Tourism 2030 Strategy Consultation Workshop Report - Darwin

For Austrade
October 2019
# Contents

01: The Workshop .................................................................................................................. 3
02: Visioning – “Into the future … 2030” ........................................................................ 4
03: Narratives .......................................................................................................................... 6
04: Challenges & Opportunities ............................................................................................ 11
05: Focus Areas ...................................................................................................................... 14
06: Game Changers ............................................................................................................... 17
07: Summary .......................................................................................................................... 18
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 23 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 10am – 12pm on Thursday 3rd October 2019 in the Northern Australia Development Office, Darwin. Participants from Alice Springs were dialled in over the office teleconference technology.
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.

- Ease of access to the territory
- Aviation access,
- Strong, focused direction, industry working together
- Technology
- Airlines routes - need more international access
- Infrastructure
- Accessibility
- Promoting tourism industry and mentoring youth
- Quality
- Quality product
- Destination Marketing
- Reduction in red, green & black tape
- Successful marketing campaign
- Transport
- Sustainable rates
- Staff retention
- Sustainable industry and businesses
- Unity planning strategy quality diligence
- Product and people
- Aviation access
- Focus on quality
- United marketing programs
- Planning
- International destination awareness building activities
- Unique landscape and people
- Year-round destination
- Renewed product
- Environmental strength
- Unique and special experiences
- Quality of experiences
- Sustainability
- Reduce red tape
- Consistent level of government funding
- Online presence
- Workforce
- Awareness
- Clean environment
- Education
- Capability
- Cost of access
- Strategic planning
- Collaboration
- Product
- A decent airline experience
- Money
- Training
- Accessibility

- Training a strong industry workforce
- Quality of Product
- Unique Experience
- Industry collaboration
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
- Jetstar Asia boosting leads into Darwin ex Singapore
- Lack of awareness of events in NT
- Sponsor Darwin for the first time of a festival

### Characters
- Qantas Group OS
- Tourism bodies working closely with Airlines to market event and sales activities
- Major sponsor – CEO of airlines and marketing manager

### Actions
- Driving awareness of Darwin events and addressing misconceptions in market
- Increase awareness of NT marketing campaigns
- Attended festival and showcase Darwin over 2 days

### Impact
- Plan for focussing on events and targeting inbound through marketing initiatives
- Completely addressed misperceptions and strengthened relationship significantly

### Situation
- Operating in Kakadu

### Characters
- Supplier in Kakadu (GM’s)
- Warrondon cultural centre
- Visitor centre
- YMBC – cruise operators

### Actions
- Focus on product and quality
- Improved product and staff retention

### Impact
- Positive vibe in Kakadu
- Helping to give constant employment into the region
- Seeing the ongoing benefits of this

### Situation
- Waterfront development
- Oil tunnels from WW2 at Stokes Hill wharf
- Site master planned to incorporate convention centre, hotels, wave pool/lagoon, restaurants, residential apartments etc.
- Built through collaboration between government (NIS), private sector development

### Characters
- NT government/waterfront corporation to land owner and manager
- Toga – original developer
- AEG Ogden – convention centre owner
- Small businesses – run individual enterprises (restaurants)
- Community and visitors – users of site

### Actions
- Old underused site transformed into arguably the best, more engaging site near the Darwin CBD, bringing a quality product for visitors and residents alike

### Impact
- Community activity and engagement
- Significant business events attracted
- New hotels
- Energised site
<table>
<thead>
<tr>
<th>Situation</th>
<th>Sporadic, inconsistent ferry services to Tiwi islands</th>
</tr>
</thead>
</table>
| Characters | Vessel/marine crew  
|           | Art centre staff – artists  
|           | Visitors |
| Actions   | Developed a day tour in partnership with local (Tiwi) art centre  
|           | Sealink NT commenced operation of ferry services to the Tiwi Islands in 2013, operating 3 times per week, year round |
| Impact    | Increased visitor numbers each year  
|           | Art centre capacity increased  
|           | Full-time employment increased on Tiwi Islands  
|           | Economy increased – tour and art sales  
|           | Demand increased – additional services added |

| Situation | Global week of service activities  
|           | Worldwide company, expectation of social responsibility  
|           | Volunteering, community service work, Goodwill school  
|           | Meaningful cover opportunities to certain groups |
| Characters | New employees – giving them a foot in the door  
|           | Team member: opportunities to give back |
| Actions   | Provided insight to our industry, developed a career path  
|           | Less privileged benefited |
| Impact    | Team member retention  
|           | Feel valued, add value |

| Situation | Provide local employment  
|           | Special programs for training  
|           | Development plans for team members  
|           | Use local suppliers and services  
|           | Hire local talent to get away from workforce based on back packers  
|           | Offer growth plans in destination to keep global talents |
| Characters | HIZ  
|           | Local organisations  
|           | GM |
| Actions   | Offer development plans to local talent  
|           | Create workplace for team members in destination |
| Impact    | Team retention and motivation |

| Situation | Injalak Arts Tour (now closed)  
|           | Gunbalanya NT – Arnhem land  
|           | Land council permit required  
|           | Getting across Cahills Crossing – tidal  
|           | Meeting up at arts centre and introduced to local guide  
|           | Guide takes you up Injalak Hill |
| Characters | Manager of arts centre  
|           | Local indigenous tour guide  
|           | Land council for permit  
|           | NTG + AG for funding and support |
| Actions   | Run the centre and programs  
|           | Provide authenticity to experience  
|           | Facilitate access  
|           | Support the centre and the community |
### Impact
- Authentic cultural experience
- Holiday highlight
- Positive word of mouth endorsement
- Increased community resilience and pride
- Hopefully reopens soon!

### Situation
- Kakadu National Park (KNP)
- Declining assets
- Reduced access
- Increased red and green tape
- Flailing leadership
- Croc’s increased

### Characters
- KNP management confronts park access and purse
- TO’s own land – want development and sustainability
- Tour/hospitality operators – certainty, access
- Crocs continued increased access

### Actions
- 10 years neglect
- Continued croc numbers reduced some activities
- Parks closing sited to reduce risks

### Impact
- Decline in operators and offerings
- Reduced visitation impacting greater top end
- Loss of major draw card

### Situation
- Challenging economic environment
- Seasonality
- Micro business
- Kakadu
- Clients closure

### Characters
- Mick Burns
- Darren Lynch
- Chris Hill

### Actions
- Diversified
- Invested
- Innovated

### Impact
- New products
- New experiences

### Situation
- Not for profit, supporting a local support network
- Annual events
- Jumpers – “one” in particular utilising tourism network to promote a great local cause

### Characters
- Canteen, charity
- Sky diving – supportive, ongoing
- Resort
- Locals
- NT Mayor events/Tourism NT

### Actions
- Annual event incorporating 12-16 local high profile people
- Agreeing to jump out of a plane and fundraise
- Promotional activity, linked to Tropical Lights – thank you Kathy
- Finally looking better than usual

### Impact
- Incorporated into the new Tropical Lights promotion
- Giving much higher profile than previous years
- Final still to be determined
| Situation | High turnover industry  
| Training not engaged and aligned to industry needs  
| Delivery of training currently aligned to funding models, not industry need |
| Characters | High-school aged students |
| Actions | Collaborate with industry groups and industry |
| Impact | High turnover workforce  
| Poor quality/service  
| Unaccredited workforce |

| Situation | Cancellation of flight sectors |
| Characters | Qantas |
| Actions | Cancellation of direct flight sectors or reduction |
| Impact | 2 cancelled series for 19/20  
| Multi groups changing overnight  
| Some groups unable to secure flights or accommodation  
| Outcome – lost money for ASP |

| Situation | Hot springs  
| Pop-up café  
| New business |
| Characters | Rocket Café  
| Council  
| Tourists and locals |
| Actions | Council supported service  
| Successful – financial, tourism, employment |
| Impact | Others copied – x2  
| Locals and new service  
| Tourism experience  
| Part of greater present |

| Situation | Uluru climb closure – 26 October  
| Driving massive growth in numbers |
| Characters | Parks Australia  
| Local t/o group  
| Voyages  
| Other commercial operators |
| Actions | Climb closure announced  
| Spike in bookings and visitors  
| Service providers under significant pressure |
| Impact | National debate – media focus |

| Situation | Central Australia  
| Summer; Hot/Dry/Dusty  
| Few sealed roads  
| Magnificent ancient landscapes |
| Characters | “Bob” mid 30’s from town in UK  
| Feeling like exploring |
| Actions | Looks at map  
| Easy drive on an unsealed road to old gold fields  
| Get bogged in dry river bed  
| Not used to the hubs on 4WD |
**Impact**
- Survived (but not everyone does)
- Lessons learnt for next adventure
- Importance of preparation

**Situation**
- Desert Song Festival
- Relationship with Soweto Gospel Choir
- Daughter enrolled at piano lessons

**Characters**
- Piano teacher Susie
- SGC time donation
- Morris – developed relationship (DSF)
- Daughter – likes music and performance

**Actions**
- 3 ½ hour workshop
- Choir

**Impact**
- Opportunities open in the NT
- Inspired my daughter to keep going – music and performance
- Successful festival with big crowds to SGC performances
- Proud parents – made the right move

**Situation**
- “Sporting events” in AS – Redback and Easter in the Alice (events)
- Camping experience of West Mac’s and being able to share the same with most people from my community

**Characters**
- Companies across the Alice Springs come together – corporate challenge
- National MTB athletes coming down

**Actions**
- Friendly competition

**Impact**
- Exposure
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

Quality
- Quality of the product (2)
- Tourism products need development
- Competitive
- Increased comfort
- Global destination competitors
- Competition
- Increased competition

Air, Access and Our Roads
- Access
- Aviation access and flights
- Air access/cost (2)
- Local transport or lack
- Transport access
- Road infrastructure
- Consistent funding for tourism
- Flight cost
- Lack of and cost of aviation access
- Distance
- Fuel cost
- Parts availability
- Dispersion
- Public transport

Social Media
- Safety – media reports
- Negative social media
- Social media
- Man cave phenomena
- Community opposition to big projects
- Crime
- Threat of terrorism
- Safety
- Technology

Perception
- Addressing misconceptions
- Destination perception
- Perception
- Tape – red, green, black

Seasonality
- Seasonality (4)

Events Coordination
- Crowded events schedule
- Circuses
- Cannibalisation of events

Market Competition
- Choice – global competition
- Competition
- World competition

Workforce
- Lack of travel experienced staff
- Access to technology
- Workforce

Government/Industry Advocacy
- Funding
- Recognition of value of industry
- Funding future for NT
- Vision of Government
**Other**

- No shopping for tourists
- Limited service mind
- Run down facilities in National Parks
- Costs
- Lack of destination awareness (2)
- Access to translators
- Disrupting popups – Uber Eats and Airbnb
- Policy
- Own supply off-season accommodation
- Seasonal
- Access
- Talent pipeline
- United voice
- Consistent strategy
- Workforce retention
- Workforce development

- Workforce challenges
- Remote location
- Visas – cost
- Visas
- Quality of product
- Staff retention
- Professionalism – training
- Roads
- Competitive market
- Tired product
- Luxury product
- Quality
- Cost of providing service in remote region
- Customer service (poor)
- Communications – Wi-Fi, phones
- Education/awareness of events

**Opportunity**

**Industry Collaboration**

- Industry engagement and collaboration
- Strong collaboration – Government and industry
- Agreed long-term industry plan
- International marketing campaigns
- More positive messages on social media
- United communicators
- Continuation of business events support fund

- Business event growth opportunity
- Less barriers to growth
- Collaboration partnership
- Support by government
- Industry advocacy
- Partnership
- Collaboration between industry groups

**Unique**

- Unique
- Unique culture
- Create something unique and create a must visit destination
- Unique landscape

- Nature
- Maximise pristine environment
- Natural assets – national parks
- Clean up Darwin to improve image

**Authenticity**

- Authenticity (3)

**Transport**

- New aircraft – cheaper to run
- New transport routes
- More direct flights – more international connections

- Fly/drive
- Local living knowledge
- New technology

**Investment**

- Development of Kakadu (funding)
- New and original products

- New adventure activity – bring back youth
- Product growth

**New Product – Adventure**

- RCAR
- Kakadu

- Business events in aviation cost can reduce
- Growth and new treks
**Aboriginal Tourism**

- Aboriginal tourism
- Aboriginal culture – living, increasing interest
- Aboriginal employment and engagement
- Development of Indigenous tourism experiences
- Indigenous product development
- National Aboriginal art gallery
- Connecting with Aboriginal culture
- Language

**Other**

- Expenditure
- Technology
- Increased communication
- Restore access to key sights
- Development
- Less prohibition – legalisation
- Local/close Asian markets i.e. Indo/Singapore/China
- Access hub to Asia
- Frontier ‘can do’ attitude
- Digital translation apps on major sites
- Events promotion – annual calendar
- Additional major festivals year round
- Population growth
- Accessible tourism
- Ongoing local chapter for professional tourism organisation – MEA, etc. (with high student populations and industry support)
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 workshop are as per the below, and the focus areas used in the activity were:

- Transport and access
- Investment into quality infrastructure
- Ensuring a suitably skilled workforce
- Regional dispersal

Poll Everywhere voting:

- Emerging opportunities in marketing: 4%
- Investment into quality infrastructure: 11%
- Transport and access: 1%
- Visa and passenger facilitation: 4%
- Growing and diversifying source markets: 7%
- Enhancing business capability: 9%
- Ensuring a suitably skilled workforce: 1%
- Providing robust data: 4%
- Enhancing digital tourism: 9%
- Regional dispersal: 5%
- Catering to accessibility requirements: 8%
- Environmental sustainability: 3%
- Supporting business to take up new technology: 4%
- Working with communities and ‘social licence’ to operate: 3%
- Macro issues – global economic factors, currency fluctuations etc: 4%
- Building industry resilience: 5%
- Community and local residents – impact, involvement: 3%
- Improve workforce productivity and professionalism: 4%

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?
Transport and Access

**Description**
- Price
- Routes/availability-frequency/choice
- Perception
- Reliability
- Transport/access is no. 1 tourism enabler
- Getting people out of gateways

**Role of:**
- **Industry:** advocacy – TCA
- **Government:** Listen, regulation, fund

**Importance**
- Key factor for transportation – Air access only
- Road important on ground
- Marine Routes – roads not always accessible (coastal tourism)

**Ideas/Opportunities/Risks**
- Investment/lobbying – planning for new routes
- Population growth
- International destination awareness and increased demand
- Aids dispersal
- Length of stay
- Safety of travel
- Better product availability

**Ownership/Advocacy**
- Total picture – airlines/hotels/hospitals
- Government must fund infrastructure
- Local community

Investment into Quality Infrastructure and Product

- Means overcoming small product range and narrow offering
- Renewing tired product
- Promotional opportunity – new product or infrastructure
- Important as drives demand, to achieve 2030 targets
- Needs: funding, agreed plan, availability of land, ownership by industry
- SME/financial assistance for investment and cut red tape
- Large corporation (i.e. long-term loans)
- Structured plan with specific/proposed timeline and conveyed to industry
- New product creates interest/positive message

**Role of:**
- **Industry:** Investment
- **Government:** Investment

Suitably Skilled Workforce

- Local employment opportunities
- Smooth visa pathways for international workforce
- Customer focused industry
- Critical – business performance implications (bottom line)
- Career pathways
- Need to offer top service – competing against destinations where service is amazing
- Staff retention
- Training cost
- Flexible visa system
- Capability
- Youth diversion program
- Quality
- Pathways & Skill sets

**Improve**
- Locals – language skills, schools VET, job seekers (conflict)
- Better industry involvement

**Own**
- Convenience, cost, ease, accessibility
- Development of outback accessibility

**Investment into Quality Infrastructure and Product**

- Enable visitor dispersal
- Enable growth and development of new product
- Roads
- Industry JV in government for product
- Aboriginal development
- Communications
- Long-term sustainability
- Big attractions
- Address visitor needs
- Broad employment

**Role of:**
- **Industry:** Investment
- **Government:** Investment

**Ownership**

- Fund memberships for attendance and development (10 national workshops) for students and local professionals and memberships (scholarships)
- Associations e.g. service skills Australia, AHA, Catering Australia and RTOs e.g. CDU
- Awareness of job progression is more sustainable/faster/more opportunities in the NT
- Investment = sustainable/growth in population in workforce

**Role of:**
- **Industry:** Provide opportunities, on the job training, apprenticeship, investment, training needs
- **Government:** Funding models – regionalise, visa advocacy
Regional Dispersal

- Increased employment opportunities – transport, accommodation, attractions, awareness, destination
- Economic development
- Road critical – less so aviation
- Not just a focus on Sydney (move beyond gateways)
- Ability for national strategy to deliver local outcomes at odds with other jurisdictions
- Growing regions require investment in infrastructure, to a standard commensurate with capital cities
- Work within our limitations/recognise our potential rather than looking at others (capital cities) – focus on ourselves! Keeping positive but think realistic.
- Sealing roads
- Community airstrips
- Visitor information services
- Connectivity
- High sustainability capacity
- Improve visitation to all areas
- Decision making

Role of:
- **Industry:** Connectivity, services, investment
- **Government:** Regulation, Funding
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:

- **Replicate integrated resort style development at Yulara**
  - Hotels: various star ratings
  - Airport
  - Infrastructure
  - F & B
  - Activities

- **Market position our destination + themes globally i.e. Indigenous – coastal**
  - Increased access – open up Arnhem Land
  - Become No. 1 in global tourism sustainability
  - Develop a MAJOR indigenous cultural festival
  - Change perceptions around access/permits to Aboriginal land

- **Population growth**
  - Investment in infrastructure and product
  - Access improvement (air, road, cruise, rail)
  - Leading with our HERO product – Aboriginal culture
  - Upgrade IT and connectivity
  - Increased awareness of NT – national and international

- **Reducing the length of the shoulder season**
  - Unique destination hook – amusement park, attraction – Kakadu

- **HAAG in/walking distance to CBD**

- **Mereenie Loop – sealed**

- **Alice Springs CBD – safety/attractiveness**

- **Data availability**

- **Social change including respect for Aboriginal culture**

- **Collaboration/innovation in training – hotels/transport etc.**
  - Cultural based experiences – authenticity
  - Outback way/outer Mereenie Loop
  - Invigorate the ‘old’ product and other historic product
  - Technology based augmented reality
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.

During the course of discussions, the main point emphasised by the attendees was the cost and time required to reach Darwin from other major urban centres in Australia. Air and road were both perceived to be prohibitive methods of access for visitors. Suggestions made by participants included that airlines use new aircraft to run more direct flights to Darwin and Alice Springs in order to improve access and reduce prices.

The Northern Territory's most attractive features that attract tourists, according to the participants, are its indigenous history and unique natural landscapes such as Uluru and Kakadu. While infrastructure and access were concerns given the remoteness of many historic and significant sites, participants were confident that development and funding to these areas would encourage more visitors.

Access and infrastructure were clear themes throughout the various discussions and activities. Participants were passionate about their industry and the future potential and opportunities.