely to be a substitute for Mon Repos</td>
</tr>
<tr>
<td></td>
<td>Reef Tours</td>
<td>Sand and sun Reef experiences</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Surfing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Wildlife / Whales</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Bundaberg Attractions</td>
<td>A variety of local attractions</td>
<td>Specialist</td>
<td>Bundaberg</td>
<td>Non competitive</td>
</tr>
<tr>
<td></td>
<td></td>
<td>such as Aviation Collections,</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Distilleries and Tours</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turtle Tourism</td>
<td>Lady Elliott Island</td>
<td>Diving and snorkeling Eco</td>
<td>Island escape</td>
<td>30 minute flight from Bundaberg</td>
<td>Seen as complementary to Mon Repos</td>
</tr>
<tr>
<td>(local)</td>
<td></td>
<td>Accommodation / Resort Turtles</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Island</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Voluntourism</td>
<td>Global Operations</td>
<td>Various turtle and wildlife</td>
<td>Saving our wildlife</td>
<td>Global</td>
<td>Seen as direct competition to the Voluntourism offering at Mon Repos</td>
</tr>
<tr>
<td></td>
<td></td>
<td>voluntourism Centre’s around the world</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Local attractions are not viewed as substitution products for Mon Repos given the vastly different nature of experience.

Global Voluntourism offerings are seen as a direct threat for the pure wildlife volunteer, however Mon Repos will still attract many visitors to Australia who wish to engage as a volunteer while on an extended holiday.

6.5. Market Attractiveness

The following table assesses the attractiveness of each potential market against business criteria such as market size, yield, product alignment and competition (with 5 being very attractive to Mon Repos):

Table 6.5: Market Analysis Against Business Criteria

<table>
<thead>
<tr>
<th>Market</th>
<th>Market Size</th>
<th>Yield</th>
<th>Product Alignment</th>
<th>Competition</th>
<th>Total</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Drive Tourism</td>
<td>5</td>
<td>4</td>
<td>5</td>
<td>3</td>
<td>17</td>
<td>1</td>
</tr>
<tr>
<td>International Drive Tourism</td>
<td>2</td>
<td>4</td>
<td>5</td>
<td>1</td>
<td>13</td>
<td>4</td>
</tr>
<tr>
<td>Research &amp; Voluntourism</td>
<td>1</td>
<td>5</td>
<td>5</td>
<td>3</td>
<td>14</td>
<td>3</td>
</tr>
<tr>
<td>Wildlife Tourism</td>
<td>2.5</td>
<td>5</td>
<td>5</td>
<td>4</td>
<td>16.5</td>
<td>2</td>
</tr>
</tbody>
</table>

The above assessment defines the top 3 markets in order of attractiveness for Mon Repos as:

1) Domestic Drive Tourism;
2) Wildlife Tourism; and
3) Voluntourism.

All markets have potential for Mon Repos.

6.6. Target Products and Markets

The Bundaberg North Burnett tourism region targets the following markets:

Table 6.6: Target Markets for Bundaberg Region

<table>
<thead>
<tr>
<th>Tier 1</th>
<th>Tier 2</th>
<th>Tier 3</th>
<th>New and Developing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connectors in Regional Queensland and Brisbane (400km radius of Bundaberg including South East Queensland)</td>
<td>Social Fun-Seekers and Active Explorers in Sydney and Melbourne New Zealand, United Kingdom and North America, promoted as Southern Great Barrier Reef</td>
<td>Europe, promoted as Southern Great Barrier Reef</td>
<td>China, promoted as Southern Great Barrier Reef</td>
</tr>
</tbody>
</table>
6.6.1. Connectors (Domestic)

Connectors are often described as friendly, down-to-earth and easy going. They are caring and responsible. Day-to-day their lives are quite busy; they like to be supportive and often balance a number of commitments on top of their everyday responsibilities (e.g. work, study or home responsibilities). They are social and relish sharing time with loved ones – it is the sense of togetherness that they enjoy most.

Connectors represent 32% of Australian the population: It is estimated that:
- 790,000 live in Sydney;
- 820,000 live in Melbourne;
- 420,000 live in Brisbane; and
- 500,000 live in regional Queensland.

They consist of a mix of genders and ages:
- 21% under 35 years;
- 34% 35 to 49 years; and
- 45% over 50 years.

They consist mostly of couples and families:
- 18% couples, no children;
- 35% couples, with children; and
- 15% couples, children left home.

6.6.2. Active Explorers (Domestic)

Holidays are about pushing boundaries through challenging themselves via physical activity. They enjoy the company of others, but their focus is on exploring the extremes of their physical environment and themselves. It’s about feeling alive. Key characteristics of this segment can be summarised as follows:

- Likely to drive to a destination, sometimes taking a caravan;
- Will fly but prefer to avoid hassle of airports;
- Most likely to visit multiple locations during their holidays;
- Like to get away from usual hustle and bustle, while at the same time meeting/mixing with other travellers/locals in a natural and authentic;
- More open to staying in backpacker hostels, eco lodge resorts and/or camping;
- Like to get away from TV, people and daily routine and stay at accommodation set amongst an untouched environment;
- Love physical activity; and
- More to full eco-tourism experience.

6.6.3. Experience Seekers (International)

A core element of Tourism Australia’s 2020 strategy is to target a high yielding consumer segment. Tourism Australia has identified common segments across different cultures that would be receptive to the Australian experience and called them the Experience Seeker. This target market is highly predisposed to Australia’s offer and is more likely to stay longer, spend more and disperse to regional areas.

Experience Seekers are, by definition, looking for unique, involving and personal experiences from their holidays. Using psychographic research, studies find how travellers think and feel to determine the personal factors that influence them to travel. Experience Seekers are long haul travellers who are less affected by the traditional barriers to travel of distance, time and cost. They are more informed, interested and curious about potential travel destinations. They constitute around 30 to 50 per cent of all potential long haul outbound travellers from our key source markets.

Experience Seekers can be found among all age groups, income levels and geographic locations. In each of Tourism Australia’s markets around the world, the Experience Seeker profile is refined and the best segment targeted.

Research has shown that the Experience Seeker has a number of key ‘wants’ to satisfy their travel experience:
- Authentic personal experiences;
- Social interactions;
- Meeting and interacting with the locals;
- Experiencing something different from their normal day-to-day life;
- Understanding and learning about different lifestyles and cultures;
- Participating in the lifestyle and experiencing it, rather than observing it;
- Challenging themselves – physically, emotionally and/or mentally;
- Visiting authentic destinations that are not necessarily part of the tourist route; and
- Exposure to unique and compelling experiences.

Source: www.tourism.australia.com/markets/the-experience-seeker.aspx
7. INTERPRETATIVE EXPERIENCE AUDIT

7.1. Introduction

A high level interpretive strategy will provide the foundation for the conceptualisation of the visitor’s experience. Thematic interpretation is a best practice approach to interpretation. It uses strong messages, or themes, that aim to enhance the visitor experience by assisting them to gain a sense of the significance and the meaning of their experience. It is a more powerful form of interpretation than simply presenting topics or unrelated facts, no matter how interesting these may seem. People forget facts, they remember the ‘so what’ or the moral to the story’ that a theme represents.

Thematic interpretation has been proven to be highly effective in holding visitor attention and in making the experience memorable — and one that they will be enthusiastically recommend to others.

Integration of the core elements of the project ensures the authenticity of the products and helps in establishing a strong visitor connection to place. Such a connection assists business outcomes by generating a desire to spend. The interpretive framework and design concepts will, therefore, address community aspirations and market needs whilst leveraging opportunities for the community at the site and across the region. This involves the identification of appropriate interpretive concepts and media to highlight the key themes.

For the purpose of evaluating the interpretive opportunities at Mon Repos, this assessment will use the best practice thematic interpretation principles (E.O.R.T) developed by Professor Sam Ham of the University of Idaho. Simply put, an interpretive experience will be most effective at reaching audience if it is:

- Enjoyable;
- Relevant;
- Organised; and
- Thematic (ERO.T).

This overview captures:

- An initial assessment of Mon Repos against these principles;
- A suggested over-riding core message (theme); and
- Recommendations for advancement of the experience.

<table>
<thead>
<tr>
<th>ENJOYABLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>The experience is intimate and all about the turtles, with a high sense of expectation and natural engagement.</td>
</tr>
<tr>
<td>An all evening experience with infrastructure resource available space etc. for multiple levels of the evening experience.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Strengths</th>
</tr>
</thead>
<tbody>
<tr>
<td>The face-to-face aspect of the interpretation is high with connection to the passionate, knowledgeable Rangers and Volunteers. The opportunity to engage in conversation, interaction creates a solid platform for quality visitor experience.</td>
</tr>
<tr>
<td>Visitors can currently participate in special activities eg. Egg relocation, touch the eggs, ultra sounding (mobile screen), attaching tracking units, turtles back from the lab, hatchlings into cage then release into tunnel of light to the water, weigh and measure eggs in lab.</td>
</tr>
<tr>
<td>The site presents as intimate and friendly, the orange glow from lights sets a tranquil relaxing mood.</td>
</tr>
<tr>
<td>The anticipation of something ‘magical’ about to occur creates a wonderful sense of excitement and awe.</td>
</tr>
<tr>
<td>The static aspects of the experience provide good information accessible to multiple age levels.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple opportunities exist to improve the overall enjoyment of the experience, many already identified by the current Rangers and Volunteers. More comfortable, higher quality infrastructure will improve the visitors ability to connect and engage with interpretation. The dated interpretation centre has high levels of didactic information and would benefit from a entirely new re-fit to bring the interpretation into a modern era.</td>
</tr>
<tr>
<td>Simply put: The enjoyment factor pre-turtle experience will rise significantly with higher quality Interpretive methodology and infrastructure to support a focused interpretive strategic approach.</td>
</tr>
<tr>
<td>The Face-to-face turtle viewing is world class! Opportunity exists to explore methods of reducing numbers on tour, value adding to the experience through additional engagement in activities and a focus on developing a ‘personalised’ experience through involvement in additional activities.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>How people interact with an experience is entirely personal and individual, however there are some factors that are common and have impact on the audiences willingness to engage with interpretation.</td>
</tr>
<tr>
<td>Often the term ‘time-poor’ will be at the fore-front of reducing the visitors engagement and the current waiting periods of upwards of 4 hours and late into the evening, will have impact of the receptiveness of the visitor.</td>
</tr>
<tr>
<td>This can be balanced and reduced through various methods (see Opportunities).</td>
</tr>
<tr>
<td>Currently there is a lack of engagement during this time &amp; space, the non face-to-face activities (signage) are dated or of a minimal standard and do not provide sufficient interaction to enhance the product.</td>
</tr>
<tr>
<td>Comfort levels currently provided by the site are recognised as being of a minimal standard.</td>
</tr>
</tbody>
</table>

The current visitor experience has evolved as a response to public desire and is currently running at a capped volume of 300 pax a night. Human resources are stretched at this capacity and assistance is required from a crew of volunteers to manage the audience levels. It is clear from interviews; site visits and research that the expectation levels for the experience are easily achieved, in fact eclipsed, upon the viewing of the natural phenomenon taking place. This experience is rich in interpretive opportunity, a great deal already being achieved by Rangers and volunteers and with some exploration of product design, the site will be a significant world class attraction and a leading example of best practice environmental stewardship.
The experience is intimate and all about the turtles, with a high sense of expectation and natural engagement.

An all evening experience with infrastructure resource available space etc. for multiple levels of the evening experience.

Rain creates a difficult environment due to lack of shelter, humidity can be high, mosquitoes often a problem and seating viewing areas are hard to sit/stand on for extended periods. Other general challenges created by the natural environment can contribute to an ‘erosion’ of the visitors enjoyment. Combine these environmental and infrastructure factors with low food & beverage standards and the visitors experience outside of the actual turtle viewing is at a minimal level for satisfaction. During interviews the estimate of 15% of pax leave before the turtle viewing and many parents bring ipads and sleeping bags for children to occupy them.

The face-to-face turtle viewing and activities are of a high caliber, however it is acknowledged by all that the max group size of 60pax does have an impact on the audiences perceived enjoyment. Desire by individuals to feel more ‘personally treated’ reduce the enjoyment factor dramatically as numbers on tours increase.

**RELEVANT**

The relevance of an experience to an individual is a subjective viewpoint, we are, after all, individual. What we do know is that there are certain elements of all of us that are the same and as a result the measure of relevance is based on those universal aspects. Emotive responses to experiences are connected to the core of humanity, family, passion, love, grief, compassion etc. The second aspect of capturing the relevant aspects in interpretation is far more obvious, as an example, this experience is ALL about the turtles, not about the entire marine environment. Simply put we address the most physically relevant ingredients first.

**Strengths**

The encounter with these creatures is something that people recall and express as a once in a lifetime experience.

There is extremely high connection to the personal feelings of: life being created, arduous journeys being undertaken, danger, fragility, vulnerability the list is extensive and powerful.

The direct connections to science and the environment tap the growing awareness of a modern audience made more relevant through the opportunity to participate.

The parallels that exist between the human efforts and that of the turtles efforts further re-enforce this.

The additional external programs are to be commended ‘cut the glow’ brings the entire community into the experience of acting as responsible environmental citizens.

**Opportunities**

The recommendations of the concept master plan will provide a platform for the redevelopment and application of more engaging and meaningful interpretive material and experiences. A opportunity exists, during the redevelopment, to create a focused interpretive strategy. From this strategy would come clear direction and method to enhance the audiences connection to the many relevant elements of the experience.

A dedicated Interpretive strategy would assist the induction of new guides and volunteers and provide a template for the development and sharing of content and methods.

**Weaknesses**

The face-to-face experience has very few weaknesses, if they are present it would only be in the form of guide or volunteers in-consistency in bringing them to the attention of the audience. Without experiencing multiple guides’ styles and lack of experience of new volunteers it is not possible to make an accurate statement on the delivery.

The current form of interpretive material is highly fact driven in an educational format, whilst all interpretation contains information, information itself is not a best practice method for reaching a non-captive audience.

The experience is intimate and all about the turtles, with a high sense of expectation and natural engagement.

An all evening experience with infrastructure resource available space etc. for multiple levels of the evening experience.
Information, ideas, concepts, images, themes, are all processed by using different ways. We do know from research that we assemble these inputs in specific ways. A disorganised visitor experience causes a non-captive audience to ignore or reject the interpretation because the core messages get lost in the random information bytes.

Strengths
The actual site is well located, has potential for varied layers of interpretive experiences and the available research and supporting documentation is vast.

Opportunities
With the redevelopment of the site and experience, a key opportunity exists to review the methods practices and styles of the Interpretation. The opportunity exists to restructure how interpretation is delivered, media methods and styles and additionally how the visitor ‘enters into’ the entire experience.

There are opportunities for expanded activities and behind the scenes interpretation and for more dedicated types of Interpretive activities.

Weaknesses
The organisation of the experience is currently its greatest weakness.

This is not a reflection on the individuals in the organisation but on the perception of the audience in relation to the entire experience. Growing from the need to respond to demand and yet continue to hold to the core drivers of conservation, has created a product that has been added in a reactive manner as the visitor environment has changed without, it seems, overarching strategy, planning and design.

Limited human resource, dated infrastructure and reactionary development have caused the experience to develop in a way that it is now disjointed and creates interpretive ‘silos’ rather than audience flow.

THEMATIC
People forget individual facts and figures but they remember ‘whole ideas’. The core to thematic interpretation is to create a long term lasting memory, one that will be shared and discussed as the audience member moves on.

7.2. Master and Sub-themes for Interpretation

Brand positioning versus Master Theme
It is important to distinguish between the two components in the initial Concept Master Plan. Brand position is what attracts our target audience to the site. In this case a personal encounter with an iconic wildlife. The brand position is outlined in Section 9. The theme is what we want visitors to take away with them. This is the deeper layer of experience (See Figure 7.2 and Box 4 on following page). The theme has the potential to influence people’s views and attitudes towards turtles, conservation, national parks and our own natural environment.

The Master and Sub-themes were developed through a workshop process with the project steering committee and site reference group to identify the key experiences sought by target customers and the overlapping themes between these experiences. The outcome of this process is shown in Figure 7.2 and section 7.2.1.
7.2.1. Master Theme for Mon Repos

Be part of the commencement and culmination of a unique creature’s life long trials and journey

7.2.2. Sub-themes for Mon Repos

Sub-theme 1: You come to this special place as a witness you leave as part of the story.

Sub-theme 2: Working or observing you can make a difference.

Sub-theme 3: This is not just a science story. Magical and enchanting the experience will stay with you for a lifetime.

7.2.3. Next Steps

Next steps for advancing the master theme e of the site would involve developing and implementing a Thematic Interpretation strategy in line with current interpretive strategies and NPRSR brand positioning. This strategy would be developed in collaboration with stakeholder such as the Rangers and would be informed by an audit of current research, materials and media.

Box 4: Hypothetical of a Connectors’ Experience of Mon Repos

We arrive at Mon Repos in the evening to gentle orange lights hushed voices and an air of anticipation. It was refreshing to realise that the Visitor Centre was not some overly commercialised tourism attraction; it’s a working marine turtle sanctuary and hatching nursery.

Arriving we had a simple yet delicious meal by lantern light, nothing pretentious, nice quality, “camp-style” fare. Then our small group was led into the research facility. This was exceptional, not signs stuck to walls, or dumbed down touch screen games. We were able to watch and quietly chat with the lead researcher and scientists whilst they performed a number of checks and tasks on the hatching turtles. The researchers were really fantastic with the kids even letting them help with a few things, but no matter what, you always had the sense that you were the secondary part of the experience, and that was OK.

We were then shown to the amphitheatre and with the use of low level orange lights and some simple theatre ‘trickery’ the indigenous connection to the turtles is brought to us. The tale is played out in almost darkness without a sound, it’s a beautiful contrast to the science yet still embraces the human involvement.

Sometime later it’s our time to head to the beach, our turtle has arrived, we are so excited. We opted for a personalised tour option and were able to assist with an egg relocation with the ranger. A must do if you can it was very personal and the ranger was extremely interesting and we got to hold and carry the precious cargo to a safer location, record the clutch numbers and test the temperature of the nest.

To not only see but be able to touch and engage with a creature that has made such an extraordinary voyage to deliver a precious cargo will be with me forever. An entire evening immersed in a turtles’ world, on their timeframe, amazing.

We were able to collect a matching tag for our turtle, ‘adopt’ the clutch we had moved and once they hatch we will receive photos of our little guys (or girls) that we relocated to safety.

Hard to summarise the connection to this place, it’s really a once in a life time experience.

John Smith, 15 December 2016
8. EXISTING BUSINESS ANALYSIS

8.1. Need for new Business Models

NPRSR is embarking on an exciting journey to improve access to Queensland’s protected areas to provide the general public and visitors with a stronger understanding and appreciation of the role and value of these areas. This will require a number of changes to be adopted within the organisation including the need to consider new business models that maintain the conservation values of protected areas whilst also providing new services. These new business models also need to generate and capture additional value and income to allow further investment in the restoration, conservation and improvement of these vital community assets.

The purpose of the business model analysis is to:

☑ Establish a theoretical ‘baseline’ business model for the existing operations of Mon Repos assuming that the Visitor Centre is an independent business. These will be used for comparison purposes when developing a business model for the new centre.

☑ Identify relevant critical success factors that should be considered in the planning, design and development of Mon Repos Conservation Park from the experiences of a select number of other relevant eco-tourism projects.

The theoretical baseline business model used for this project will be developed using the Business Model Canvas, developed by Osterwalder & Pigneur, 2010. The Business Model Canvas is a useful tool as it provides multiple stakeholders the ability to view and intuitively understand the critical components associated with developing a successful business model. This model has been adopted by a number of leading businesses and organisations and the approach is illustrated in Figure 8.1 below:

There are nine key components to this business model, which are summarised as follows:

1) Customer segments – obtaining clarity on the different groups of people and organisations that need to be served by the product and/or service provided.

2) Value Proposition (VP) – how and what customer problems and needs are being satisfied and how will the customers receive value from this product and/or service.

3) Channels – How the VPs are being delivered to the customers through communication, distribution and sales channels.

4) Customer Relationships – How to establish and maintain relationships with each customer segment.

5) Revenue Streams – The financial income that is estimated to result from the successful delivery of the VP that has been provided to its customers.

6) Key Resources – The key assets required to offer and deliver the products and/or services.

7) Key Activities – That need to be performed by the Key Resources.

8) Key Partnerships – That are required to be established to undertake some of the activities that will be outsourced or undertaken by others e.g. volunteers, suppliers, out-sourced activities including catering etc.

8) Cost Structure – the costs associated with delivering the services and/or products associated with the business model.

Figure 8.1: Business Model Canvas - Osterwalder & Pigneur, 2010

Furthermore, during the development of the business model an assessment will also be included on the institutional and governance arrangements that will be required to support the successful delivery of the business models.

8.2. Overview and Assessment of Current Business Models

The business model canvas highlighted above has been used as a framework to undertake a strategic review of the existing Mon Repos business model. The purpose of the review was to establish a theoretical ‘baseline’ business model for the existing operations of the centre assuming that it was operated as an independent commercial business. This will be used for comparison purposes only when developing the business models for the preferred concept master plan. It is recognised that due to the current organisational arrangements and drivers within NPRSR that Mon Repos is not currently structured to be primarily focused on profitability as a key operating objective. This review has largely been undertaken as a ‘desktop’ exercise. The key relevant items identified in the strategic assessment are discussed below:

8.3. Mon Repos - Current Business Model Analysis

Mon Repos receives on average 30,000 paid visitors who participate in the guided tours between November and March each year (noting for operational purposes this season is referred to as October – April). Outside of the turtle breeding season there are additional visitors but these figures are not recorded as there are not any revenue generating opportunities on-site at this time. The ticket pricing is established in regulation and an inflexible model has been historically used to date. Income from ticket and merchandise sales is treated as consolidated revenue. The timing of the establishment of the ticket pricing does not currently align with the timeframes required by the tourism industry for promotion at the major industry forums.
The current customer segments and value proposition has been articulated in the Market Analysis in section 7 of the report and a summary is provided below.

8.3.1. Customer segments

The key existing customer markets for the visitor centre is:

- Drive tourism, which consists of 75% families, 20% grey nomads and 5% other.

The key customer segments are:

- Connectors;
- Active Explorers;
- Wildlife Enthusiasts; and
- Voluntourists

The majority of current visitors live within a 400 km radius of Bundaberg.

8.3.2. Value Proposition (VP)

The VP offered for the current centre is summarised as follows:

- Up close, personal and highly memorable marine turtle experience provided at exceptional value.

8.3.3. Channels & Customer Relationships

The strategy currently used to engage and maintain a relationship with potential target markets is limited as NPRSR does not appear to allocate resources directly to pro-actively promoting and engaging with the target market. However, since 2011-12 marketing and promotion of the centre has been undertaken by Bundaberg North Burnett Tourism with financial support from Tourism and Events Queensland. This appears to positively correlate with the centre receiving the highest number of visitors since 2004/05. The other key channel for marketing appears to be word of mouth referrals.

Due to the unique turtle experience on offer at Mon Repos it is recommended that additional resources should be allocated to developing a closer and on-going relationship with potential target markets. This should focus on increasing revenue, support and providing a vehicle to distribute key messages related to the on-going conservation and research programs being undertaken at Mon Repos.

8.3.4. Revenue Streams & Cost Structures

The Mon Repos Conservation Centre is not currently structured to be primarily focussed on commercial sustainability as a key goal. However, to establish a relevant baseline it has been important to undertake a review of the existing financial information available for the centre to understand the current cost structures and revenues. The analysis undertaken as part of this planning process indicates that the Mon Repos Centre is estimated to operate at a loss and that there are a number of key actions that could be taken to provide a better return to the State for its operation.

8.3.5. Key Resources

The key assets required to offer and deliver the customer experience include the turtles, beach, building assets, natural setting, amphitheatre, gift and interpretive centre and NPRSR Rangers.

The marine turtles that currently nest at Mon Repos are under significant threat and this needs to be a key consideration in the development of any new business model for Mon Repos (see Section 6 of this report).

8.3.6. Key Partnerships

The following summarise the key partnerships that exist to operate the current centre:

- 35-40 volunteers who assist the rangers and researchers with conservation, education, turtle research and visitor management, as well as providing a vital link between NPRSR and the community. The volunteers donated 2276 hours in total in the 2012-13 season and 3509 hours in 2011-12. The volunteers provided approximately 30% fewer hours in the 2012-13 season due to the adverse weather conditions faced that shortened the season.
- QLD Turtle Research Program – undertakes research in partnership with the rangers
- Contractual arrangement with Bundaberg North Burnett Tourism who act as the turtle-viewing booking agent.
- Bundaberg North Burnett Tourism and Tourism & Events Queensland undertake promotion and marketing.
- On-site food van has short term contract to provide food and beverages during turtle viewing season. This arrangement will be reviewed post 2012/13 season.
- Cut the Glow to help Turtles Go - Successful ongoing community campaign led by the Rangers to address artificial light glow affecting nesting and hatching turtles along the Woongarra coast and to promote community connections to this natural attraction.

8.4. Benchmark Analysis to Identify Future Critical Success Factors

As part of developing the concept master plan for Mon Repos a benchmarking exercise was undertaken which involved undertaking interviews with a number of eco-tourism operators highlighted below:

- Ningaloo Turtle Program – The Cape Conservation Group, the Department of Parks and Wildlife, Murdoch University and WWF Australia have developed the Ningaloo Turtle Program to contribute to the conservation of marine turtles and their associated habitats.
- Save Our Seas – In 2000 Paul Barnes and Jennie Gilbert established the Cairns Turtle Rehabilitation Centre in Cairns, a non-profit organisation.
- Reef HQ – Reef HQ is the National Reef Education Centre for the Great Barrier Reef Marine Park Authority.
- Mossman Gorge Centre, Qld – The centre is the Gateway to Mossman Gorge. Voyages Indigenous Tourism Australia is fully owned by the Indigenous Land Corporation (ILC) who operate Mossman, Uluru and other centres (http://www.mossmangorge.com.au/).
- Tasmanian Tourism Entrepreneur – responsible for developing Cradle Mountain Lodge, The Strahan Village and Gordon River Cruises
- Phillip Island Nature Park (previous CEO) – responsible for the conservation and management of 1805 hectares with high conservation values, four key tourism experiences and an extensive research program. PINK is a self-funding government owned commercial attraction, operating under an independent board.
The purpose of the interviews were to identify a series of critical success factors (CSFs) that are common to successful eco-tourism enterprises that are located on or adjacent to National Parks & Wildlife Sites throughout Australia. The intent is that these CSF’s are considered by NPRSR in the on-going planning and development of the Mon Repos master planning project.

8.5. Current Business Model – Key Observations

Based on the above assessment, the following key observations are made in relation to the current operating model at Mon Repos and the development of a new business model:

- The visitor centre does not appear to be currently financially sustainable as an independent operation, however further analysis is required by NPRSR to confirm the actual operating position of the centre. This will allow informed decisions to be made in the development of the business model for the preferred concept design;
- Mon Repos is currently operating at full capacity during the turtle hatching season with limited but targeted marketing and promotion of the centre. The entry fee is inexpensive and establishing a fee that is a better representation of the value of the product and informed by other similar tourism products would be a straightforward option to increase revenue to allow the recruitment of additional staff or invest in new infrastructure, conservation or research programs. However, it is recommended that any significant increase in ticket pricing be hypothecated to the operation of the centre and conservation of the turtles. There are many examples where this strategy around ticket pricing has been effective;
- Mon Repos is heavily reliant on volunteers and key partners to support the operation of the centre and the volunteers, turtle researchers and rangers are a key part of the visitor experience, which needs to be maintained and strengthened;
- An all year round tourism experience is required – additional staffing and infrastructure requirements are essential in achieving this goal;
- A marketing strategy will be required to support on-going engagement with the new Customers Segments and delivery of the Value Propositions. Additional resources will need to be allocated for this purpose;
- Establishing the ticket pricing needs to align with the timing required by the key tourism industry promotion events;
- The Visitor Centre needs to be more entrepreneurially focussed (profit for purpose) and to be able to respond to and identify commercial opportunities that align with the NPRSR brand and create win-win benefits that will increase revenue to the centre; and
- The governance structure needs to allow the capture of all or a significant component of the revenue to re-invest in the Visitor Centre.
9. COMPETITIVE POSITION AND BRAND

9.1. Introduction

The following section of the report outlines the outline brand positioning that would be associated with Mon Repo.

9.2. Destination Brand Positioning

As outlined in the Bundaberg North Burnett Destination Strategic Plan 2011-2016:

- Embed the turtle conservation experience in all marketing activity
- The Bundaberg and North Burnett region will also be collectively promoted under the creative framework of Brand Queensland - a strategy that ensures Queensland's destinations and experiences are positioned in a way that focuses on competitive advantages and connects with visitors. A cornerstone of the Brand Queensland strategy is four key experience themes: Queensland Lifestyle; Islands and Beaches; Natural Encounters; and Adventure. The key attributes and selling points of the Bundaberg North Burnett region will be showcased via all four of these experience themes.
- The Bundaberg North Burnett region will be collectively promoted under the umbrella of Southern Great Barrier Reef in partnership with the Capricorn and Gladstone regions.
- The Bundaberg North Burnett region will take ownership of its share of the Southern Great Barrier Reef through the key experiences of Lady Elliot Island, Mon Repos Turtle Rookery, and seaside holiday villages including Bargara, Woodgate and Moore Park.

9.3. Bundaberg North Burnett Hero Experiences

The following defines TEQ hero experiences for Bundaberg region:

Figure 9.3: Bundaberg Hero Experiences (source: Destination Brisbane Hero Experience)

9.4. Mon Repos Brand Positioning

The following brand strategy and positioning is designed to define Mon Repos place in the market and connection with priority visitors.

9.4.1. Brand Elements

The following brand pyramid captures proposed brand elements for Mon Repos:
9.4.2. Brand Positioning

“The Mon Repos Turtle Encounter will be famous as the world’s ‘best practice’ turtle experience and turtle conservation movement.”

This positioning is purposefully tightly focused around the turtles. Other elements may become part of the visitor experience but the brand should be known for its world-class turtle encounters first and foremost.

9.4.3. Value Propositions

The following table describes the value propositions for recreational, tourism and team building perspectives for Mon Repos:

Table 9.4a: Value Proposition for Target Markets

<table>
<thead>
<tr>
<th>Tourism</th>
<th>Voluntourism</th>
<th>Research Partners</th>
</tr>
</thead>
<tbody>
<tr>
<td>For Australian and International holiday travellers seeking a world-class wildlife encounter ... Mon Repos offers a chance to learn and participate in the turtle conservation efforts at Mon Repos... leaving you feeling uplifted, privileged and informed.</td>
<td>For holiday volunteers looking to immerse themselves in a turtle conservation movement ... Mon Repos offers a chance to live and breathe behind the scenes in the turtle conservation efforts at Mon Repos... leaving you feeling uplifted, privileged and informed.</td>
<td>For research partners looking to partner in a turtle conservation movement ... Mon Repos offers a chance to index, measure, research and gain insight into the life long journeys and challenges experienced by this unique sea creature.</td>
</tr>
</tbody>
</table>

9.4.4. Essence Expanded

The essence ‘conservation in motion’ is designed to ground the Mon Repos experience in its conservation efforts. It implies the visitor experience supports and participates in the researchers and volunteers crusade to understand, assist and protect the visiting and born turtles at Mon Repos.
9.4.5. Brand Name

This Brand Strategy recommends a re-naming of the Mon Repos Visitor Centre based on four key inputs:

1) Parks and Wildlife new brand strategy;
2) Turtle conservation and the encounter with turtles experience are key to the site;
3) The ‘turtle’ offering aligns to opportunity across all target markets in voluntourism, connectors and wildlife enthusiasts; and
4) The hero experience for the region is turtles.

It is therefore recommended the brand name be changed from the Mon Repos Visitor Centre to Mon Repos Turtle Centre.

9.4.6. Brand Alignment

The following table summarises the brand alignment message for Mon Repos

Table 9.4b Brand Alignment Message for Mon Repos

<table>
<thead>
<tr>
<th>ALIGN</th>
<th>AVOID</th>
<th>ANTETHISIS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Genuine</td>
<td>Contrived</td>
<td></td>
</tr>
<tr>
<td>Meaningful</td>
<td>Mass Market</td>
<td></td>
</tr>
<tr>
<td>Purposeful</td>
<td>Intrusive</td>
<td>“Show Time”</td>
</tr>
<tr>
<td>Uplifting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participative</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
10. OPPORTUNITY SUMMARY

10.1. Overview

The opportunity summary is drawn from the opportunities identified in the site analysis, market analysis, business review and interpretive audit. Key strengths, weaknesses, threats and opportunities (SWOT) from this process are presented below.

Table 10.1: SWOT Analysis Mon Repos

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>◆ Existing iconic profile and high quality experience</td>
<td>◆ Infrastructure and staffing levels constrained</td>
<td>◆ Marine turtles are experiencing significant threats to their long term survival that are local, regional and global in nature.</td>
</tr>
<tr>
<td>◆ Commitment and expertise of Rangers and Volunteers</td>
<td>◆ Not an all year round experience</td>
<td>◆ Poor development outcomes on Adjoining sites have potential for direct and indirect threats to the rookery.</td>
</tr>
<tr>
<td>◆ World class research program</td>
<td>◆ Lack of all-weather facilities for large groups</td>
<td>◆ Waste handling Facility – detracts from entrance to Centre and attracts predators (foxes)</td>
</tr>
<tr>
<td>◆ Room for growth</td>
<td>◆ Limited car parking</td>
<td></td>
</tr>
<tr>
<td>◆ Product that would strongly appeal to private, public and NGO’s for partnership and investment opportunities</td>
<td>◆ Lack of visitor waiting options</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>◆ Increase entry fees and provide tiered experiences and price structures</td>
<td>◆ Link Research &amp; Visitor Centre - showcase</td>
</tr>
<tr>
<td>◆ Interpretive Centre of Excellence that lives up to the experience</td>
<td>◆ Turtle hatchery component for year round experience</td>
</tr>
<tr>
<td>◆ Increase new high quality entry statement</td>
<td>◆ Integrate accommodation &amp; facilities for researchers &amp; visitors; improve staff facilities</td>
</tr>
<tr>
<td>◆ Explore research and sponsorship partnerships</td>
<td>◆ Opportunities for ‘gateway’ to Southern Great Barrier Reef</td>
</tr>
<tr>
<td>◆ Attract philanthropic investment</td>
<td>◆ Engage with adjoining land owners to achieve win-win outcomes</td>
</tr>
<tr>
<td>◆ Consider alternate governance arrangements to enable re-investment and ownership</td>
<td>◆ Investigate regional sourcing options for retail/food</td>
</tr>
</tbody>
</table>

The SWOT analysis and options workshop held on 6 September 2013 where this was discussed with the project Steering Committee and Reference Groups highlighted that for Mon Repos to achieve its vision of a world’s best practice turtle conservation movement and turtle experience three key element are required:

- A business and governance model where revenue can be reinvested into conservation, research and the centre;
- Re-imagined functionality of the Visitor Centre that provides suitable cover, comfort and amenity during night and day and incorporates the researchers and Rangers facilities into the Centre; and
- Year round experiences provided through an on-site turtle nursery that supports the conservation focus of Mon Repos.

10.2. Business Model and Governance

Central to Mon Repos is the conservation and protection of marine turtles such as the loggerhead, flatback and green turtles. An appropriate business model and governance arrangement for the site would enable additional revenue to be generated for the purposes of conservation but would also provide significant benefits for the region. The types of features required include:

- Increased range of products and increased cost of tailored products;
- Ability to reinvest revenue into the development of the site;
- Ability to secure private or individual sponsorship and donations; and
- Phased approach to public and/or private government investment in the site, with ultimate the aim of cost positive business model.

Figure 10.2a provides an overview of this approach:
10.3. Functionality of Visitor Centre

The current visitor centre requires an extension and upgrade to be positioned as a world class turtle conservation centre. Key considerations include:

1) Increase entry fees and provide tiered experiences and pricing structures.

2) Suitable retail and merchandise space to generate additional revenue. Currently the visitor centre is generating approximately $1 / per person where the industry benchmark is approximately 10:1.

3) Visitor centre is not adequate to cater for maximum group of 300 per night during peak season, particularly in humid weather. Conditions for visitors are cramped and uncomfortable.

4) Food and beverages are inadequate. There is currently no space in the visitor centre to provide food or seating areas while consuming refreshments.

5) Researcher and ranger offices and working space are currently removed from the visitor centre and interpretive and educational experience of the site. New facilities are required including office space and storage and amenities.

6) The entry statement to the site is not adequate with lack of signage.

7) The interpretive experience is compromised in wet or humid weather with the outdoor amphitheatre not being covered or cooling not provided.

8) On-site experiences to reduce potential boredom and discomfort associated with long waiting times for the turtle viewing. Particularly in shoulder season or for later groups in the viewing list.

Figure 10.3 below provides an overview of opportunities associated with the use of the site.
10.4. Year round experiences

The commercial success of Mon Repos is highly dependent on the ability to attract a significant numbers of visitors during the day in peak season and throughout the year. Various ideas were explored to provide this year round draw card.

There is an immediate opportunity to position the Mon Repos Turtle Centre as a gateway visitor centre to the Southern Great Barrier Reef (SGBR). This could create the year round experience for the broader SGBR (but not Mon Repos itself) by linking in with the “great 8” concept which includes turtles at Mon Repos, manta rays of Lady Musgrave and Lady Elliot Island and the whales in Hervey Bay. There is an opportunity for cross selling of tourism attractions of protected species.

In relation to Mon Repos, Dr Col Limpus from DEHP provided the recommendation of incorporating a turtle nursery into the Visitor Centre. In addition, moving the research activities into the heart of the centre has also been recommended. Inclusion of a turtle hatchery within the Visitor Centre and integrated with the research facility provides the ‘hero’ which is proposed to raise the profile of Mon Repos throughout the year. It would also provide a significant advantage in supporting the survival of hatchlings in the short term and enabling researchers to monitor and track these turtles over the long term.

Further investigation is required into the development of a turtle hatching facility at Mon Repos. At this stage it is proposed that approximately 50 hatchings would be kept in the nursery for a period of between 9 to 18 months after which time they could be released at any time throughout the year, tagged and monitored.

Appropriate holding tanks, a seawater source and feeding / monitoring arrangements would need to be in place as well as care of the hatchlings by those trained in animal husbandry, appropriate available veterinary care and ethics approvals.

The proposed turtle nursery provides a number of significant benefits for achieving the vision for Mon Repos. These benefits include:

- All visitors to Mon Repos at any time of year are guaranteed the opportunity to view a marine turtle and learn more about this species as well as the threats and challenges facing its long term survival;
- Volunteers, researchers and voluntourists can participate in running guided tours for viewing of the turtle nursery encouraging community involvement and ownership of the experience;
- A range of tourism products can be developed around the viewing of the turtles covering experiences such as the viewing, discussions with the researchers, assistance with measuring and indexing and assistance with releasing the turtles to the ocean; and

Tagging and monitoring of the hatchlings once released will also provide a significant benefit to the research at the Centre.

Source: NPRSR

10.5. Potential Future Staging

The Mon Repos Turtle Centre and associated opportunities would need to be delivered through a staged approach that would be dependent on available State Government funding and potential future private investment.

It is envisioned that a cover for the amphitheatre, new front entry statement to the site, expanded visitor products, positioning as the gateway to SGBR and suitable governance arrangements may represent tangible deliverables for the short term.

In the long term, a new extension to the visitor centre building, comprising the turtle nursery, upgraded staff and research facilities, improved food and beverage facilities, interpretative space and retail / merchandising could be considered. Given the current capacity constraints and impacts on the visitor experience due to weather and lack of refreshments and on-site activities, the Master Plan provides an ideal opportunity to consider directing investment to extending and enhancing the visitor centre to cater for increased year round visitation in the future.

Potential staging of the initial concept Master Plan is described in further detail in Section 14.
11. PROPOSED CONCEPT MASTER PLAN

11.1. Overview

The proposed concept master plan was developed through further refinement and engagement of a range of options that emerged from the initial opportunities summarised in section 10. Workshop participants at the Concept Options Workshop on 5 – 6 November 2013 were presented with a number of master planning options to collectively determine the initial Master Plan concept and potential future staging of planning, design and construction work.

Two main options were discussed at this workshop which included the following features:

- Adaptive reuse of existing built form to the greatest extent;
- Maintaining the two existing beach access paths;
- Moving the researchers facilities from the current location to be re-located within the visitor centre;
- A new interpretative centre;
- A new café and public toilets as well as covered dining area;
- New staff accommodation facilities and toilets;
- Covered access way from the car park into the Visitor Centre;
- Approximately 124 car parking spaces including People With Disability (PWD) spaces provided; and
- Services access for food and beverage and research related services.

The main differences between the options were the layout, adaptive re-use of elements of the visitor centre and access and movement around the site. The preliminary Master Plan concept options presented at the workshop are included in Appendix B.

The concept Master Plan for the Mon Repos Turtle Centre presented in this section is the outcome of a series of consultative workshops with NPRSR and key stakeholders, detailed analysis, development of marketing strategies and the proposition of a new business and governance model to provide NPRSR with a vision for creating a world’s best practice turtle experience and conservation centre.

11.2. Proposed Concept Master Plan

The workshops with the project Steering Committee Reference Group identified that in order to provide NPRSR with a vision for a world class turtle centre that will attract year round visitation; the current shortfalls of the existing facilities in terms of amenity would need to be addressed to provide:

- Amenity for visitors, both physical and experiential;
- Amenity for the researchers and volunteers; and
- Amenity for the QPWS Rangers.

The resulting Concept Master Plan has evolved from a critical analysis of the existing facilities and the common themes and opportunities that have resulted from the workshops, namely:

- The creation of new high quality interpretive display facilities;
- The delivery of greater year round interaction with turtles through the integration of publically accessible Research Facilities within the Centre and the creation of the hatching pools and viewing decks;
- The provision of a covered café/dining area;
- Creation of a range of covered areas/breakout spaces for visitors;
- Refurbishment of and cover over the Amphitheatre;
- New facilities for the QPWS Rangers and the Volunteers;
- Additional car parking and new entry feature on Mon Repos Road; and
- A new commercial accommodation offer on site – ‘Glamping’.

It was also recognised that the Mon Repos Turtle Centre and associated opportunities would need to be delivered through a staged approach that would be dependent on available State Government funding and potential future private investment.

11.3. Elements of the Proposed Concept Master Plan

The proposed layout of the Mon Repos Turtle Centre is presented in Figures 11.3a-i. The concept design has resulted in a series of pavilions that stack behind the existing Visitor Centre to minimise the extent of beach frontage, environmental disturbance and rule out the potential for light spill. These pavilions follow the visitor experiences of: arrival → marshalling → sales and interpretation walk through → dining and breakout areas → research and hatching encounter → education in the amphitheatre → lead up to the beach experience.

This concept design is an initial recommendation and would be subject to refinement based on community feedback and issue of a detailed design brief.

The proposed facilities have been categorised into 7 zones and are detailed in the following text.

1. Amphitheatre

The existing amphitheatre could be refurbished with a new concrete deck and stepped seating. This viewing area would be enclosed with an opaque tensile fabric roof and wall structure. The space could be naturally ventilated and would incorporate fans for comfort.

2. Mon Repos Research Centre

Turtle researchers could be accommodated within the existing Visitor Centre building, which could be refurbished to provide: an office for the lead researcher, data entry stations, a work area, and a wet lab and display windows with blinds (for privacy if required from time to time). Visitors to the research area could be able to view the researchers and live displays through the display windows. The existing projection room and screen could remain as is.

A new turtle hatching pool conservation and elevated viewing deck with a range of pools would provide year round wildlife interaction for visitors to the Visitor Centre. Fresh seawater would be required to be pumped through the pools. Additional breakout decks off the spine walkway have been provided adjacent to the existing beach access points.
3. QPWS Rangers and Volunteer Facilities

A new pavilion strategically located behind the research area could provide much needed facilities for the QPWS Rangers and volunteers. Required toilets and showers have been integrated with a locker area and foot wash bay. The Rangers could also benefit from a dedicated office and a staff room which could also be shared by all Visitor Centre staff. A store would be provided for QPWS use, including merchandising storage.

4. Dining and Breakout Facilities

A new air conditioned cafe/dining area (provision of 100 seats as per industry average) would be serviced by a commercial kitchen. This space would open up to a protected landscaped court, a quieter and more contemplative space for more informal dining/breakout 30 seats/seat walls. Both these areas would be accessed off the covered spine walkway. Public male, female and pwd wcs would be accommodated within this pavilion. The kitchen would be serviced via a rear path and screened refuse area.

Careful consideration would be required when designing these facilities to ensure that, the cafe/dining area does not negatively impact the visitors’ turtle encounter, a guiding principle for the Centre, particularly with regards to the close proximity of the turtle hatching area. Integration of; full height glazing to the cafe frontage, warm soft colours and finishes that dampen acoustics and subdued table level lighting are some, but not all of, the strategies that should be explored in order to create an environment that will be complementary to the visitor experience.

It is envisaged that these facilities would be managed and maintained by a separate commercial operator.

5. New Interpretive Centre and Entry

The spine walkway could be accessed via a generous entry canopy with integrated seating and entry signage. Visitors to the centre would be able to congregate in the entry court which would incorporate sales, orientation and merchandising functions. A separate air conditioned display area with contemporary exhibits could refresh the interpretive aspect of the Centre.

High levels of visible and physical permeability and covered open spaces could provide much needed legibility and protection for large numbers of visitors during both hot days and inclement weather events.

6. Car Park and Entry Feature

A new landscaped entry feature could signify arrival into the Mon Repos Conservation area at the junction with Mon Repos Road. The existing access road could link to a newly reconfigured and paved car park which would provide; people with disability (PWD) car parking, approximately 110 visitor car parks, 6 staff car parks and a bus set down/pickup area. A hardstand and QPWS maintenance shed could be constructed adjacent to the staff car parking.

The car park could also be landscaped to provide shade, amenity and screening to the proposed fox fence on the southern boundary. Note, the fox fence alignment is shown.

7. ‘Glamping’ Accommodation

‘Glamping’ is a growing ecotourism accommodation trend that has been very popular in many overseas destinations and is growing in popularity in Australia. ‘Glamping’, glamorous camping, essentially means that the tent and other services are provided for the visitor. This provides the outdoor camping experience but in a convenient way particularly for visitors who do not have camping equipment or time to assemble the tent.

An area located on the existing researchers’ facilities site has been identified on the Concept Master Plan as another opportunity for commercial involvement within the conservation area. Central dining and meeting facilities would be surrounded by high quality permanent tent accommodation with integral bathrooms. Other shaded seating areas and bbq decks would offer additional amenity.

During the nesting season, research staff and volunteers could be offered this accommodation, which could be block booked by the Research Centre. Out of season, visitors would be able to enjoy a high quality ecotourism experience adjacent to the pristine Mon Repos beach.

11.4. Concept Master Plan Figures

The concept master plan designs on the following pages represent an artists’ impression of what the Mon Repos Turtle Centre could look like. A functional design brief for the visitor centre would enable a more accurate design based on specific requirements for elements such as the interpretive centre, food and beverage and retail. The design provided is based on a number of informed assumptions with regards to the facility and the final look, size and layout of the Visitor Centre may be quite different. Community feedback will help shape the final concept Master Plan.

The illustrations that follow can be described as follows:

- Figure 11.4a: General site arrangements;
- Figure 11.4b: Proposed layout of the Visitor Centre;
- Figure 11.4c: Proposed layout of the Visitor Centre – floor plan arrangements;
- Figure 11.4d: Proposed Core Zones within the Visitor Centre;
- Figure 11.4e: Proposed Site entry and proposed location of ‘Glamping’ opportunity;
- Figure 11.4f: Artist’s Impression of Mon Repos Turtle Centre in the daytime; and
- Figure 11.4g: Artist’s Impression of Mon Repos Turtle Centre at night.
Figure 11.4a: Proposed Mon Repos Concept Master Plan
Figure 11.4b: Proposed Mon Repos Turtle Centre
Figure 11.4c: Proposed Mon Repos Turtle Centre Ground Floor Plan
Figure 11.4d: Proposed Mon Repos Turtle Centre Zoning Plan
Figure 11.4e: Proposed Mon Repos Turtle Centre Typical Cross Section Legend
Figure 11.4f: Proposed Mon Repos Arrival and Glamping
Figure 11.4g: Artists Impression of Mon Repos Rendered Perspective (day)
Figure 11.4h: Artists Impression of Mon Repos Rendered Perspective (night)
12. PROPOSED BUSINESS AND GOVERNANCE MODEL

Recognising the future challenges to marine turtle populations and that the loggerhead turtles who nest and hatch at Mon Repos are a major driver of the $320M/year local tourism industry, the Project Steering Committee established a new vision for the new Mon Repos Turtle Centre, which is:

“The Mon Repos Turtle Encounter will be famous as the world’s ‘best practice’ turtle experience and turtle conservation movement.”

Following finalisation of the concept Master Plan and staging plan, there are a number of considerations that may guide the development of an appropriate business and governance model for the site. These include:

- Maintain and further develop a customer relationship business. The purpose of this business is to create an emotional connection with the visitors, the local community and key influencers to the challenges faced by Mon Repos turtles and the solutions that can be adopted.
- Support the operations and development of Mon Repos so that all the key functions of the business are focused and aligned with the survival and wellbeing of Mon Repos turtles.
- Develop and implement a brand and marketing strategy to acquire visitors and to keep the visitors engaged and contributing to the cause of the Mon Repos turtle.
- Enhance and support the role of the Rangers and volunteers in being a highly visible and engaging component of the visitor experience. This is critically important and also a core pillar of the new NPRSR brand strategy.
- Implement a series of potential revenue streams that could generate income for Mon Repos Turtle Centre and better reflect the value of the tourism product on offer. These include increased ticket pricing and tiered pricing matched to experience and group size; commercial lease of food and beverage, retail and merchandise; corporate sponsorship; donation program; education programs and glamping accommodation fees.
- Develop a governance model that enables re-investment in the Mon Repos Turtle Centre over the long term for the benefit of the recreational activities at the site and allows such investment to be utilised by those with key interests in its success ie for marketing.
- Facilitate the ability to be entrepreneurial, pro-actively anticipate and respond to market needs and recruit and/or upskill a centre manager that has a skill set including marketing, commercial management etc.
- Implement a Turtle Conservation Roadmap and other associated activities by establishing a dedicated foundation or trust fund that can use tax deductible donations. The purpose of the proposed Turtle Foundation would be to support turtle conservation activities at Mon Repos and the wider region through funding conservation activities and issuing grants to researchers and conservation groups.
13. PROPOSED TURTLE CONSERVATION ROADMAP

In the development of the concept Master Plan vision for Mon Repos it has been clear that the research and science associated with the protection and conservation of marine turtle populations is a key dependency for the future visitor experiences and viability of this attraction over the long term.

There are a number of known key challenges facing marine turtles and identified priority actions for supporting the recovery and ongoing health of the species. Action requires collaboration at the local level but also with various State and Federal Government agencies and relevant industry partners, interest groups and researchers. This effort needs to be informed by a review of the effectiveness of current activities and strategies that are in place, identifying new models for collaboration where necessary. The outreach and impact of the conservation effort should grow as the profile and revenue generated by Mon Repos expands.

13.1. Key Areas of Focus

There are five key areas that would underpin a turtle conservation roadmap and provide key objectives for consideration of any future ‘foundation’ activities:

1) Developing a shared vision for the conservation effort;
2) Collaboration between all levels of Government to respond to the various challenges facing turtle populations at the local, state and global level. This would require agreement on priority actions, funding sources, key actors and timeframes, as well as monitoring outcomes.
3) Funding through tourism revenue and private donation or public grants to support ongoing habitat protection, advocacy and research efforts for Mon Repos but also in support of other sites in Queensland. This would require establishment of appropriate models for managing the investment and allocation of funds.
4) Partnerships with education, research organisations and interest groups such as universities and wildlife centres and hospitals to support conservation efforts at the site and around Queensland.
5) Raising public awareness through visitation to the site and other public outreach activities such as the interpretive centre and an educational website and social media program.

13.2. Potential Conservation Roadmap for Mon Repos

An example Conservation Roadmap 2015-2030 is outlined in Figure 13.2. A roadmap of this nature could represent the shared direction of key stakeholders involved in turtle conservation and research at Mon Repos. The roadmap could be used to guide conservation priorities and focus resources and funding. It could be developed through an iterative process with key stakeholders and would involve an assessment of the effectiveness of current conservation, policy and research activities.

Figure 13.2: Example Conservation Roadmap (adapted from WWF Roadmap for a Living Planet)
14. POTENTIAL STAGING

The proposed concept Master Plan would need to be delivered through a staged approach that is dependent on available NPRSR funding, potential future State Government and private investment. The long term vision for the site is to create a world’s best practice turtle conservation centre and experience that integrates visitor experiences with turtle conservation.

14.1. Initial Stages – First Steps

It is envisioned that there are a number of potential deliverables for the short term. The funding currently available for Mon Repos is intended to focus on improving the visitor experience (including new products), support this with additional resources and training for Rangers, commence the implementation of new governance arrangements that will support a more commercial business model and commence changes to ticket prices that will generate increased revenue in the season.

In addition, roofing of the amphitheatre is considered an important immediate investment. This will improve the visitor experience significantly in that it provides cover during rainy weather and cooling during the hot summer months of peak turtle season. Visitors often have to wait significant periods of time to be taken to the beach and providing a covered area supported by improved audio visuals will improve the experience substantially.

Specifically, the following activities to improve the visitor experience are proposed in the short term:

- Implement new tourism products to generate revenue from the smaller more engaged group offering;
- Develop new movie and visual products for visitors waiting at the visitor centre for the turtle encounter;
- Implement the ‘gateway’ visitor centre offering and link to the SGBR;
- Identify and undertake staff resourcing and training to deliver the enhanced tourism product; and
- Provide increased resources and training for staff to assist with delivery of the experience.

- Design and construct a new high quality landscaped entry feature, with integrated and illuminated signage, at the Mon Repos Road site access; and
- Design and construct a tensile or insulated roof over the existing amphitheatre for increased visitor amenity. The new roof would need to incorporate side walls, fans and low level high pressure sodium lighting (delivery as part of First Steps is subject to detailed design and costing).

In relation to site governance, the first steps would include progressing the investigation and implementation of a model that includes a commercial focus to centre management, revenue hypothecation for reinvestment, development of a Turtle Foundation that would be able to attract funds to support the wider conservation objectives for Mon Repos and the marine turtles; and flexible fee structures that allow the centre to respond to changing market demands and integrate offerings into the tourism market.

For the longer term deliverables it is assumed that NPRSR would continue to attract and secure funding to upgrade the Mon Repos Turtle Centre (see section 14.2).
15. COMMUNITY CONSULTATION

NPRS has developed a Discussion Paper based on this concept Master Plan to gain the community’s thoughts and insights into the future vision for Mon Repos. The Discussion Paper explores the redevelopment opportunity and the main elements of the proposed concept master plan. Questions have been included in the Discussion Paper and can be used to provide feedback to NPRSR via an online survey.

The timeframes for community feedback and finalisation of the concept Master Plan are as follows:

**Public Release - 20 Dec 2013**
Public consultation 8 weeks; information at each Gateway Centre, on-line Feed back form, community workshop and stakeholder consultation

**Consultation Report - late April 2014**
Review community and stakeholder feedback incorporating key elements of findings and provide Consultation report back to community.

**Final Master Plan - 30 June 2014**
Develop final Master Plan considering community benefits, financial considerations, site constraints and recreation opportunities.

Figure 15.1 Community consultation program
Appendix A
Overview of Marine Turtles

This Appendix provides an overview of the long and migratory life histories of marine turtles, the current distribution, abundance and status of marine turtles in Queensland and the local, regional and global threats they experience as they grow from hatchlings, to post hatchlings and into adults.

A1. Marine Turtle Life Events

Marine turtles live for many years and take 30 to 50 years to reach breeding age. They have complicated life histories as shown below:

![Figure 5.2a: Marine Turtle Lifetime (source: Col Limpus, Queensland Turtle Conservation, Department of Environment and Heritage Protection, 2013)](image)

As hatchlings they experience their lowest survivorship rate with predation and light spill from coastal development (which disorients their return to the ocean) their biggest threats.

During the post hatching years (15 – 30 years) marine turtles will cross great distances across the Southern Pacific ocean feeding off food on the ocean’s surface before they return as adult turtles to the coastal shallow waters of Queensland for breeding. These years are referred to as the ‘lost years’ and in the open ocean they are vulnerable to a number of threats including commercial fishing and ingesting or becoming entangled in plastics.

Adult marine turtles show high levels of fidelity to both breeding and feeding areas. For this reason they are highly vulnerable to any impacts that result in systemic decimation of the population or their nesting or foraging habitat. As stated by Dr Col Limpus, Chief Scientist, Aquatic Threatened Species and Threatening Processes of EHP in the A Biological Review of Australian Marine Turtles, 2008: “In management terms, this means that should there be a significant population decline at one of the major breeding units, there is little probability of it being repopulated from other stocks in the time frame of human management. The breeding populations in Australia are therefore unique”.

The marine turtles that visit Mon Repos are a species and genetic stock that are unique to the area. This is the reason for the critical importance in protecting marine turtle habitat and coastal areas and tracking and monitoring visiting turtle populations to determine ways to reduce impacts they may experience on their long migratory journeys.

Marine turtles often travel thousands of kilometres between their foraging or feeding areas and nesting beaches. Figure 5.2b shows the feeding and nesting grounds of Mon Repos loggerhead turtles.

![Figure 5.2b: Post-Hatchling Dispersal of Loggerhead Turtles (source: Col Limpus, Queensland Turtle Conservation, Department of Environment and Heritage Protection, 2013)](image)
A2. Distribution, Abundance and Status of Marine Turtles in Queensland

The long term future for marine turtles nesting at Queensland rookeries is uncertain. Col Limpus in his presentation titled *Queensland Turtle Conservation, 2013* has identified the following observations and challenges:

### Table A2: Status of Marine Turtles in Queensland

<table>
<thead>
<tr>
<th>Marine Turtle</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loggerhead</td>
<td>Habitat management for loggerhead turtles in Queensland is strong due to the fact approximately 90% of nesting occurs in national parks and approximately 50% of eastern Australian coastal waters are marine protected areas. There is also compulsory Turtle Exclusion Devices (TEDs) in trawl fisheries. In other south-west pacific locations such as New Caledonia however, there is limited habitat management.</td>
</tr>
<tr>
<td>Green</td>
<td>Many green turtle rookeries have not been surveyed particularly in Indonesia, Malaysia and the Philippines. The southern Great Barrier Reef nesting population has more than doubled since the 1960s.</td>
</tr>
<tr>
<td>Hawksbill</td>
<td>Many hawksbill rookeries have not been surveyed particularly in Indonesia, Malaysia and the Philippines. The North Eastern Australian population has been declining at 3 – 4 % per year.</td>
</tr>
<tr>
<td>Flatback</td>
<td>Since the 1920s there has been a probable decline in the population which has stabilised between 1970 – 2010.</td>
</tr>
</tbody>
</table>

Olive Ridley: Endangered species highest priority
- There has been 90%+ predation of turtle eggs on the mainland for the last 30 years which has resulted in zero replacement of new breeding adults from nesting. Hatchlings rarely recorded and not well quantified. Dogs, pigs and varanids are the main predators. At least 70% of clutch needs to survive to provide adequate population buffer.
- Queensland nesting is only in the Western Cape York Peninsula
- Unique genetic stock

A3 Responding to Threats on Marine Turtles

The highly migratory nature of marine turtles, the high level of fidelity to breeding and nesting grounds and the late age (30 – 40 years old) that they breed, means this species is highly vulnerable to impacts on their habitat as well as out in the open ocean.

#### A3.1 Local threats

The following considers the known local threats to turtles at Mon Repos:
- Light pollution: Lights from coastal development results in changed light horizons, which causes increased mortality of hatchlings when they move towards stronger light sources inland instead of the low horizon at sea. There is also a decline in the recruitment of new adults to nesting populations on lit beaches as they avoid brightly illuminated beaches.
- Habitat changes: DEHP has identified that wetland areas adjacent to Mon Repos have been drained, which reduces the cooler water draining across the beach that maintain the turtle eggs at optimum hatching temperatures.
- Adjacent development: Future incompatible development in close proximity to Mon Repos such as on the former caravan park to the south and the Bundaberg Sugar land to the west have the potential to result in light pollution, changes in the groundwater table and reduce the conservation integrity of the site.
- Feral predators: Feral predators, such as foxes, eat turtle eggs and hatchlings. Although the State and Local Government is controlling feral predators on islands and mainland sites where loggerheads nest, the control of feral predators are still an ongoing issue as they continue to invade from adjacent habitat. At Mon Repos funding has recently been allocated for the construction of a fox fence (see section 12 for details of the proposed location of this fence).

#### A3.2 Regional threats

The following considers the known regional threats to turtles in Queensland:
- Declining sea grasses: Cumulative impacts from coastal development such as ports can alter foraging habitat of in-shore coastal waters directly removing or indirectly impacting on sea grass beds.
- Boat strike: Boat strike can kill marine turtles especially in estuaries, sandy straits and shallow inshore areas, and damage increases with boat speed. Damage to the shell may lead to death or disruption to feeding or breeding regime.
- Fishing trawlers and crab pots: Marine turtles get tangled and drowned in commercial and recreational crab pots and their float lines as well as prawn trawlers. In recent times, commercial fishing vessels have been required to be fitted with Turtle Exclusion Devices (TEDs).
A3.3 National or international threats

The following considers the known national and international threats to turtles:

**Ingesting plastic pollution:** As well as local pollution of plastics on the Queensland coastline, on a global scale, there are potentially five plastic garbage patches located in the North and South Pacific Ocean, North and South Atlantic Ocean and Indian Ocean. The South Pacific Ocean garbage patch for example is estimated at 715,000km² with a particle density of 40,000 pieces per square kilometre. (refer www.seas.columbia.edu/earth/wtert/sofos/sesini_thesis.pdf). Hundreds of thousands of marine mammals are killed by ingestion or entanglement in plastic debris. International and domestic effort is required to reduce pollution of the ocean and clean up garbage patches.

**Unsustainable exploitation:** Traditional communities within Indonesia, Philippines, Malaysia and elsewhere harvest marine turtles for food and craft. Unsustainable levels of harvesting can decimate turtle populations. International and domestic effort is required to reduce unsustainable harvest and exploitation of threatened species.

**Long line fishing that catch turtles as a by-product:** During the return migratory journey of the turtle from Australia to South America they are at risk of death or injury in long line fishing. Longlines are set horizontally either on the ocean floor or near the surface of the water. Longlines can be tens of kilometres long and carry thousands of hooks. Baited hooks are attached to the longline by short lines called snoods that hang off the mainline. International and domestic effort is required to introduce technologies and protocols to manage the impacts of commercial fishing on threatened marine species.

In 2011, the Australian Government prepared Species Report cards for listed species under the EPBC Act. These report cards outline the conservation status of the species, define biologically important areas and assess the level of concern in relation to different pressures (refer www.environment.gov.au).

Table A3 below provides an overview of the marine turtle populations of Australia’s Temperate East Marine Region. As identified and reinforcing the threats identified above, there are a wide range of pressures that are of concern or have the potential to concern the conservation of marine turtle species in Queensland and these can be used to determine conservation priorities for marine turtles for Mon Repos.

<table>
<thead>
<tr>
<th>Pressure</th>
<th>Source</th>
<th>Logger-head turtle</th>
<th>Hawksbill turtle</th>
<th>Green turtle</th>
<th>Leatherback turtle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sea level rise</td>
<td>Climate change</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Changes in sea temperature</td>
<td>Climate change</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change in oceanography</td>
<td>Climate change</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ocean acidification</td>
<td>Climate change</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chemical pollution/contaminants</td>
<td>Shipping Vessels (other)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nutrient pollution</td>
<td>Urban development, Agricultural activities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marine debris</td>
<td>Shipping, Vessels (other), Fishing boats, Land-based activities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Noise pollution</td>
<td>Urban development</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Light pollution</td>
<td>Land-based activities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Physical habitat modification</td>
<td>Dredging Dredge spoil</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Fishing gear</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Human presence at sensitive sites</td>
<td>Tourism Recreational and charter fishing Research</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Extraction of living resources</td>
<td>Commercial fishing (domestic)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Commercial fishing (non-domestic)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Recreational and charter fishing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Indigenous harvest</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bycatch</td>
<td>Commercial fishing (domestic)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Recreational and charter fishing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Illegal, unregulated and unreported fishing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Pressure Sources

<table>
<thead>
<tr>
<th>Pressure</th>
<th>Source</th>
<th>Loggerhead turtle</th>
<th>Hawkbill turtle</th>
<th>Green turtle</th>
<th>Leatherback turtle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oil pollution</td>
<td>Shipping, Vessels [other]</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Oil rigs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collision with vessels</td>
<td>Shipping, Tourism, Fishing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Invasive species</td>
<td>Shipping, Fishing vessels, Land-based activities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Changes in hydrological regimes</td>
<td>Climate change</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Changes in terrestrial sand temperatures</td>
<td>Climate change</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Legend**
- Red: of concern
- Yellow: of potential concern
- Green: of less concern
- Black: not of concern
- Grey: not assessed

Source: abridged from *Species Group Report Card, 2011*
Appendix B

Preliminary Master Plan Concept Options

Figure A: Option 1: Interpretive and Research Centre Strategy
Figure B: Option 2: Interpretive & Research Centre Strategy