Tourism 2030 Strategy Consultation Workshop Report - Devonport

For Austrade
October 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 47 attendees at the workshop, as well as the Assistant Minister for Regional Tourism, Senator the Honourable Jonathon Duniam.

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 2:30pm – 4:30pm on Monday 21st October 2019, in the Paranaple Convention Centre at Market Square in Devonport.
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.

- Collaboration (12)
- Investment (10)
- Product development/New product (5)
- Funding (4)
- Local Government (4)
- Government support (4)
- Access (3)
- Education (3)
- Community buy in (2)
- Customer focused (2)
- Infrastructure (2)
- Strategy (2)
- Diversified markets
- Numbers
- Economic conditions
- Unity
- Commitment
- Service economy
- Financial security
- Services
- Focus
- Differentiation
- Research
- Communication
- Journey
- Visitor economy thinking
- Marketing
- International visitors
- Experience development
- Remove political borders
- People power
- Diversity
- Working together
- Visitor economy
- Authenticity
- Global safety
- Money
- Community buy-in
- Resilient communities
- Local
- Experience
- Customer focussed
- Government
- World class experiences
- Community
- Access
- Products
- Education
- Integration
- Access
- Flights
- Cross government priorities
- Circular economy
- Inclusion
- Community engagement and acceptance
- One Australia team
- Transport
- Dispersal
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 | $20 million state funding, $500 thousand Tourism Demand-Driven Infrastructure (TDDI) funding to redevelop Kalbarri National Park, in Western Australia’s Midwest, 6 hours north of Perth  
Kalbarri is an 80’s tourism town, now in decline  
Just sealing the 22km of National Park road has increased visitation to Kalbarri by 30% - the dual skywalk over gorge is opening in March 2020.  
Old, tired accommodation having reinvestment, new owners moving into cafes. |
|---|---|
| Characters | Parks Agency  
Tourism Agency  
Industry |
| Actions | Used Fed Government TDDI monies to make State Government priorities  
$20m (Royalties funding) to get federal funding.  
Parks Agency had the plans for Kalbarri National Park in the pipeline, which was just waiting for funding. |
| Impact | 30% growth in visitation to National Park (will grow more once skywalk open)  
Hope in Kalbarri – encouraging industry to reinvest in tired accommodation and food and beverages  
Coach touring industry is now adding Kalbarri back into itineraries, booking groups overnight into motels. |

| Situation | Salamanca Market  
Incubator  
Large number of small businesses  
Collaboration between small business and local government for 40 years  
Maker, designer, grower  
‘Meet the maker’ experience for customers to tell the story |
|---|---|
| Characters | Small operators  
Regional  
Local government  
Visitor |
| Actions | Local government acts as custodian and manager  
Curation  
Security  
Marketing |
| Impact | Over 300 stallholders  
Most popular attraction  
Economic multiplier  
Brand: Hobart/Tasmania  
Jobs |

| Situation | Dark Mofo Festival  
Artistic-cultural experience, embraced by community who take pride in weirdness. |
|---|---|
| Characters | Government  
Museum of Old and New Art (MONA)  
Community  
Registered training organisations/Tourism Tasmania  
Tasmanians |
<table>
<thead>
<tr>
<th>Actions</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Locals taken along on a tourism journey.</td>
<td>• Become a celebration of Tasmanian identity</td>
</tr>
<tr>
<td></td>
<td>• Community embracing tourism</td>
</tr>
<tr>
<td><strong>Situation</strong></td>
<td><strong>Impact</strong></td>
</tr>
<tr>
<td>• Bonorong Wildlife Sanctuary</td>
<td>• Better awareness of animal welfare effort</td>
</tr>
<tr>
<td>• Injured animals need help.</td>
<td>• Animals are cared for/rehabilitated</td>
</tr>
<tr>
<td>• Volunteers supporting animal welfare</td>
<td>• Community behaviour/volunteer engagement</td>
</tr>
<tr>
<td>• Visitor engagement/experience of animal welfare</td>
<td>• Airport campaign – visitor education</td>
</tr>
<tr>
<td><strong>Characters</strong></td>
<td><strong>Impact</strong></td>
</tr>
<tr>
<td>• Greg Irons</td>
<td>• Created a demand driver for the region that is world class.</td>
</tr>
<tr>
<td>• Vets</td>
<td></td>
</tr>
<tr>
<td>• Volunteers</td>
<td></td>
</tr>
<tr>
<td><strong>Actions</strong></td>
<td><strong>Impact</strong></td>
</tr>
<tr>
<td>• Injured wildlife</td>
<td>• Better awareness of animal welfare effort</td>
</tr>
<tr>
<td>• Visitors learn</td>
<td>• Animals are cared for/rehabilitated</td>
</tr>
<tr>
<td>• Visitors invest in animal welfare – money and good habits.</td>
<td>• Community behaviour/volunteer engagement</td>
</tr>
<tr>
<td>• Volunteers</td>
<td>• Airport campaign – visitor education</td>
</tr>
<tr>
<td><strong>Situation</strong></td>
<td><strong>Impact</strong></td>
</tr>
<tr>
<td>• Marketing campaign about meeting local characters and what they do</td>
<td>• It raises the bar.</td>
</tr>
<tr>
<td><strong>Characters</strong></td>
<td><strong>Impact</strong></td>
</tr>
<tr>
<td>• ‘The rain farmer’</td>
<td>• It raises the bar.</td>
</tr>
<tr>
<td>• ‘The fisherman’</td>
<td></td>
</tr>
<tr>
<td>• ‘The tour master’</td>
<td></td>
</tr>
<tr>
<td><strong>Actions</strong></td>
<td><strong>Impact</strong></td>
</tr>
<tr>
<td>• Visitors want to meet a local</td>
<td>• It raises the bar.</td>
</tr>
<tr>
<td>• Shows how friendly and warm the people are</td>
<td></td>
</tr>
<tr>
<td><strong>Situation</strong></td>
<td><strong>Impact</strong></td>
</tr>
<tr>
<td>• Video story of individuals</td>
<td>• Created a demand driver for the region that is world class.</td>
</tr>
<tr>
<td>• Wine region needs visionary project to differentiate project and cellar door.</td>
<td></td>
</tr>
<tr>
<td>• D’Arenberg cube – put it on the map, differentiated from other cellar doors.</td>
<td></td>
</tr>
<tr>
<td>• Project causes flow on to other areas due to increase in visitation.</td>
<td></td>
</tr>
<tr>
<td><strong>Characters</strong></td>
<td><strong>Impact</strong></td>
</tr>
<tr>
<td>• SA Winery</td>
<td>• Created a demand driver for the region that is world class.</td>
</tr>
<tr>
<td>• D’Arenberg cube.</td>
<td></td>
</tr>
<tr>
<td><strong>Actions</strong></td>
<td><strong>Impact</strong></td>
</tr>
<tr>
<td>• Made a different cellar offering.</td>
<td>• Created a demand driver for the region that is world class.</td>
</tr>
<tr>
<td><strong>Situation</strong></td>
<td><strong>Impact</strong></td>
</tr>
<tr>
<td>• Mountain biking in Derby, Tasmania</td>
<td>• Social and economic benefits to local community (increased jobs and revenue)</td>
</tr>
<tr>
<td>• Local government support/vision</td>
<td></td>
</tr>
<tr>
<td>• Built pride among community</td>
<td></td>
</tr>
<tr>
<td>• Increased retail benefits for local community</td>
<td></td>
</tr>
<tr>
<td>• Jobs</td>
<td></td>
</tr>
<tr>
<td>• Inspiration to other parts of Tasmania/Australia</td>
<td></td>
</tr>
<tr>
<td><strong>Characters</strong></td>
<td><strong>Impact</strong></td>
</tr>
<tr>
<td>• Local government provided vision, commitment, resources</td>
<td>• Social and economic benefits to local community (increased jobs and revenue)</td>
</tr>
<tr>
<td>• Private sector: existing operators and start-ups</td>
<td></td>
</tr>
<tr>
<td>• Local community</td>
<td></td>
</tr>
<tr>
<td><strong>Actions</strong></td>
<td><strong>Impact</strong></td>
</tr>
<tr>
<td>• Had a vision, and planned and lobbied for it. Saw the opportunity and developed new products/services.</td>
<td>• Social and economic benefits to local community (increased jobs and revenue)</td>
</tr>
<tr>
<td>• Became advocates; are employed in tourism jobs and broader visitor economy.</td>
<td></td>
</tr>
<tr>
<td>Situation</td>
<td>Brisbane floods cut off access for tourists</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Characters</td>
<td>Transport for Queensland, Tourism Australia, Local businesses, Tourists</td>
</tr>
<tr>
<td>Actions</td>
<td>Understanding, Tolerance, Marketing campaigns to get back tourists</td>
</tr>
<tr>
<td>Impact</td>
<td>Recognition</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Situation</th>
<th>Mountain biking: Derby vs. Maydena, Wild Mersey Mountain Bike project</th>
</tr>
</thead>
<tbody>
<tr>
<td>Characters</td>
<td>State funding, Councils, Community</td>
</tr>
<tr>
<td>Actions</td>
<td>Purpose built trails, Shuttle services</td>
</tr>
<tr>
<td>Impact</td>
<td>Increase visitors to remote locations, Tourism, Airbnb taken off.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Situation</th>
<th>Wynyard Tulip Festival, Run for 29 years and grown each year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Characters</td>
<td>Steering committee, Local council, Local businesses</td>
</tr>
<tr>
<td>Actions</td>
<td>11am-9pm Saturday event, Closes off Main Street, Local gardens, Food, drink, music. ‘Tulip trail’ to Table Cape</td>
</tr>
<tr>
<td>Impact</td>
<td>Increases every year, Most local businesses involved, Attracts to local area, International visitors, Affects traffic</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Situation</th>
<th>Key attraction for destination, Tour guide unable to continue, Son mentored to take over family business, 5th generation local was able to build on this history and story of tour</th>
</tr>
</thead>
<tbody>
<tr>
<td>Characters</td>
<td>Jack Shick – 5th generation local</td>
</tr>
<tr>
<td>Actions</td>
<td>Created renewed interest and new story to tell, Increase destination offering</td>
</tr>
<tr>
<td>Impact</td>
<td>Increased interest into destination, Created a tour that incorporated nature and wildlife education mixed with destination history, Succession planning</td>
</tr>
</tbody>
</table>

| Situation | Outback Dan – ‘agri-tourism’, Drought – diversification, People – connection, Outback Queensland |
| Situation | Limestone Coast – Robe Boat & Fishing Show |
| Characters | Local produce – wineries, restaurants, Farmers, Council – sponsorship support, Surrounding businesses, Celebs |
| Actions | Started very small, Now involves other businesses |
| Impact | Small town sees significant increase in visitor numbers over extended period, International interest |

| Situation | S&C festival – strawberries and cherries, Bacchus Marsh, Created to promote local produce |
| Characters | Bacchus Marsh Tourism Association, Local vendors, Council, External visitors |
| Actions | Formed association, Hosted festival, Showcase region |
| Impact | Created leading tourism event, Promoted the area and its USP |

| Situation | Tasmania seen as a cultural backwater |
| Characters | David |
| Actions | Disruptor, Nonconformist, Imagined bigger than convention |
| Impact | Contagion of confidence |

| Situation | Guides of Mount Gambier, A regional city with stories to tell, but no cohesive outlet, Visitors had been requesting tours – gap in product, Creation of a program that provided a platform to develop new “tour” product using storytelling. |
| Characters | City of Mount Gambier, Historians, Tourism operators, Department of Environment & Water, and Forestry SA |
| Actions | BBRF funded new “Guides of Mount Gambier” program, Now in its second year, broadened to Limestone Coast, A brand for “tour guides”, based on storytelling, New tour guide businesses, easily entry points (no barriers) upskilling and inclusive |
### Impact
- An ongoing inclusion program: both young and old.
- Lifting pride in region
- Creating new businesses
- Shared marketing platform

### Situation
- 537 local governments in Australia – all different, some want more tourism, others have too many tourists. But all local governments have an interest in tourism.

### Characters
- Local governments employ 189,000 people and cover most of Australia

### Actions
- Invest, promote, market, advocate for their communities

### Impact
- Often left out of higher level government strategies
- Need acknowledgement, support and recognition

### Situation
- Wellington – a NSW town with social issues
- Help Aboriginal youth
- Passion for Aboriginal bush products
- Employment opportunities

### Characters
- Aboriginal men

### Actions
- Partnership with local bakery
- Sourced bush products
- Employed local people
- Contract with [?]

### Impact
- Wellington now has become known for the source of the product
- Employment
- Bush to plate success
- Aboriginal taste experience

### Situation
- Aboriginal woman in Tenterfield, NSW
- Interest in native plants
- Teachers at TAFE encouraged her to establish a tourism business
- Runs foraging tours, a café using native plants and a commercial nursery
- Employs three young Aboriginal people

### Characters
- Aboriginal woman/entrepreneur/business owner
- TAFE teachers provide mentoring/coaching, confidence building
- Young Aboriginal employees gain employment, traditional knowledge transfer from boss
- Visitors/customers

### Actions
- Learned how to run a tourism business
- Empowered business owner
- Built a successful business and visitor experience
- Created employment for local youth.

### Impact
- Pride, confidence building
- Traditional knowledge transfer
- Economic – employment for self and others
- Engaging visitor experience created
- Allows people to understand Aboriginal culture through native plants

### Situation
- Huskisson triathlon festival in Shoalhaven
- Brings people during off-season
- Worked well
- Grown to over 10,000 and created a legacy
- Time of year busy now for area, so change was required

### Characters
- Commercial event organiser
- Community
- Council
- Visitors

### Actions
- Successful event
- Happy and unhappy community; Councillor involvement
- Should it continue:
- Lasting legacy
### Impact
- Mixed emotions
- Need to work together more
- Think outside the square to make it work
- What is event legacy and how is it measured?

### Situation
- Oyster-fest
- Run for 29 years
- Started to showcase the oyster industry – was struggling at the time
- Local event

### Characters
- Oyster industry
- Give locals a reason to celebrate
- Showcase oysters for west coast
- Seafood and lifestyle

### Actions
- Great local event initially but large apathetic audience now with no buy-in from community

### Impact
- Festival went extremely well but locals complained it lacked local feel, but visitor feedback was great and represented larger economic development for the community, even though they don’t realise they want it.

### Situation
- Pilliga – few 100 residents
- Very small rural/forestry village in NSW
- State government stopped forestry – no waste
- Pilliga had a bore bath (hot artesian water) which was renovated to encourage tourism
- Plan suggested primitive camping area adjacent to the bore.

### Characters
- Council
- Pilliga community

### Actions
- Upgrade bore bath
- Camping area
- Walking track into town
- Interpretation and information

### Impact
- Visitation increased from 3 to 4 caravans per night to over 50 per night
- Hotel and general store (which trade intermittently) now open 7 days per week – now viable, providing goods and services for residents and visitors
- Main road was sealed, become a freight route, fed into Narrabri
- Supported establishment of 3 intermodal terminals. Narrabri will become a major port on the Inland Rail.

### Situation
- Passion
- Vision
- Commitment/belief
- There was a gap in the market (families)

### Characters
- One person

### Actions
- Attraction developed from the ground up literally

### Impact
- Successful not just personally but for the regional town nearby bringing many thousands of families to the area

### Situation
- Sport clubs and community groups funded by hotel
- Passion
- Compassion
- Commitment

### Characters
- Sporting opportunities create a safe place for kids/teens to be and make friends
- Community groups build up community spirit and support those in need

### Actions
- Donate money
- Scholarships
- Less minors with alcohol and drug issues

### Impact
- Equipment for clubs and groups
- Opportunity for those who would not have had without money
| Situation | • Oyster farmer  
• Opened up a “farm gate scenario” |
|---|---|
| Characters | • Husband and wife team  
• Small number of employees |
| Actions | • Impact on visitation to their farm-gate increase  
• Also are involved with another tour business who operates a cycle tour between vineyard and the oyster farm |
| Impact | • Now running a tasting tour on their property  
• People visit the area specifically to visit the farm, increasing visitation to the area. |

| Situation | • Cruises to Trial Bay  
• 10 days |
|---|---|
| Characters | • NSW Port Authority  
• Kempsey Shire Council |
| Actions | • 10 days to pull |
| Impact | • Positive  
• State Government capital investment in infrastructure |

| Situation | • Seasonality of business  
• Coast village means seasonality of tourism |
|---|---|
| Characters | • Local government  
• Business  
• Community |
| Actions | • Local government – skills develop  
• Off season promotion in partnership with states  
• Off season business growth |
| Impact | • Business growth  
• Employ new people  
• Kid down the road gets a full time job out of school – not just summer holidays |

| Situation | • Small town, rural  
• Bushfires |
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Characters</td>
<td>• Chef, cook</td>
</tr>
</tbody>
</table>
| Actions | • Taken risks to invest  
• Community collaborate  
• Persistence |
| Impact | • Working together  
• Developing the destination experience  
• Supporting each other |

| Situation | • National rural health conference  
• Hosted in Hobart in 2019  
• 1000 delegates |
|---|---|
| Characters | • BE Tasmania bid for the conference  
• State Government  
• Health industry professionals |
| Actions | • Conference won and held in Hobart |
| Impact | • Knowledge transfer; Productivity and innovation; Research collaboration  
• Economic benefit; Regional dispersal |
| Situation         | Cairns vs Innisfail  
|                  | Started as the same town  
|                  | Cairns got an airport, investment, visitors came  
| Characters       | Port Authority  
|                  | Local council  
|                  | Investors  
| Actions          | A tourism industry was built, sustaining and building the economy  
| Impact           | The people of Cairns were able to access more resources, better restaurants, shopping, jobs, experiences, access to their natural environment.  

| Situation         | Silo Art Trail  
|                  | Agriculture based region – badly impacted by drought  
|                  | Created largest outdoor gallery  
| Characters       | Local farmers and community members  
|                  | Australian artists  
|                  | Local government – Yarriambiack Shire Council  
| Actions          | Brim Silo – first painted silo – started the trail  
|                  | Community rallied together to get more silos  
|                  | Most advanced augmented reality of the silos available through a new app  
| Impact           | Now 8 silos  
|                  | Average 576 visitors per month to Silo Art Trail  
|                  | Brings in $25,000 to local businesses  
|                  | Businesses now revived and sustainable  
|                  | Communities much stronger socially and economically  
|                  | Started the street art trend.  

| Situation         | Emerging Eden cruise business  
|                  | Transitional – originally a fish and timber economy, not a tourism destination. Revived by tourism  
| Characters       | Volunteers  
|                  | Local government  
| Actions          | Vision/shared  
|                  | Collaboration between staff, NSW government, industry  
|                  | Investment  
|                  | 400-metre wharf  
| Impact           | New businesses  
|                  | More sustainable tourism industry  
|                  | Less seasonality  
|                  | Visitors – 15,000 international, 15,000 domestic in 2019  
|                  | Estimated at 50 by 2022  

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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**

**Community**
- Community acceptance
- Social awareness
- Community value of visitors
- Perceived/unmanaged “mass tourism”
- Community support
- Valuing tourism
- Community buy-in
- Lack of political will and energy and resources devoted to tourism
- Local community approval
- Balancing local priorities with tourists

**Workforce**
- Lack of skill and capability
- Skills and training
- Supply keeping up with demand
- Supply vs. demand
- Workforce access/training
- Skilled workforce – career vs university job
- Social media usage and influence
- Businesses open in regional areas
- Human resources and capability: ‘people power’

**Authenticity and uniqueness**
- Retaining unique value proposition for Australia
- Sea of sameness
- Authenticity/identity
- Experiences in regions
- Product development meeting customer
- Fickleness of desired experience
- Change and the ability to adapt/respond
- Differentiation
- Encouraging the right investment.
- No national focus or strategy. Domestic tourism
- Decrease in national domestic confidence
- Retaining Tasmanian-ness

**Sustainability**
- Relevance – changing consumer priorities
- Impacts of climate change becoming more prominent
- Environmental values of the consumer
- Losing out sustainable green credentials
- Climate change (3)
- Global warming
- Climate
- Defining “sustainable” that isn’t just rhetoric
- Environmental consciousness
- Global headwinds in regards to growth – Brexit, trade wars, et cetera.
- Time (visitors do not have enough time to disperse).
- Balancing growth with sustainability: social, cultural, environmental.

**Access**
- Transport
- Access
- Regional Australia access
- Remoteness of Australia and flight shaming
- Australia’s reputation as safe, respectful, diverse, Indigenous
- Access to regions
Global economy
- Global economies
- Global economy
- Over-tourism in some areas
- Investment money in slow global economy

Governance
- Geopolitics
- Lack of leadership
- Collaborating with industry and all levels of government
- Change of direction
- Engagement of local government
- Government not aligned with industry
- Local government involvement
- Communication between industry, government, and community
- Need for more collaboration and coordination across all levels of government
- Cross-governmental priorities
- Collaboration
- Bureaucracy and red tape
- Planning and approvals
- Red tape (2)
- Regulation
- Too much red tape
- State borders
- 3 levels of government
- Regulation
- Too much process and red tape around approvals for development
- Lack of real-time data
- Data for informed decisions
- Tracking tourism revenue regionally

Digital
- Lack of mobile telephone services in required area – travellers can’t access internet on the go
- Connectivity
- Connectivity (broadband)
- Internet connectivity

Infrastructure
- Appropriate infrastructure: roads, transport, water, sewerage
- Infrastructure investment
- Appropriate infrastructure
- Infrastructure capacity
- Access to infrastructure in regions
- Lack of physical and digital infrastructure
- Critical infrastructure – sewerage, roads, services to be built
- Infrastructure

Competition
- Competition from other destinations
- “Same, same (but different)”
- Competition
- Very competitive international market
- Global economic pinch means less time and money for leisure
- Global competition
- Service standards
- Cost competitive

Investment & Funding
- Funding (4)
- Local government is a key provider of tourism facilities, infrastructure, et cetera. Yet is not funding to deliver this. Need funding support.
- Investment attraction
- Limited funding/secure income/sustainable income
- Funding improved capability of industry
- Slow/declining private sector investment in regional Australia (such as accommodation)
- Lack of investment in regional tourism
- Dollar strength
- Lack of investment
- Securing investment
- Tourism investment
- Ongoing investment
- Government funding
- Growth of tourism and impact on local infrastructure and community
- Infrastructure
- Visitor management (over-tourism)
Skills and capability
• More support for regional skills and capability
• Labour force/skill to deliver demand
• Workforce having trained employees in hospitality tourism
• Skills and experience in regions
• Education
• Lack of accommodation and hospitality providers

Access
• Cruise – marine infrastructure; Sydney marine infrastructure; Marquee regional ports e.g. Exmouth
• Access constraints – airline capacity
• Growth in aviation access – front core markets
• Accessibility
• Access
• Region transportation

Developing product
• Local government
• Maintaining unique identity
• Tourism/visitor economy viewed as a serious industry
• Local government working with tourism
• New product
• Ensuring collaborative regional approach
• Tourism product

Sustainability
• “Flight shaming” – awareness of long haul travel
• Climate change
• Over-tourism
• Managing over-tourism

Strategy & Planning
• Communicate strategy
• One vision
• Community wants and desires
• Keeping regions up to speed with internet, opportunities, communications

Regional dispersal
• Borders and boundaries
• Resources
• Regional dispersal
• is on capital cities or icons

Training
• Visa restrictions for core markets
• Workforce development and retention
• Customer service
• Maintaining a skilled and motivated workforce
• Consistency of service
• Jobs and employment
• Housing for staff

Access
• Access to regional [areas]
• Regional air services costs
• Remoteness
• Logistics
• Direct our access to regional destinations
• Centralisation of government agencies leading to declining regional populations
• Transport

Developing product
• Services where tourists want to be
• Quality products and experiences
• Customer focus
• Stay open
• Protection of resources: keeping [area] pristine
• Mining
• Leisure and attractions shortage

Sustainability
• Over-tourism: crowding
• Primary production viability
• Seasonality
• Seasonality especially in regional areas
• Water

Strategy & Planning
• Visitor information centre buy-in
• Strategic planning (2)
• Planning
• Ensuring viable tourism in remote locations
• All striving towards the common goal

Regional dispersal
• Dispersal
• Regional growth
• Focus internationally
Government
- Federal/state/local collaboration
- Getting government to listen and work with regional operators
- Government “really” understanding regional tourism
- Cross governmental working
- Whole of government commitment
- Poor signage – poor government policies

Accommodation
- Hotel supply in regions
- Airbnb – accommodation becoming more popular
- Lack of accommodation

Opportunities

Social tourism
- Social tourism/responsibility
- Social awareness
- Local tourism ambassadors
- Volun-tourism
- Sustainability credentials

Regions
- Combined tourism centres and other facilities e.g. ‘driver reviver’
- Regional dispersal
- Regional investment
- Lack of hotel supply
- Engage Indigenous Australians in storytelling.

Innovation
- Adventure tourist
- Differentiation
- Changing consumer behaviour
- Be different
- Explore being different
- Environmental credentials
- Infrastructure development
- Attract consumers
- Wellness tourism
- Tap expertise of local government in sector

Planning
- Planning reforms
- Agile and adaptive industry and government
- Better planning of infrastructure

Funding
- Appropriate investment encouraged
- Funding
- Acknowledgement of economic contribution of tourism
- Government cross working
- Working together to drive investment

Technology
- Digital innovation
- Technology
- Autonomous vehicles
- AI digital platform to be visitor-centric and maximise their limited time to show relevant product
## Data
- Research and dissemination of insights and industry
- Consistent data
- Reliable new data and research
- Customer understanding “data”
- Better data-driven planning
- Better data – more timely, more comprehensive
- Marketing – broader reach. Data and analytics

## Community & Domestic
- Community education/engagement in tourism
- Getting community on board – leads to increased value
- Competing land usage
- Connectivity with regions
- Community engagement
- Increased local experiences
- Domestic tourism taken seriously
- Australians holidaying at home more

## Education and employment
- Education
- Skills
- Funding programs to support skill development
- Tourism is a career/job for life
- Entry level employment opportunities
- Positive views on tourism – economic and social
- Employs local people and local investment
- Regional tourism as a job creator for regional Australia

## Collaboration
- Working together to drive investment
- Growth
- Current growth
- International growth
- Future growth
- Economic growth
- Government and industry sign off on strategy
- Collaboration (3)
- Collaborate across government and private sector for massive investment impact
- Concerted regional push
- Collaboration across all government levels
- Communication
- Collaboration and alignment
- Commitment to cross-governmental outcomes and partnerships
- Break down barriers and red tape for investment
- Coordinate collaboration across government – reduce duplication

## Cruise
- Cruise market development
- Cruise (regional) industry collaborations to bring visitors back as non-cruise tourists
- Cruise tourism

## Agriculture
- Food and wine
- Food and produce
- Inclusive and accessible tourism
- Agri-tourism – fresh products and inspiration
- Agri-tourism

## Technology
- Harnessing technology for our benefit
- Technology for creating product
- Technology
- Social media
- Use of technology and communications
- Collaboration thanks to digital media
- Application of technology of virtual reality to increase access to assets, stores, et cetera
### Sustainability
- Safe, clean, friendly destinations
- Nature-based tourism
- Economic driver support environment
- Environmental tourism
- Tap into sustainable environmental products to increase profits
- Extraordinary nature-based experiences – a focus area for national brand
- Sustainability
- Climate change

### Collaboration between regional areas
- Better collaboration in marketing
- A campaign for “real” Australia
- Collaborative regional Australian brands – break down barriers
- Cross-border collaboration and communication to enhance experiences
- Road trips
- Regional dispersal of visitors – road trips
- Unified strategy collaboration across all levels of government
- Better collaboration between regions

### Events
- Visitor economy outlook: events, festivals, business travel, international education
- Business events a key economic driver

### Indigenous cultural tourism or products
- Deepened engagement with Aboriginal people – tourism potential
- Celebrating Indigenous culture
- Aboriginal tourism – Australia’s point of difference
- Aboriginal legacy
- Aboriginal tourism
- Sustainable funding models for regional tourism
- Regional dispersal
- New product

### Product Development
- Product development
- Creation of new business
- Grow transport
- Create the products relevant to 2030
- Seed funding projects until they are self-sustaining
- Uniqueness
- Integration of industries to create new unique product and experience
- Night sky
- Unique wildlife
- Mental and general health wellness
- Unique history and historic sites
- Re-invigorate regions post-drought and structural change via inbound [tourism and migration
- New delivery models as new way of offering business are created

### Miscellaneous
- Stay open
- Building on existing infrastructure (e.g. using rail lines)
- Increased awareness leading to visitors becoming residents
- Safe environment
- Mobility
- Access
- Political stability
- Appropriately planned growth
- Asian visitor growth
- Economic sector recognition
- Tourism in winter months
- Government commitment to tourism
- National domestic strategy
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 four focus areas. The resulting top four 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:

- Environmental sustainability
- Ensuring a suitably skilled workforce
- Regional dispersal
- Working with communities and a ‘social licence’ to operate

**Poll Everywhere voting:**

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>Votes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environmental sustainability</td>
<td>29%</td>
</tr>
<tr>
<td>Ensuring a suitably skilled workforce</td>
<td>15%</td>
</tr>
<tr>
<td>Regional dispersal</td>
<td>11%</td>
</tr>
<tr>
<td>Working with communities and ‘social licence’ to operate</td>
<td>8%</td>
</tr>
<tr>
<td>Providing robust data</td>
<td>7%</td>
</tr>
<tr>
<td>Supporting business to take up new technology</td>
<td>4%</td>
</tr>
<tr>
<td>Improve workforce productivity and professionalism</td>
<td>8%</td>
</tr>
<tr>
<td>Building industry resilience</td>
<td>6%</td>
</tr>
<tr>
<td>Catering to accessibility requirements</td>
<td>2%</td>
</tr>
<tr>
<td>Enhancing indigenous tourism</td>
<td>5%</td>
</tr>
<tr>
<td>Emerging opportunities in marketing</td>
<td>5%</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?
Suitably skilled workforce

- Skilled people
- Retaining skills
- Identifying skills needed and gaps
- Understanding service standards
- Customer first mindset
- Consistent quality experience
- Sustainable businesses
- Return visitation
- Cost/training/loss of income
- Visas, WHM, immigration
- High-end product – skills and culture don’t match
- Desire to be in industry
- Data on successes
- High value jobs too!
  - Better sell tourism industry, not just service jobs
  - Extra recognition
- Understanding product, and selling it!
- Mentoring – career, job perspective.
- Taking them up a level, how?
- Housing for people who want to work
- Short term holiday accommodation
- Seasonality – match up with other regions e.g. snow fields
- Access to training
- Volunteer workforce, including travellers

Working with communities

- Managing negative impacts
- Planning and managing growth
- Development is appropriate in context
- Don’t love it to death
- Local communities – home
- Authenticity – special
- Brand promise
- Consumer priorities/values
- Cost not to be sustainable
- Eco awareness – new businesses
- Incentives
- Acknowledgement of value
- What does it mean economically beyond 2030?
- One player
- Tourism can be a leader
- Value promise: the Australian ‘customer experience’
- What are the expectations of customers and how do we meet them?
- More localised regional development
- Industry connection to training -> industry identifying what training
- Expanding seasons – enable more employment security
- Employee retention
- Profitability

Environmental sustainability

- Are government and business practices reflecting environmental needs?
- Tourism puts a dollar value on environmental assets and protect
- Tourism can fund preservation and conservation
- Need for strong leadership
- Balance between growth and protection
- Current lack of environmental brand
- Leadership at government level
- Not communicating our value proposition effectively
- Flight shaming – how to manage
  - Carbon offsetting
- Government procedures need to be streamlined
  - Need for flexibility as tourism product can be innovative, push the limits, do something different.
- Need to have measurement of impacts to enable good decision-making
- Biosecurity – agricultural-tourism
- Changing consumer behaviour
- Government actions affecting our reputation
- Needs to happen on a micro (individual business) and macro (government) level
- Support a range of education-tourism
Regional dispersal

- Big country with strong regional product
  - Authentic, stories, with depth
- Should be a baseline in the economy
  - i.e. providing revenue over a long period of time
- Tourism stimulates tree and sea change
- Ownership
  - Local government, regional, federal governments
  - Local communities
  - Local tourism industry
- Partnerships
- Experiences rather than destinations
- Avoid homogenisation
- Connectivity
- Understanding what we are
- Encouraging – stay open!
- Visitors into regions
- Keeping regions/local communities alive
- Diversify local industry/economy
- Outside of capital cities? Or outside of large cities?
- Hub and spoke – grow regional towns – then smaller towns, villages
- Core elements:
  - Infrastructure in place to service
  - Differentiation – uniqueness
  - Product – investment, good quality
  - Regional transport and cost
  - Sustainability through dispersal
  - Economic benefits:
    - Reducing dependence on agriculture, diversifying
    - Jobs
    - Access to services, goods, facilities
    - Supporting rural communities to allow them to produce food
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. Each table was then asked to identify their top game changer. The game-changer ideas were captured and are reported below.

Top Game Changers:

- Data providing actionable insights
- Funding/investment – government and private sector. Infrastructure; product; training; marketing and promotion.
- High speed rail to connect all of regional Australia – environmentally friendly
- Have political leaders respect the impact of the tourism industry and visitor economy as this will lead to future investments.
- Increase funding into regional infrastructure and attractions. Driven from a visitor tax.

Game Changers (all ideas):

- Agri-tourism development program – national level/federal funding
- Gap year program to support regional seasonality
- Indigenous cultural tourism
- Environmental edu-tourism
- Unified industry/government vision
- Non-parochial unified brand to promote regional Australia
- Accreditation for sustainability of project (construction and operation)
- Industry working closer to government
- High speed rail (passenger) – bullet trains/environmentally friendly.
- Robust framework to assess viable developments.
- Attitude – by government, community, industry. Culture shift
- Funding
- Nature-based/Aboriginal uniqueness
- Access: trains, aviation, cruise, affordability
- Domestic tourism
- Balance portfolio of markets
- Clear communication of strategy
- Buy in to strategy from industry
- Harness data and tech – social/digital communications
- Collaboration – share knowledge.
- Federal approach for industry development
- Create a tool kit for regional development
- Industry investment
• Tourism strategies from LGA – including measurable sustainability plan
• Have political leaders respect the impact of the visitor economy
• Promote industry through family business – not customer
• Funding – commonwealth and state – increasing significantly for product, infrastructure and marketing.
• Training and skills development
• Removing layers of bureaucracy/planning regulations and complexity.
• Consistency in approach to product development
• Working on USPs – focus on points of difference
• Digital – harness the opportunities
• Leadership – government down. United leadership on tourism, its benefits and uniqueness of brand.
• Customers without borders. Global communities.
• Credibility of Australian team brand
• Planning and integration of key strategic infrastructure
• Australian Tourism Data Warehouse/micro-targeted/data-led marketing and product development
• Fostering highly differentiated products/innovation
• Tweak international tourism arrival taxes to drive regional infrastructure
• Data to inform decision
• Balance portfolio of markets
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.

Participant’s main concerns, including environmental sustainability, maintaining a skilled workforce, and the provision of government funding, were discussed at length both in terms of current challenges and future opportunities. In general, participants also wanted to see governments at all levels take a more involved and collaborative approach to fostering the tourism industry in regional Tasmania, including investment in infrastructure, provision of grants, and marketing regional areas to both domestic and international tourists. The view that regional Australia had unique offerings was repeatedly expressed, although several challenges to reaching distant markets were raised, such as concerns over access and the skill of workers. Participants wanted to build on regional Australia’s reputation as safe, clean, and culturally unique, a prime area for agri-tourism and environmental tourism.

Many participants wanted to see their areas diversify into non-seasonal tourism pursuits; citing precedents implemented in other regional areas such as cruise ship access, extreme sports such as mountain biking, volun-tourism, and more cultural and artistic attractions like MONA. Participants wanted to see digital approaches taken when understanding and marketing to their key audiences, such as the use of big data and social media advertising. Solutions for improving the perceived lack of skilled workers included relaxing visa restrictions for regional jobs, improving housing options and affordability, and offering training for locals as an alternative to tertiary education in urban areas. Additionally, participants sought better connectivity through rail, roads and aviation, although noting the possibility of a downturn in air travel as a result of climate change and a shift toward carbon neutral travel.

The theme of Sustainability – especially the need specifically for economic, environmental and social sustainability - was a consistent message driven through a number of the activities and participant discussion throughout the workshop.