Tourism 2030 Strategy Consultation Workshop Report - Canberra

For Austrade
September 2019
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01: The 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.

This 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 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 participants in the workshop.

Workshop Structure:

The workshop was structured with five main sessions:

- **Visioning** – what does the future of the tourism industry in Australia look like in 2030?
- **Narratives** – capturing the stories that we tell about the industry now and its impact on people and communities.
- **Challenges & Opportunities** – exploring these within the context of the Report, and identifying areas that may not have been covered in the Report
- **Focus Areas** – 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 ideas, comments and contributions from participants on each in these sessions, generating input to the consultation process. This report is structured as per these workshop sessions.

The workshop ran for 2 hours, from 2pm – 4pm on Friday 20th September 2019, in the Bradman Room at the Manuka Oval in Canberra.
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:

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.

- Competitive pricing, collaborative clear points of difference in international tourism, investment, eco-tourism, skills, states not competing
- Training
- Collaboration, strategy, borderless community, no borders, investment in regional NSW, PR
- Point of difference
- Government support
- Partnerships
- Strategy
- consumer behaviour
- Unique experiences
- Diversity
- Move with the times
- High quality
- Private/government partnerships
- Investment
- Ease of investment
- Access
- Diverse portfolio
- Not prohibitively expensive to get here!
- Critical infrastructure
- career pathways
- Genuine collaboration
- Quality
- Environment
- Investment
- Skilled workforce
- environment
- Willingness to engage
- Hotels
- Consistent
- Access to skilled employees
- Unique experience
- Responsibility
- Level playing field
- Availability is staff
- Investment
- Well managed
- Accessibility
- Interconnected
- Budget
- Quality
- borderless
- Funding
• Existence of the Great Barrier Reef
• Government and industry led
• Diverse opportunities
• Strategy
• Well trained staff
• Affordability
• Skilled
• Collaboration
• Sustainable
• Easy Visa Access
• Highly trained workforce
• Collaboration
• Funding
• Collaboration
• Investment
• Hotels
03: Narratives

Story-telling is a powerful way to articulate not just facts and figures, but emotions, feelings, thoughts and experience. As we look to 2030 the need to preserve the good in what we have, whilst expanding and exploring further the opportunities presented, is key to ensuring that the baseline of the present is understood and considered. In this activity, participants were paired up and asked to share, and document, a story that conveyed the impact of the tourism industry on people and communities.

| Situation | • NMA – Rome exhibition |
| Characters | • British Museum  
• NMA |
| Actions | • ACT Government  
• Federal Government  
• Sponsors and Corp |
| Impact | • $40m economic benefit |

| Situation | • burnt out mountain following bushfires  
• Government put in place community infrastructure – servicing mountain biking and cycling community  
• Now a beloved community facility that also attracts interstate and international visitation. World class facility |
| Characters | • ACT government  
• Cycling community  
• Suburbs/community  
• Tourism community |
| Actions | • Clearing of fire-damaged forest  
• Master planning  
• Construction  
• Event management/promotion |
| Impact | • New community facility  
• Enhanced ACT reputation as a cycling city  
• Attracted events/businesses/investment  
• Good community health outcomes  
• Heal scars of fires |

| Situation | • Ashes to arboretum  
• Burnt to the ground 2003-2004 bushfires  
• Concern about bushfires happening again |
| Characters | • Consultation about the site  
• Community  
• Government (ACT) |
| Actions | • Creating a monument but was created a living museum for the community to visit and engage with |
| Impact | • Created jobs – venue  
• Venues/commercial/tourism attraction  
• Conservation  
• Education  
• Diplomacy – global plenty of these  
• Community engagement activities |

| Situation | • Hayles – Great Adventures in Cairns |
| Characters | • Noel  
• Owner of DreamWorld. |
<table>
<thead>
<tr>
<th>Actions</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Rebranded a “ferry business” – Tourism</td>
<td>• Tourism</td>
</tr>
<tr>
<td>• Employed Marine biologists.</td>
<td>• Broader employment in Cairns</td>
</tr>
<tr>
<td></td>
<td>• More flights to and from Cairns</td>
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<td></td>
<td>• Marine Park tourism – operators assessment helped government</td>
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<table>
<thead>
<tr>
<th>Situation</th>
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<tbody>
<tr>
<td>• 5,000 Poppies – collaborative event/marketing project</td>
</tr>
<tr>
<td>• 100th anniversary of end of WWI</td>
</tr>
<tr>
<td>• Started at community level, developed through social media and spread</td>
</tr>
<tr>
<td>national through local/federal government, War Memorial, APH</td>
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<table>
<thead>
<tr>
<th>Characters</th>
</tr>
</thead>
<tbody>
<tr>
<td>• War Memorial, APH, Airport, VC, Events ACT, CIT</td>
</tr>
<tr>
<td>• Community</td>
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<table>
<thead>
<tr>
<th>Actions</th>
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<tbody>
<tr>
<td>• 62K poppies on WM lawns</td>
</tr>
<tr>
<td>• 100k poppies @ APH</td>
</tr>
<tr>
<td>• Collaborative marketing efforts</td>
</tr>
<tr>
<td>• Collaborative events</td>
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<tr>
<th>Impact</th>
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<tbody>
<tr>
<td>• Tourism (interstate, local)</td>
</tr>
<tr>
<td>• Brand of CBR</td>
</tr>
<tr>
<td>• New relationships/partnerships in gov, international</td>
</tr>
<tr>
<td>• Economic development + $10m</td>
</tr>
<tr>
<td>• Earned media reach</td>
</tr>
<tr>
<td>• Understanding of WWI</td>
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<thead>
<tr>
<th>Situation</th>
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<tbody>
<tr>
<td>• Sri Lanka – tourism and recovery</td>
</tr>
<tr>
<td>• Lack of conflict – peace</td>
</tr>
<tr>
<td>• Beautiful destination product</td>
</tr>
<tr>
<td>• Inbound down: bad publicity</td>
</tr>
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<table>
<thead>
<tr>
<th>Characters</th>
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</thead>
<tbody>
<tr>
<td>• Bad politics vs. peace</td>
</tr>
<tr>
<td>• Turtles</td>
</tr>
<tr>
<td>• Old fashioned</td>
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<table>
<thead>
<tr>
<th>Actions</th>
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<tbody>
<tr>
<td>• Private operators bounce back</td>
</tr>
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<table>
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<tr>
<th>Impact</th>
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</thead>
<tbody>
<tr>
<td>• Inbound numbers up over 10y</td>
</tr>
<tr>
<td>• Investment up</td>
</tr>
<tr>
<td>• Economic benefits up</td>
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</tbody>
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<table>
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<tr>
<th>Situation</th>
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</thead>
<tbody>
<tr>
<td>• Backpacker tax</td>
</tr>
<tr>
<td>• Vital workforce</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Characters</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Industry associations</td>
</tr>
<tr>
<td>• Advocacy to government</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Actions</th>
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</thead>
<tbody>
<tr>
<td>• Tax rate changes to 32% then reduced to 15%</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Tax @ 15%</td>
</tr>
<tr>
<td>• Workforce preserved</td>
</tr>
<tr>
<td>• Tourism Australia $10m campaign</td>
</tr>
<tr>
<td>• Spending/visitation maintained</td>
</tr>
<tr>
<td>Situation</td>
</tr>
<tr>
<td>Characters</td>
</tr>
<tr>
<td>Actions</td>
</tr>
<tr>
<td>Impact</td>
</tr>
</tbody>
</table>

| Situation | • Canberra is home to acclaimed artists, makers, designers who could live anywhere in the world, but choose to live, work, and make in Canberra |
| Characters | • Visit CBR – diversifying product/content beyond national cultural institutions |
| | • ANU School of Art/UC |
| | • Craft ACT |
| | • Nat Cap Authority/City Renewal Authority |
| Actions | • Outward focus, collaboration |
| | • Represented on Tourism Task Force and Tourism leaders forum |
| Impact | • Artist income from $24k to $177k in 3 years |
| | • National publicity of Canberra as a city of design – contrast to politicians, Floriade, NCIs |
| | • Early collaboration between Visit CBR and Craft ACT |
| | • Transformed artists’ practice and careers |

| Situation | • New hotels in city centre – urban renewal |
| | • New jobs |
| | • More vibrant economy – night time |
| | • Restaurants and bars – more exciting at different times of day |
| Characters | • Government and council |
| | • Hospitality industry |
| | • Local residents |
| | • Visitors |
| Actions | • More things to do |
| | • New hotels and restaurants |
| | • Increased activity especially at night |
| Impact | • More exciting, vibrant, and fun place to live, work and visit |
| | • More jobs – more revenue |

<p>| Situation | • Winemakers CBR |
| | • More focused on retail sales |
| | • Started having operators look at wine makers as tourism operator |
| Characters | • Winemakers |
| | • Formerly reluctant to be tourism operators |
| Actions | • Listing on Airbnb |
| | • Creating experiences |
| | • Sharing with other winemakers |
| Impact | • Bringing in new customers |
| | • Improve brand of the wine region |
| | • Building capacity |
| | • Better collaboration |</p>
<table>
<thead>
<tr>
<th>Situation</th>
</tr>
</thead>
<tbody>
<tr>
<td>- No coordinated effort towards enhancing/promoting our great cycle assets to locals and visitors</td>
</tr>
<tr>
<td>- Strategy has brought together local community, business and government to provide collective effort to achieve this goal</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Characters</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Local community – riders/cyclists, small businesses (bike hire/tours)</td>
</tr>
<tr>
<td>- Cycle venues</td>
</tr>
<tr>
<td>- Cycle groups</td>
</tr>
<tr>
<td>- Government agencies, land owners, government that works with small business to be cycle-friendly</td>
</tr>
<tr>
<td>- How to project message to the broader market</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Dialogue! Opportunities to collaborate</td>
</tr>
<tr>
<td>- Actions identified to deliver on strategy goals</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Funding support and promotional benefits now flowing. Trail development!</td>
</tr>
</tbody>
</table>
04: Challenges & Opportunities

Participants were asked to individually brainstorm the challenges and opportunities that they foresee on the journey to 2030, writing them on separate post-it notes. They then posted their ideas and collectively grouped them into themes. The notes below contain the themes as grouped by the participants. The bullet points represent the actual comments written on the post-it notes.

Challenges

Access
- Transport
- Airline access
- Cheap airfares nationally to Canberra
- Flights
- Accessibility
- Cheaper international airfares
- Access to our city

Collaboration
- Collaboration between and within industry, all levels of government
- Lack of collaboration
- Misaligned expectations

Bureaucracy
- Red tape
- Government red tape
- Regulations and legislation
- Risk aversion
- Government barriers
- Federal versus state support

Lack of innovation
- Shared vision
- Vision
- New ideas
- Riding on old concepts of Australian tourism
- Restrictions on fun
- Fresh products and ideas
- Point of difference
- Variety
- Unable to keep pace
- Not being unique
- Mixed messaging
- Branding is not holistic for Australian tourism

Skills and Capability
- Skilled labour
- Lack of skilled workforce
- Skills (skilled workforce)
- Lack of cohesion through the development of industry skills
- Lack of the skills needed

Funding
- Affordable experiences
- Budget
- Funding
- Funding/revenue
- Lack of resources
- Economy
- Global economy
- Investment
- Private investment

Impact on environment and assets
- Over tourism
- Environment
- Visitor fatigue
- Economy
- Resources
- Sustainability
- Care of current assets e.g. Great Barrier Reef

Competition
- Competition
- Clear positioning
- USP
- Competitive offering
- Lack of innovation
- Increased competition
- Competition
- Not being afraid to be different

Infrastructure
- Infrastructure
- Facilities; infrastructure
- Better connected cities

Other Challenges
- Resources
- International and regional impacts
- Communication of the tourism product
- Value: domestic vs overseas
- Consumer spend
- Continuing on the same path
- Commitment
- Staff
- Consistency
Opportunities

Markets
- International conferences
- China
- Increased international movements
- International tourism growth internat.
- Broaden access to Canberra
- Increase travel markets
- Inbound markets
- Diversify markets
- Tap into new markets that don’t know about us
- Visitation from new markets
- Lots of available land – nature-based activities

Collaboration
- Supporting the industry
- Small but connected
- Collaboration
- Desire for public/private partnerships
- More unique touring exhibitions
- Greater government/private connections

Products
- Better products
- Improved products
- Collaborative marketing
- Unique culture
- Uniqueness
- Unique experiences across Australia for tourists
- Clear vision objectives
- Branding clear vision nationally
- National Collections
- Broader offerings to engage
- Redefining the visitor economy
- Unique landscape
- Creativity
- Unique
- Creation of exciting/unique experiences
- Lots of creative thinkers in industry
- Natural beauty
- Eco-tourism
- Australia the destination
- Nature and more product

Arts & Culture:
- Wine and food
- More Broadway musicals
- Arts and culture

Unique Selling Point (USP)
- Innovation
- Reimagine the now
- Benchmarking internationally
- The next generation of ideas

Access
- Nationwide network of Indigenous infrastructure
- Improved infrastructure
- High speed rail
- Government collaborating
- Investment in infrastructure
- Transport nationally
- Funding priorities
- Ease and speed of travel

Education
- Education
- Education capital of Australia
- Promote international education and other key industries

Other Opportunities
- Improved perceptions
- Virtual AI
- More affordable hotels
- Convention market
- Highlight our indigenous culture
- 24hr media
- Technology and reach
- Untapped expertise and assets
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. The resulting top five overall were the focus areas that participants were able to deep dive into, capturing their inputs to a series of prompting questions.

The priorities voted on for the Canberra workshop are as per the below, and the focus areas used in the activity were:

- Transport and access
- Investment into quality infrastructure
- Emerging opportunities in marketing
- Enhancing digital tourism
- Environmental sustainability

**Poll Everywhere voting:**

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emerging opportunities in marketing</td>
<td>15%</td>
</tr>
<tr>
<td>Investment into quality infrastructure</td>
<td>13%</td>
</tr>
<tr>
<td>Transport and access</td>
<td>14%</td>
</tr>
<tr>
<td>Visa and passenger facilitation</td>
<td>4%</td>
</tr>
<tr>
<td>Growing and diversifying source markets</td>
<td>6%</td>
</tr>
<tr>
<td>Enhancing business capability</td>
<td>4%</td>
</tr>
<tr>
<td>Ensuring a suitably skilled workforce</td>
<td>6%</td>
</tr>
<tr>
<td>Providing robust data</td>
<td>6%</td>
</tr>
<tr>
<td>Enhancing digital tourism</td>
<td>8%</td>
</tr>
<tr>
<td>Regional dispersal</td>
<td>8%</td>
</tr>
<tr>
<td>Catering to accessibility requirements</td>
<td>8%</td>
</tr>
<tr>
<td>Environmental sustainability</td>
<td>8%</td>
</tr>
<tr>
<td>Supporting business to take up new technology</td>
<td>8%</td>
</tr>
<tr>
<td>Working with communities and social licence to operate</td>
<td>8%</td>
</tr>
<tr>
<td>Macro issues – global economic factors, currency fluctuations etc</td>
<td>8%</td>
</tr>
<tr>
<td>Building industry resilience</td>
<td>8%</td>
</tr>
<tr>
<td>Community and local residents – impact, involvement</td>
<td>8%</td>
</tr>
<tr>
<td>Improve workforce productivity and professionalism</td>
<td>8%</td>
</tr>
</tbody>
</table>

The prompting questions provided for each group, at each focus area were:

- Describe this focus area
  - What does it mean to you?
  - What are its core elements?
- What is important about it?
- What impact does/can/will it have on the Tourism 2030 strategy?
- Ideas / Opportunities / Issues / Risks
  - How can this focus area be improved, developed, expanded or mitigated and minimised?
- Ownership / Advocacy
  - What is the role of Industry in this focus area?
  - What is the role of Government in this focus area?
- Other: what else should be considered?
Environmental Sustainability

- What does this mean to us:
  - Leaving a good legacy
  - Addressing climate change
  - Protecting our USP/physical assets
  - Eco tourism
  - Local initiatives and engagement
  - Link “sustainability” to broader definition of sustainability – triple bottom line of environment, social, economic/financial
  - Net zero effect on environment
- Conservation and understanding through access and engagement
- Cost oversight and audit

Controlled access to enhance reputation and desire to visit
- Impact on 2030 strategy:
  - Over visitation
  - Preserving physical assets critical to strategy: tourism, visitation, SR, ROI
  - Improving access – innovation and tech, e.g. mobile phone access, broadband, WIFI
- Ownership/Advocacy:
  - Shared vision/responsibility across all levels
  - Collaborative industry and government

Investment in quality infrastructure

- Public/private
- Future focus/ make most of what we have
- Enables other opportunities
- Improves visitor experience
- Better connectivity
- Opens access to other markets
- More reasons to visit and engage
- New investment = jobs, skills
- Innovation for assets to keep market share and benchmarking

Government proactive, encouraging investment
- Competitiveness
- New ideas/innovation/digital
- Encourage risk-taking
- Government facilitator/leadership: funding, vision, policy
- Political relevance
- Investment expensive in Australia
- Australia challenging and expensive to get around

Transport and access

- Better experience – more people can have it
- Increase growth targets, visitor metrics in revenue
- Partnership approach, strong government vision +funding + industry support
- Prioritising - best value and communication
- Small/dispersed Australian population difficult to achieve ROI
- Access to communication technology: wireless, WIFI, mobile, 4-5G
- Wages impact on access
- Access to and around a destination:

Rail, air, buses, taxis, Uber, cycling, walking (safe and easy connections)
- Frequency of signage, wayfinding, disability access and inclusion, affordability
- Consistency with transport passes across states and territories – i.e. not mixed private/government etc.
- Enables people to visit, disperse, enjoy more of their experience, maximise their time, plan better, manage expectations, including international expectations

Enhancing digital tourism

- Google Glass 2
- AR, VR, AI
- Tailored content
- Audio tours
- Translation tours (live)
- Partnerships
- Digital as an enabler
- Focus on unique selling points (USP)
- Digital solutions to break down barriers
- Adding to in destination experience
- Breaking down barriers

Enhance visitor experience
- Interact with more visitors
- Streamlining
- Skills for the workforce to deliver experience
- Models: Space @ NMA
- Must ensure it motivates travel not replace
- Capability of business owners
- Knowledge and awareness
- Innovation in use of digital tech to enhance an in destination experience
Emerging opportunities in marketing

- More segmentation
- Data and analytics
- Investment
- National collaboration
- Education
- Personalisation of messages
- Both physical and digital marketing
- Focus on unique selling points (USP)
- Advocacy
- Clear communication

- One form of communication doesn’t replace another – it adds
- Innovative branding opportunities
- Development of product
- Tailoring and experiences for audience
- City pass – one stop shop
- Breaking down silos
- Brand vision holistic: business, recreational
- National brand, based on products
06: Game Changers

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

In groups, participants were asked to brainstorm their responses to the above question. 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.

Game Changers:

- **International**: improve visa programs and accessibility
- **Domestic**: improve accessibility and connectivity, for example rail
- **Immigration reform to address skills shortage**
- **Sort out domestic like travel experiences**, similar to New Zealand
- **Nationally connected indigenous product and experience**
- **National indigenous story and cultural becomes part of everyday experience**
- **Collaboration**: National industry; Policy; Marketing messages; Resources; Vision; Marketing; Not have state by state agendas; work to national vision based on USP of each state/territory; Investment; Transport/flight paths
- **Technology**: Australia is a large geographic country using tech innovatively and improve transport
- **One national unified brand everyone is committed to**, e.g. 100% pure; executed locally, regionally, state-based, ties into overarching uniform brand
  - Evolving campaign
  - Different levels of buy in and participation (flexibility to accommodate resourcing/workforce)
- **Sincere steps towards Indigenous reconciliation**
  - Supports USP
  - NZ a great example of how culture is embedded authentically and respectfully
- **No borders** – a barrier for collaboration and innovation
- **Hero experience/asset** e.g. D’Arenbergs Cube in McLaren Vale, The Birds Nest in Adelaide Hills
- **Cultural awareness** e.g. NZ as the example, sincere steps towards reconciliation
- **No more borders** – borderless communities
07: Summary

The workshop was a demonstration of the valuable contribution that can be delivered in a few hours of collaborative discussion and innovative thinking. 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.

The participants clearly articulated their desire for stronger collaborative links between government departments involved in the Tourism industry, as well as within the industry itself. Advocacy and ownership were explored and discussions frequently turned to private-public partnerships and collaborations.

Participants 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. Canberra was particularly noted for the lack of traditionally iconic tourist attractions, but there was confidence that what Canberra and the region had to offer could be uniquely positioned.

Sustainability, affordability and access were the key themes repeated throughout the session. They were concepts applied to many varied aspects that the participants explored, and continually came to the fore as key critical factors to future success.