Beyond Tourism 2020 Industry Workshop Report

For Austrade
March 2019
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01: The Workshop

The Beyond Tourism 2020 Steering Committee’s Report [the Report] was released by the Minister for Trade, Tourism and Investment in 2018, with a corresponding consultation process launched to hear from the full spectrum of the tourism industry.

The Beyond Tourism 2020 Industry Roundtable workshop was commissioned by Austrade to enable an additional conduit for input to the consultation by industry representatives, before the consultation close date of 8th March 2019.

This workshop was an opportunity for participants to:

- Identify the challenges, gaps and game changers for the industry
- Articulate future areas of focus
- Share their on-the-ground insights with Government, and
- Provide feedback on the Steering Committee’s report.

Through their participation in the workshop, attendees were able to provide their views on Australia’s next long-term tourism strategy.

This report contains the inputs generated through the workshop process.

Participants:

There were 30 active participants in the workshop on Friday 1st March 2019.

Workshop Structure:

The workshop was structured in four parts:

- **Visioning** – what does the future of the tourism industry in Australia look like in 2030?
- **Challenges & Opportunities** – exploring these within the context of the Report, and identifying areas that may not have been covered in the Report
- **The Six Pillars** – as set out in the Report
- **Game changers** – identifying the actions that would have the most positive impact on the industry into the future.

The design of the workshop focused on eliciting inputs and feedback from participants on each of these four parts and generating input to the consultation process.

The workshop ran for 90 minutes, from 2:30 – 4pm on Friday 1st March 2019, at the Pepper’s Seaport function centre in Launceston, Tasmania.
02: Visioning – “Into the future ... 2030”

Q1: “How would you describe the successful Australian Tourism Industry of 2030?”

Participants were asked to input their response to the above question into ‘Poll Everywhere’ software via their smartphones. The following are the inputs and the resulting word cloud. The word cloud shows words used with higher frequency in a larger font size.

Word Cloud:

Verbatim Responses:

- Sustainable tourism growth
- Memorable
- Accessible
- Experience focused
- Valued
- Environment
- Authentic
- Flexible
- Supported
- High yielding
- Trending
- Awareness of clear points of difference.
- Successful
- Universal design
- Dynamic
- Growth
- Accessible
- High quality and value for cost
- High yield, high quality and regionally based
- sustainable
- Sustainable, Resilient, engaged with government and society, competitive
- Bustling
- Highly personally engaging
- Collaborative
- Sustainable, memorable and iconic
- Sustainable considered a key driver to improve communities across Australia
- Eco tourisms
- Accessible
- Visitors can access info on demand and relevant to location
- Solid
- Cohesive focused unified
- Carbon neutral/negative experiences
- Sustainable
Q2: “What is the one critical factor you believe will underpin your success in 2030?”

Participants were asked to input their response to the above question into Poll Everywhere software via their smartphones. The following are the responses received.

- Tourism and government support with climate change risks on business and natural assets
- Vulnerability
- Growth in experiences
- Accessibility
- Reducing impacts of seasonality
- Multilingual
- Regional resilience
- Government intervention
- Environmental, social and economic balance
- Connecting with community
- Access to funding
- Protecting the environment
- Investment
- Accessibility (cost)
- Collaboration
- Regional focus
- Government investment in climate change
- Infrastructure
- Responsive
- Getting your performance measures much better
- Address both positive and negative impacts of tourism
- Access
- Understanding what tourists want
- Government investments
- Government support, cut the red tape
- Quality service
- Social license through community engagement
- Whole of industry support
- Regional focus
- Marketing
- Accessibility
- Transport
- Inclusive tourism
03: Challenges & Opportunities

Anchoring to the sub-headings within the Opportunities & Challenges section of the Report, participants were asked to brainstorm individually the challenges and opportunities that they saw or were experiencing within the industry. They were then asked to categorise these thoughts into the Report sub-headings. Ideas that fell outside of the Report sub-headings were captured in the Other category. This Other category may, therefore, contain gaps or areas not yet considered by the Report.

Accessible Tourism

**Opportunities**
- Good design rather than design for disabilities
- Being descriptive to allow individuals to decide if it’s “accessible”
- NDIS disability respite accommodation
- Greater accessibility to regional areas (air/bus/train)
- Social need to disconnect
- Insight for us all by employing people with disability

**Challenges**
- Disability sector is typecast - good design is good design; e.g. if ramp makes it easier for people with disability, then just have a ramp
- Accessible tourism shouldn’t only mean accessibility for the workforce, it should also mean accessibility for employment of people and disability in tourism
- Inclusive experiences (major marketed items – e.g. Harbour Bridge, Great Barrier Reef)
- ‘Universal design’ should be the norm moving forward, which enables disabled access to be normal

Technology

**Opportunities**
- Embracing sustainable energy
- Efficiencies with new technologies
- An opportunity for a really good cutting-edge tourism app
- Make travel easier – less hassle
- Interpretation
- Destination marketing apps
- Systems that reduce wait times
- Paperless practices

**Challenges**
- Innovation
- NBN – access issues in regional areas
- Regional telephone, access/internet, slow
- More granular detail with respect to data
- Why are we still so reliant on paper forms when technology exists to capture information? E.g. incoming passenger cards at airports
- Access on social media
- Tourism apps – if we are not unified the space could end up littered with apps

Social Licence

**Opportunities**
- Actively manage tour group movements
- Rewrite social license section
- Work with communities to improve/generate social license
- Federal government tax breaks for regional areas (workforce)
- Encourage skilled migration to regional areas
- Connectivity through the phones and iPads to better sell and see the areas

**Challenges**
- Managing impacts on traditional farming communities – developing tourism communities
- We need guidelines for proper consultation process across the nation
- Narrowly written and not well done for Report
- Social license is as much about impacts as it is about understandings. Social impacts need to be addressed. Communication is not enough
- Seasonality and primary industries
- Concentrated interest in limited hot spots
Emerging Markets

**Opportunities**
- Diversity of new product
- Language skills for Australians
- New audience + markets
- Cultural awareness training in foreign countries
- Falling AUD
- Growing middle class in Asia
- Need for regional accommodation
- Leverage off true wilderness places

**Challenges**
- Cost of visit
- Lack of preparation for emerging markets
- Natural high value areas
- Investment in other infrastructure (e.g., roads in Tasmania) to facilitate tourists
- Ecotourism should be a norm, not a complete edge
- Emerging markets needs a more practical approach. Need more practical mentoring
- Lack of exposure
- Support of industries in that region until manufacturing of purchasing their goods

Maintaining Competitiveness

**Opportunities**
- Differentiating on a global scale. We have something special to offer
- Quality (must be valued accordingly)
- 10% failure rate accepted for government program
- Unknown destinations throughout Australia to encourage both emerging and existing markets
- Group bookings, target markets

**Challenges**
- Focus on just Indigenous tourism as a means to maintain competitiveness
- Price of fuel, issue regionally
- Developing new products to meet new demand
- Quality not quantity
- High cost of doing business in Australia, e.g. overtime rates, electricity taxes
- Government not working together with other parts of government

Sharing Economy

**Opportunities**
- Sharing economy, increasing levels of service and standards
- Untapped
- Rarity of what Australia offers – value vs expense
- Influences ‘home grown’
- Leveraging air expenses for rural tourism, experiences outside of existing zoning
- Work with primary industry

**Challenges**
- No model to support the growth and opportunity of sharing economy, i.e. tax
- Co-operation
- Challenges brought by the sharing economy need to be addressed
- Use of sharing economy → grab market share but don’t engage in coordinated demand – driving activity – need to engage!
- Lack of cultural experience products

Popularity of Online Education

**Opportunities**
- Knowledge accessible
- Online activity increasing

**Challenges**
- Use to advantage
### Ultra-Long Haul

**Opportunities**
- New gateway cities with capacities for air and accommodation
- Improved convenience – more likely to travel long distance
- London – Perth flight opportunity
- Getting easier to travel to Australia and this needs to continue

**Challenges**
- Accessibility
- Focus on Sydney as Australia’s gateway when there are already capacity issues
- Promoting regional areas – e.g. marketing Canberra as more than Parliament House + War Memorial

### Other

**Opportunities**
- Need to create jobs so match this with tourism development and training
- Co-operative projects
- Joined up thinking
- Opportunities to communicate other benefits that are brought by tourism in addition to economic areas
- Recognise natural + cultural core assets that the tourism industry in Australia relies on
- Falling real estate values
- Create performance measures that link to regional and social needs/ways of working
- Opportunity to shape tourism as a way to make Australia more resilient to disasters
- Opportunity to engage urban planners in tourism development to maximise benefits and social license
- Upgrade existing infrastructure (not just new)
- Engage a wider base of contributors to develop documents/policy
- Promote low carbon holiday destinations
- Focus on tourism industry as strong employer
- Night-time economy drinking culture
- Strength in collaboration
- Significant capital around at present – need to invest it well
- Enabled sustainability in the industry

**Challenges**
- Lack of climate disaster response – okay for farmers and poor for tourism
- Need much better performance measures in documents to help us reconnect locally
- Funding for regional tourism projects
- Internal competition diluting brand
- Lack of accommodation in 2030
- Lack of ongoing strategy for maintenance + growth of existing markets
- Transition to a low carbon future – customers want it and supports the reef etc.
- Training – staff dedicated. Finding local staff in area
- Tourist vulnerabilities to disasters needs to be addressed
- Urban planners need to be engaged in tourism development
- Competitive industry requires cross agency support to keep natural assets strong
- Over-tourism – need to develop new destinations
- Connectivity – need to connect attractions to form clusters – need transport, accommodation + attractions all cohesive
- Training
- Lack of consistent government investment
- Getting coaches close to attractions
- Regional dispersal beyond airports
- Build product – scene, increased multiyear funding for national parks
- Collaboration to grow economy
04: The Six Pillars

Participants were in six table groups of 4-6 attendees. The Six Pillars were represented on six butcher’s paper easels that were rotated around the room so that each table had between 6-8 minutes to capture their thoughts, comments and inputs on each. The topic of each pillar was positioned as a question to assist participants to generate their inputs.

How Do We Address Capacity Complaints?

- Volume – Yield poorly articulate + methods
- Experiences critical in this
- Each destination needs to maintain its own personality so it’s not a one solution for all
- Different in different places
- Capacity management
- Can your roads cope with new markets you’re attracting? E.g. self-driving Chinese tourists on Tasmanian roads (widen the road or set the capacity).
- Risks?
- Kill 9-5 attitude, tourism is 24 hours → employment awards
- Government needs a metric of demand
- Great Barrier Reef. Limited access?
- Refocus on not just Syd and Mel → regional disposal
- Engage with urban/ town planners
- Sharing economy
- Whole of government approach in strategy design
- Lived experience in policy making positions (tourism industries)
- Drive the demand for a quality unique product, producing higher yield, to drive volume – capacity down
- Focusing on the right target market – at local level
- Creating products specific to your target markets – tied product development

How Do We Better Use Data?

- Emerging trends, early ID
- Visitor flows mean infrastructure requirements/upgrades
- Lead innovation
- Better quality data at regional/local level
- Better data to drill into
- Visitations to towns, nature based etc.
- Better insights for businesses to make decisions
- Publicly available – easy to drill to get specific needs
- Real time data = predictive tools
- Turn data into predictive tools vs hindsight
- Collect good data – using similar metrics
- Open data systems
- Better analysis and synthesis
- Mandatory to share data
- Harness AI to spot patterns etc.
- More flexibility to avoid unhelpful segmentation
- Get more data from people who do not come
- Develop more data platforms specific for collating industry product data to be unified across industry. E.g. WFA – cellar door metrics
- Understanding of customer and their needs
How Do We Drive Demand?

- Export sectors other than tourism, wine industry, China market
- Selling uniqueness of product. E.g. Pearl Industry
- Branding integrity → high yield market, positioning in market
- Support from government → funding, grants, program
- Skills development in regional areas – reduction of red tape particularly for small businesses
- Marketing our unique attributes
- More incentives – state/local/federal
- Community focus approach – good ideas need to be fleshed out
- Matches destination
- Both funded national parks
- Cost of air access internationally and intrastate
- Understand who is not coming and why
- Government needed to invest
- Remove barriers to access
- Perception
- High quality customer service
- Consist at whole of industry marketing → follow up
- Marketing = drives
- Target markets = expectations
- Using a coordinated events strategy to drive visitation → sport, business, festivals, cultural

How Do We Build a Sustainable Industry?

- Encourage large investments
- Capacity building → education
- Packaging product → to reduce individual marketing costs
- Infrastructure – develop national and state territory approach → unified approach
- Three pillars: social, environmental, economic – balanced on 3 tiers for government
- Social empowerment + inclusion in decisions
- Regionally in particular, finding niches – many small businesses (local) contribute
- Carbon offset initiatives
- Performance measures in Report are poorly written
- Measure community benefit – maximise positive social
- Cross agency collaboration – need to support National parks/ GRBM etc. as these are assets our tourism industry uses
- Embrace renewable energy
- Introduce paperless processes
- Encourage sustainable practices within organisations for staff and visitors (give them tools to do it)
- Ban/limit single use plastic
- Better education on programs like Soap Aid, Nespresso recycling + ACT smart sustainability
- Legislate and align tourism certification with environmental impact assessment/development
- Wider impact considerations

How Do We Harness Technology?

- Booking portals – one stop shop
- Use technology to ‘theme’ and connect product
- ‘Virtual’ tourism experiences as promotion and marketing
- Get rid of paper process
- To enhance sustainability (use phone – tech as keys)
- Get rid of hidden charges
- Translation technology
- Augmented reality
- Using tech for commercial in local regions – licensed with RTOs
- Integrated databases = business confidentiality
- Digital marketing training
- Social media
- Internet black spot – (Wi-Fi hotspots matched to tourist destinations)
- Push technology
- Holding large distribution plat forms
- Storytelling – linked to phone
- Cross-government safety, emergency management etc.
How Do We Establish a Suitably Skilled And Available Work Force?

- Training access – TAFE system has budget constraints = government needs to invest
- Long term/quality control of training, outcomes 5-10 year plans
- Privatisation of training
- Lack of research (academic) linked to training
- Courses/training needs to be effective – both $$ and careers
- By recognising both tourism and hospitality as career pathways
- Collaborate/recognition rewards for all types of jobs

- Recognise volunteers to manage appropriately
- Treat tourism as a genuine industry with identified career paths, e.g. Crown resorts
- Seasonality – keeping good staff, set up process to trade staff
- Partnerships between different climatic areas, i.e. TAS and NT
- Year round employment allows career progression
- Flexible work arrangement (support for senior staff balancing family life)
- Paternity leave needs to be more flexible. Paternity rather than assumed maternity
- Child safe environment.
05: Game Changers

Q: “What is the most important game changer for the industry to drive success to 2030?”

In five groups, participants were asked to brainstorm their responses to the above question. These responses were captured and are reported below. Each table was then asked to identify from their brainstorm of ideas, the top game changer and present that to the whole group. Five top game changers were proposed. Each individual participant then voted for the one that resonated most for them. The Top 5 Game Changers are listed below in the order of the most votes received to the least. The % of the vote achieved is identified for each.

All Game Changers:

- Investment in infrastructure
- For tourism to be seen as a united industry by our government, business and investors – we are (currently) so fragmented
- Change focus away from Sydney and Melbourne (recognising these as gateways), and focus on regions; establish regional gateways
- Remove/Adjust penalty award rates – current annual increase each year is unsustainable
- A unified simplified structure in government
- Removing the red tape for business
- Real time data
- Funding in regional areas (campaigns)
- Shift from just marketing to planning, development and marketing
- Political parties need a tourism strategy; bi-partisan
- Better training and attractors of staff to the industry
- Access to cheap capital via grants and loans to develop infrastructure
- Grants for risk taking
- Tourism grants needed

Top 5 Game Changers:

1. Focus on the regions – create regional gateways; encourage dispersal beyond cities (39%)
2. Change paradigm – tourism is supported by government to create more liveable communities across Australia, so we need this outcome to be foremost – jobs is only one tool; economic/ social/ environmental; quality of life for the community is improved; not tourism growth at all costs and not volume everywhere (28%)
3. Funding for risk taking (17%)
4. Bi-partisan approach to a tourism strategy with all government department support (11%)
5. Removing government barriers for approval processes – building, skills and labour, environment, infrastructure (6%).
Summary

The workshop was a strong demonstration of the level of engagement that can be achieved with a group of diverse and passionate people who come together to champion that which they have in common – in this instance, the Australian Tourism industry.

The participants clearly articulated their desire for stronger collaborative links between government departments as they pertain to developing the Tourism industry.

They also had a common focus on regional development – not just of tourism destinations but of the infrastructure needed to enable the smooth travel of tourists to non-city locations.

The facilitated workshop garnered valuable contributions from stakeholders as an additional avenue for input into the Report.