Contents

01: The Webinar Workshop ................................................................. 3
02: Visioning – “Into the future ... 2030” ....................................... 4
04: Challenges & Opportunities .................................................... 6
05: Focus Areas ............................................................................. 13
06: Game Changers ....................................................................... 14
07: Summary ................................................................................. 16
01: The Webinar Workshop

Austrade is undertaking consultation to inform Australia’s next tourism strategy to 2030. A number of workshops are being held across Australia to facilitate stakeholder input to the strategy. The objective of each workshop is to engage directly with as many tourism operators as possible to enable their contribution to the development of the strategy.

A webinar workshop was held on Thursday, 31 October 2019 to enable participation from industry representatives that were unable to attend a face to face workshop.

The webinar workshop was held as an opportunity for participants to provide their input to the development of this strategy by:

- Articulating their aspirations for the Australian tourism industry in 2030
- Identifying challenges, opportunities and game changers for the industry
- Identifying focus areas that are important to their location (state/region)
- Sharing their on-the-ground insights.

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

This report contains the inputs generated through the webinar process. A recording of the webinar is also available via https://www.austrade.gov.au/Australian/Tourism/Policy-and-Strategy/tourism-2030/workshops.

Participants:

There were 105 participants in the webinar, achieving 97% interest and 100% attentiveness ratings on the GoToWebinar software tool that was used for the session.

Workshop Structure:

The webinar was structured with four main sessions:

- *Visioning* – what does the future of the tourism industry in Australia look like in 2030?
- *Challenges & Opportunities* – identifying the challenges and opportunities for the tourism industry in achieving a successful tourism industry in 2030.
- *Focus Areas* – voting on the top five most critical areas of priority for participants.
- *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 ideas and contributions from participants and generating input to the consultation process via real time online polling. This report is structured as per the webinar sections.

The webinar ran for 1 hour, from 3pm – 4pm on Thursday 31th October 2019 and was hosted online. Participants asked 17 questions during the webinar with most questions related to technical issues and internet connectivity.
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 or computer browser. 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:**

The top five responses were: industry, sustainable, employment, accessible and tourism.

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 or computer. The following are the responses received.

**Workforce**
- Peak-body-training
- Upskilling regional areas
- Service
- Skilled workforce
- Training (2)
- Training staff to provide exceptional service
- Skills (3)
- Add employment to metrics

(18 responses)

**Collaboration/partnerships**
- Innovation (7)
- Co-creation
- Connectivity
- Communication
- China; collaboration
- Direction
- Product
- Quality
- Technology
- Collaboration (11)
- Cooperation
- Customer experience
- Skilled labour
- Focus on employment
- Entrepreneurs
- Resources
- Productivity
- High quality of employee, strict industry rule (including monitoring from the related organisation)
- Marketing
- Promotion (2)
- Community
- Research
- Creativity
- Digital payment
- Stakeholder engagement
- Industry-wide approach
- Diversification
- Contribution
- Sector advocacy
Commitment
Government relations
Industry led, government support
Unique
Unity
Management
(50 responses)

Dialogue
Government support
Bold
Inclusivity and accessibility
Lobbying

Regional dispersal
Singular vision between regional, local and national
Regional support
Respect for Local Communities
Regional cooperation
(9 responses)

Dispersal into regions
Engaging regional, cultural and remote communities along from the beginning
Regional dispersal (2)
Aboriginal Australia

Sustainability and Environment
Environmentally friendly
Protecting our environment and wildlife
Avoidance of over tourism
Sustainable (3)
(9 responses)

Addressing climate change and its effect on tourism industries
Natural environment
World response to climate change

Data
Data (6)
Data analytics
(10 responses)

Availability of data to local level
Measurable results
Evidence-based decision making

Tourism and Infrastructure
Education
Global competitiveness
Capacity
Accessibility (3)
Infrastructure – roads/rail
Infrastructure
Experiences
China (3)
(23 responses)

Diversity (2)
People
Airline growth
Experiences (2)
Tourists
Quality
Direct flights to Perth
Visa

Investment
Private investment
Investment (12)
Funding (2)
(17 responses)

Finances
Security Token Offering promotion and publicity
04: Challenges & Opportunities

Participants were asked to individually brainstorm the challenges and opportunities that they foresee on the journey to 2030, entering them into Poll Everywhere via their smart phone or computer. The responses have been grouped into common themes by the webinar facilitators. The bullet points represent the actual comments entered by participants.

Challenges

Accessibility
- Accessibility
- Air access
- Airport capacity
- Aviation
- Flight connectivity
- Cuts to aviation routes
- Defining carrying capacity Difficulty to enter Australia
- Embracing inclusion/accessibility
- Industry attitudes to accessibility
- Lack of inclusive and accessible travel products
- Time / Distance
(11 responses)

Climate change
- Climate change and our position on this
- Climate crisis/disaster
- Environment degradation
- Environmental issues
- Flight shaming
- Our natural icons being destroyed by climate change
- Overinvesting on climate change
- Reliance on fossil fuels
- Resilience due to climate issues
- Too much emphasis on climate change
(10 responses)

Collaboration/Partnerships
- Collaboration
- Community support
- Consensus
- Cooperation
- Equity for host communities and ensuring natural resources are not compromised
- Host community tolerance
- Lack of regional collaboration
- Vested interests
(8 responses)

Competition
- AUD v USD
- Australian Dollar
- Commission
- Competing markets - New Zealand
- Competition
- Competitiveness
- Complacency
- Developing markets
- Distribution power houses
- Google
- International competition
- China
(12 responses)

Cost of travel
- Address the travel cost both domestic and international so Australia is not a bucket list
- Cost
- Cost of regional transport
- Distance
- Energy costs
- Expedia
- Expensive
- High costs in remote areas
- High fuel prices
- Insurance
- More Australians travel to Thailand and Phuket
- Rising costs
(12 responses)
Cyber security / use of data
- Accurate Visitor Data
- Bad research
- Cyber Security
- Digital disruption
- Digital Payments
- Digitalisation
- Misalignment
- Disruptive business models
- Strategic research
- Using Big Data better

(10 responses)

Funding
- Budgets
- Disasters
- Funding
- Funds
- Government funding for tourism infrastructure
- Infrastructure investment
- Lack of funding

(7 responses)

Infrastructure
- Mobile coverage
- Airport Infrastructure
- Infrastructure
- Lack of public support
- Public transport
- Transport infrastructure

(10 responses)

Quality of product
- Apathetic customer service staff
- Bringing new talent into management and advocacy positions
- Customer service
- Ego
- Facilitating the customer journey better
- How to focus on value
- International readiness
- Investment
- Online Booking
- Online travel agencies (OTAs)
- Product development
- Quality of service
- Quality-staff-retention
- Service quality

(10 responses)

Government and red tape
- Government policy
- Government policy changes
- Government relations
- Lack of Bi-Partisan support
- Make it easier for operators to be trade ready
- Tax restrictions
- Taxation on reinvested profit
- Visa
- opposition to collaboration at a government level (no sharing of information)
- Visa restriction
- Over-Regulation and Lack of Regulation
- Policy
- Political instability
- Politics
- Relevance of regional tourism boards

(15 responses)

Regional dispersal
- Lack of tourism dispersal
- Ongoing focus on metro areas (due to politics), no focus on regional/rural
- Promoting destinations that don't have the right product just because they are regional
- Refocus on regional areas
- Regional accessibility
- Regional dispersal
- Regional services
- Regional transport
- Sydney-centric
- The ability of infrastructure in regional Australia to cope with an increase in visitors
- Transport access to regional areas
- Transport into regions
- Transport to regions

(13 responses)
Workforce
• Wages cost
• Does not allow new graduates to feel comfortable working in the tourism industry if there’s not sustainable long term employment opportunities
• Labour
• Skilled labour (5)
• Skills and training

(12 responses)

Sustainability of industry
• Economic Crisis
• Economic downturn
• Economic flux, increasing poverty globally, political instability, local laws re international visitors, local visitors to reach regional destinations (transport & infrastructure), regional infrastructure (roads & accommodation), ease of booking, ability to promote against targeted personas
• Economic stability
• Economy
• Generational change/succession planning of small businesses
• Geopolitical factors
• Global conflict
• Global downturn
• Global economy
• Global uncertainty

(24 responses)

Technology
• Technology
• Technology adoption

(4 responses)

Unique offer
• Cultural differences
• Cultural-respect
• Experience saturation
• Generic-ness
• Groupthink
• Inauthenticity
• Innovation

(12 responses)

Promotion
• Awareness
• Broader acknowledgment of the industry as Australia’s mix
• Buzzwords

(5 responses)
Opportunities

Aboriginal tourism
• Aboriginal culture
• Aboriginal Tourism
• Indigenous

• Indigenous culture ingrained into tourism
• Indigenous product development
• Promote indigenous culture

(6 responses)

Accessibility
• Access
• Accessible tourism - $10.8 billion!!!
• Accessible tourism market
• All-inclusive / Accessible experiences
• Better connect Australia with the world
• Support more flight development - we are an island

• Excellence in Accessible/Inclusive Tourism Award Category
• Improve accessibility
• Inclusive/Accessible Tourism
• Robust inclusive and accessible travel products and offerings

(10 responses)

Affordability
• Affordability
• Cost-effectiveness
• Domestic market

• Domestic tourism
• Focus on price and value

(15 responses)

Climate change
• Electric vehicles to make industry more enviro friendly

(1 response)

Collaboration and partnerships
• Co-Creating
• Collaboration
• Co-Op’s
• Cross border collaboration
• Mash-ups within the industry
• Multilateral relationship
• New ways to collaborate

• Partnerships
• People-to-People
• Potential to help build community resilience
• Relationship
• Sharing economy
• Work together

(1 response)

Data
• 5G
• Big Data
• Big data analytics
• Complementary data sources
• Data
• Data analytics
• Data-driven
• Data-driven culture
• Digital tracking data
• Geolocation data
• Good research
• Investment in research

• Local area marketing to get more visitors from within Australia to explore the country (other than grey nomads), data & targeting, building brand AUS (more campaigns, more SOV internationally), content strategy, ongoing tracking, incremental increases in goal setting, national packages (Contiki type)
• Research
• Strategic research
• Using big data
• Using data to personalise tourist experience
• Customer data, market segmentation - internationally, nationally and locally.

(18 responses)
| Environment       | • Eco                                      | • Enviro-tourism - Sustainable experiences |
|                  | • Ecotourism                              | • Natural                                    |
|                  | • Ecotourism / sustainable tourism        | • Natural attractions                        |
|                  | • Ecotourism and Citizen Science Ecotourism| • Wildlife                                   |
|                  | • Environment                             |                                            |
| (9 responses)    |                                          |                                            |
| Events           | • Business events                         | • Major even                                 |
|                  | • Events                                  |                                            |
| (3 responses)    |                                          |                                            |
| Governance       | • Governance                              |                                            |
| (1 response)     |                                          |                                            |
| Growing markets  | • Ageing Baby Boomers                     | • India                                     |
|                  | • Asian markets                           | • International promotion                   |
|                  | • Aviation development to new markets     | • Latin America                             |
|                  | • Changing markets                        | • Latin America (More student and tourism   |
|                  | • China                                   |   visitors)                                 |
|                  | • Colombian tourists                      | • Medical tourism                           |
|                  | • Direct Flights to South America         | • South America and Africa as markets       |
|                  | • Education                               | • Study tour                                |
|                  | • Education tourism                       | • The primary era of the Baby Boomers -     |
|                  | • Expansion                               |   travelling and spending                   |
|                  | • Exploit growing Asian market            | • Working holidays                          |
|                  | • Gen Z                                   | • Britain (after Brexit)                    |
|                  | • Global                                  |                                            |
|                  | • Growing Asian middle class market       |                                            |
| (24 responses)   |                                          |                                            |
| Infrastructure   | • Better infrastructure                   | • Potential to leverage investment in       |
|                  | • Investment infrastructure               |   critical infrastructure                   |
|                  |                                          | • Transport within Australia                |
| (4 responses)    |                                          |                                            |
| Investment/Funding| • Investment                           | • So many locations not on the international|
|                  |                                          |   (or even national) radar.                 |
|                  |                                          | • Social Media                              |
|                  |                                          | • Storytelling                              |
| (1 response)     |                                          |                                            |
| Marketing        | • Improve marketing                       | • High-quality experiences                  |
|                  | • Marketing                               | • Improve attitude towards foreigners       |
|                  | • Marketing channels                      | • Investment in world class product         |
|                  |                                          | • Luxury                                    |
|                  |                                          | • More efficient industry                   |
| (6 responses)    |                                          |                                            |
• More productive industry
• Quality and service
(14 responses)

Regional dispersal
• Cities packaging up tours with regional areas
• Domestic travel to regions
• More public transport to regional
(5 responses)

Workforce
• Raise career profiles
• Skilled workforce
• Skills training and retention
(5 responses)

Sustainability
• Capability building
• Capacity Building
• Carbon-Neutral
• Decarbonisation
(8 responses)

Technology
• Automation
• Autonomous vehicles
• Digital
• Digital Marketing; payments; platforms
• Digital transformation
• Electric vehicle networks
• Airbnb
• More digital connection
• New technology
(17 responses)

Unique offering
• Agri-tourism
• Airbnb experiences
• Australian
• Bespoke experiences
• Brand Australia (2)
• Cultural tourism
• Cultural tourism growth
• Cultural Understanding
• Culture
• Develop local arts
• Discover new visitor offers
• Diversify
• Experiences
• Fishing tourism
• Focus on Australian production
• Human connection
• Imagination
• Jetson’s private helicopter type travel
(35 responses)

• Quality assurance
• Service excellence

Regional
• Regional
• Regional Dispersal

Training
• Wage flexibility

Economic growth
• Growth
• Sustainability
• Economy

New technology, employment in new technology
• Seamless technology integration
• Smart Cities
• Technology
• Uber
• UGCs
• Virtual Reality
• Response

Local produce, stories and experiences
• Localism
• Long-tail niche experiences
• More colourful product to meet the different tourists’ needs
• More creativity
• More food and wine in regional areas
• New destination
• New icons
• New markets
• Personalisation
• Personalised experiences
• Re-Imagine
• Sport tourism
• Tailored and customised itineraries
• Understanding cultures
• Underwater tourism
• Unique
**Volun-tourism**
- Citizen science
- Encourage Volunteer Tourism / Philanthropic tourism
- Responsible, conscious tourism

*(6 responses)*

**Other**
- Mindset
- Potential to improve food security
- Japan

*(5 responses)*

- Social Enterprise
- Volunteer
- Volun-tourism
- USA
- Southern Sky
05: Focus Areas

Presented with a list of focus areas and priorities gleaned from recent national and state meetings, discussions and reports on tourism, participants were asked to vote for their top five focus areas via Poll Everywhere.

(Please note: the focus areas presented to each participant evolved from workshop to workshop. Sydney Workshop participants were asked to vote for their top five focus areas from a particular list and then do a ‘deep dive’ into these five. Gold Coast Workshop participants were asked to vote for their top five focus areas from another list and then to do a ‘deep dive’ into their top four priorities. For the Webinar, participants were asked to vote for their top five focus areas from a different list.)

The priorities with the highest votes from the webinar were:

1. Sustainability
2. Regional dispersal
3. Customer experience (visitor-centric)
4. Investment in infrastructure
5. Accessibility (e.g. transport)

Poll Everywhere voting:

Note: A participant who was unable to maintain connectivity to participate in the activity, sent their input of an additional priority to focus on customer data and market segmentation - internationally, nationally and locally.
06: Game Changers

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

Participants were asked to provide their responses to the above question via Poll Everywhere. The focus was on identifying that one game changer, the “silver bullet” that would drive success to 2030. The game-changer ideas were captured and are reported below.

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:

The top five responses were: industry, regional, investment, development and collaboration.

Responses:

Industry
- AI
- Another Sydney Opera house equivalent in Queensland
- Aviation development
- Aviation – with flights on par with Singapore, Australia could be the new hub for Asia and South America
- Digital payments
- Critical thinking
- Experiences
- Good research (2)
- Greater diversification of tourism visitor origin (i.e. reduce the reliance of the Chinese market - to avoid exposure to risk). Look at focusing on emerging markets like Latin America, Middle East and South East Asia
- Human-centred approach
- Inclusivity/accessible travel
- Knowledge of customer drivers & needs/psychographics in different markets (internationally, nationally, locally) & the ability to target them with relevant messages
- Policy
- State-wide digital/social platform
- Technology
- Unique, creative marketing
- Uniqueness

Regional
- Economic growth
- Global economy
- Environmentally sustainable growth of industry
- Pristine natural environment
- Respecting our natural environment
- Supporting tourist locations to handle over-tourism
- Sustainability (2)
- Minimise plastic use

(18 responses)
Investment

- Government funding
- Government investment in tourist attraction infrastructure
- Industry ownership and structure

(7 responses)

Development

- A tourism traineeship that offers student the opportunity to develop skills and meet new cultures in destination around the country and possibly internationally, the bring them back to deliver excellence in regional Australia
- Attracting talent/career development

(7 responses)

Collaboration

- Bi-partisan approach – unified national and state strategy
- China (2)
- Collaboration

(7 responses)

Other

- Data-driven culture
- Accessibility
- Genuine regional dispersal strategy

(5 responses)
07: Summary

The webinar workshop was a demonstration of the valuable contribution that can be delivered by the tourism industry in a short and highly productive workshop format. Taking people out of their normal day to day activities, and immersing them in the thought process of future thinking, and enabling future thinking and creativity.

Webinar participants reflected an external focus with many of the common themes expressed relating to global issues and their potential impact on the Australian tourism industry, and the identification of new and traditional international markets as opportunities. Related to this were comments related to the sustainability of the Australian tourism industry in the face of global economic crises, exchange rates, lower cost international destinations and pandemics.

The training and retention of high quality staff was a key theme throughout the webinar activities. Participants expressed a desire for tourism to be a career pathway rather than a place holder for other professions.

There was a great emphasis on technology and the use of data to understand the customer, tailor tourism experiences and develop unique offerings for the industry of the future. This drive for unique product offering and experiences also came through strongly with many suggestions for Aboriginal products, new sector products and opportunities to tap into responsible and socially aware tourism experiences that were dubbed volun-tourism in this and other workshops.

Participants in the webinar were highly engaged throughout the process and demonstrated a keen understanding of the drivers for change and the role that industry and government play within the sector now and through to 2030.