



A Tourism Partnership Framework for the Destination Southern NSW Region and the ACT

April 2019





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1. Executive Summary

The region represented by Destination Southern NSW (DSNSW) is strategically adjacent to the Australian Capital Territory (ACT). This unique geographic situation presents a range of opportunities and challenges for the development and delivery of tourism experiences and products. During the development of a Destination Management Plan for the Southern NSW Region, it was identified that greater collaboration and partnership with the ACT was needed to leverage relationships in a coordinated and consistent way.

It is acknowledged that existing relationships and successful ventures are already in place between stakeholders across the region though they are largely transactional in nature. The focus to date has been on specific operators or attractions, short term campaigns and packaged offers to market.

This project represents an opportunity to build on these early successes and develop a tourism partnership framework for the DSNSW region and the ACT (tourism partnership framework), it will be an important foundation for much of the work forecast in the DSNSW Destination Management Plan.

During October and November 2018, a program of review and consultation was undertaken. The following insights, strategic goals and priority actions represent the views and commitments of those parties responsible for delivery and ultimately success.

It is anticipated that these ideas and actions will evolve and develop over time, and will be reviewed in line with existing annual planning cycles to ensure alignment and appropriate resourcing.

Structure of this report



Part 1: Project Context

A description and synthesis of the rationale for the project that looks at the driving policy, stakeholder and program drivers for better regional collaboration.

Part 2: Insights and Themes

An analysis of primary and secondary sources of feedback that highlight the key challenges, opportunities, and required commitments for a tourism partnership framework.

Part 3: Strategic Priorities, Goals and Actions

Agreed recommendations for action that are linked to the strategic priorities and goals identified during the project.

2. Project Context

The NSW region represented by Destination Southern NSW (DSNSW) and the ACT enjoys a unique position within NSW and a competitive advantage for tourism. The region comprises a diversity of tourism opportunities with attractions including an international airport, national cultural institutions, growing regional food and wine offerings, and easy access to the coast and Snowy Mountains. Canberra as a city was recently rated by Lonely Planet as a must-see destination and is a significant source market with a population of over 400,000 people.

The region of “Canberra plus 3 hours” is considered as an economic zone of 800,000+ people. This was highlighted as part of the business case to secure direct international flights to Canberra International Airport.

During development of the Destination Southern NSW Destination Management Plan (DMP), stakeholders strongly expressed a desire for greater collaboration and partnership between the ACT and the surrounding region.

DSNSW champions a border-less view of opportunities and projects within the DMP which outlines a suite of priority projects for delivery by 2020. The development of a tourism partnership framework for the DSNSW region and the ACT (tourism partnership framework) is an important foundation for much of this work. A number of the priority projects identified in the DMP have the potential to bring benefit across the DSNSW region and are focused on growing the visitor economy.

These projects include:

1. A product audit, gap and capacity analysis
2. A targeted industry development and support program
3. Development of a new Southern Tablelands destination offer
4. A nature-based tourism project to be developed and delivered in partnership with NSW National Parks and Wildlife Service
5. Development of new regional touring routes
6. A partnership and leveraging framework for Canberra (this project), and
7. A new approach to visitor data and event evaluation.

Additional information about the progress of these projects and the work of DSNSW can be found online at: www.dsnsw.com.au

Why do we need a regional tourism partnership framework?

There are a wide spectrum of existing relationships and successful ventures already in place between stakeholders across the region. They include relationships of a commercial nature, those formed in response to opportunistic circumstances and those which are supported or facilitated by DSNSW and the ACT Government. Largely transactional in nature, the focus has been on specific operators or attractions, short term campaigns and packaged offers to market.

This project represents an opportunity to build on these early successes and leverage relationships in a coordinated and consistent way. A strategic approach to collaboration will help to build a profile of the whole region, delivering mutual benefits for participants.

It also provides a framework for new relationships and opportunities to develop.

The timing of this project seeks to capitalise on a number of initiatives that are geared toward supporting greater regional coordination and collaboration on tourism related projects including;

- clearly articulated goals in the NSW Visitor Economy Industry Action Plan 2030 (VEIAP 2030) relating to cross border co-operation, working with Local Government and a focus on developing regional tourism products,
- the newly established Canberra Region Joint Organisation of Councils,
- integrated community strategic planning in Local Government that includes a focus on regional development and tourism,
- a planned refresh and update of the Visit Canberra brand and positioning including an expanded regional brand, and
- the continued growth and expansion of the international flights from the Canberra International Airport.

3. Insights

During October and November 2018, a program of review and consultation was undertaken. The views and experiences of key stakeholders from across Government, Councils, industry, education providers and from within the Destination NSW network were sought as well as a detailed desktop review of related policies and plans.



The following key insights represent the views and voice of the sector. They give context and priority to the strategic goals and actions described in Section 5.

Working together is a no brainer – why aren't we doing it?

For a partnership to be successful, it must demonstrate the value of collaboration to encourage commitment and participation.

Collaborating on funding and grants projects, training, information sharing and skills exchanges will yield better outcomes and have more widespread impact.

A tourism partnership framework needs to be operationalised at all levels; political, executive, officer and in private industry to be successful. The challenge is to outline a framework in which everyone can find their place.

There's never been a better time than right now

The VEIAP 2030, a soon to be updated Visit Canberra brand, the Canberra Region Joint Organisation, the Canberra International Airport, and MOU between NSW and ACT, integrated community strategic plans for Councils and new Destination Networks provide the conditions for collaboration and there is both intent and capacity to move forward.

The regional experience is a tale of the big and the small

There is a wide spectrum of maturity and experience across the region and a tourism partnership framework needs to capitalise on promoting mature and export ready products now while supporting development of new and emerging products.

Customers don't see the boundaries that often constrain us

It is important to acknowledge the constraints of collaboration (funding, personnel resources, administrative boundaries) and use a tourism partnership framework as a way to identify issues and seek to overcome them.

Putting the customer at the centre of all that we do is vital. We must ensure what we say and how we market the region must reflect market demand.

A tourism partnership framework isn't a replacement for local campaigns

Aggregate marketing efforts sometimes don't work and can compromise on specific details. The tourism partnership framework is not a campaign or a replacement for a campaign but rather a roadmap for how to hook individual campaigns or offers into a bigger and more compelling regional message. Getting the balance right is important.

An agreed way of describing the region and a commitment to leverage campaigns around it is required at all levels. The development of a regional personality or story will help grow the market and ensure all efforts are aligned and on message.

There is plenty of low hanging fruit

Several priority actions have been identified as first steps in actioning a tourism partnership framework including; joint familiarisation or showcase tours, shared grant applications, packaged offers that use Canberra as a gateway and capitalise on the international airport, and skills exchanges and training programs.

Most industry operators currently take advantage of the region's proximity to the city of Canberra through targeted advertising and marketing. There is further opportunity to leverage Canberra as a source market with residents and people visiting friends and relatives.

Transport connectivity is an issue – maybe beyond the scope of this framework but important to keep in mind

Many stakeholders nominated better public transport and road infrastructure as key to encouraging greater visitation from Canberra.



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4. Strategic Themes

Throughout the project, a number of key themes have emerged in relation to a tourism partnership framework. They represent the acknowledged opportunities and challenges of working in partnership by those parties responsible for delivery and ultimately success.

Collaboration and shared decision making will benefit everyone and ensure opportunities are maximised across the region

Opportunities

Since the commencement of international flights to and from Canberra International Airport, there have been efforts by individual LGAs, and Canberra Region Joint Organisation members collectively, to partner with Visit Canberra to promote regional experiences to the international market. Stronger collaboration with Access Canberra, Visit Canberra, Destination NSW, Canberra Region Joint Organisation, tourism companies, local government and peak bodies must improve in order to further leverage Canberra's proximity to the region. This needs to be coupled with clarity around governance structures and Government commitment to appropriate resourcing.

It is also seen as vital to demonstrate the value of collaboration with improved access to data, insights and real examples of how working together delivers better outcomes. Brokering coordinated efforts will deliver better results. Indeed, agreed metrics and a consistent approach to the collection of visitation data and visitor economy impacts is an identified priority need in the DMP.

The opportunity to establish genuine industry and government engagement, and coordinate actions for funding and support from State, Territory and Federal Governments are seen as a critical first step with stakeholders seeking greater alignment between NSW State Government and ACT Government in order to increase cross-border cooperation and tourism.

Challenges

Funding related issues were identified as a significant barrier by stakeholders. Specifically, a lack of coordinated funding and priorities between Local, State, Territory and Federal Governments, and the private sector was seen as a major barrier to a successful joint regional project or campaign.

Further, some stakeholders noted significant variations in the budget for tourism development allocated within different local areas, with some locations receiving up to ten times the value of others.

Coordination across the sector particularly in terms of information sharing, communication and funding to support and further develop the industry was a key theme during consultation. Any future actions must acknowledge the constraints [funding, administrative boundaries, political, resource constraints].

A strong regional character that reflects the diversity and unique value proposition will benefit operators large and small

Opportunities

The majority of stakeholders consulted agree there is a principle need for a consistent and approved way of describing the region and a commitment to leverage campaigns around it. Partners across the region seek to build on the existing brand recognition of Canberra as the largest inland city in NSW and home to significant cultural institutions. Likewise, Canberra seeks to capitalise on what the region has to offer that is of interest to visitors (food, wine, snow, coast, nature).

Opportunities identified by stakeholders for building a stronger regional narrative include building the image of 'one region' while retaining and growing stronger recognition and information about sub-regions. It is important that the voice of the customer is reflected in the updated regional character and that it echoes the appropriate market demand and sentiment.

Joint marketing and promotion of transport, accommodation, destinations and experiences is critical to build and promote a regional character. This needs to balance a single unifying regional narrative with the unique diversity of individual experiences, and sub-regions.

Better access to information for visitors is seen as important and a key outcome for building an integrated network and understanding of products and services in the region.

Challenges

The varied and diverse sub-regions and lengthy distances between them was identified as a key challenge for creating a single regional character.

Limited quality regional information and patchy customer service and support were also identified as limitations or drawbacks to promoting a regional character. It was acknowledged that any collateral or messaging must consider the customer need and demand as a priority in how the region is marketed.

A balanced approach to product development is required to successfully grow the offers across the region. It must acknowledge the different levels of maturity and capacity throughout the sector, showcase the hero and export ready products now while supporting and growing emerging and developing products.

Sharing knowledge and building a skilled workforce is essential to the success of the region

Opportunities

The majority of stakeholders expressed interest in opportunities for knowledge sharing, upskilling and learning from best practice. This included staff swaps/placements and experience development opportunities. Other feedback highlighted the need for industry capacity building. Collaborating on training, information sharing and skills exchanges is considered key to delivering better outcomes and is likely to have more widespread impact.

Challenges

Demand for skilled workers across the region often exceeds the available human resources, a problem echoed in many similar locations across NSW.

Increased investment in regional training programs is required to meet the current and expected demand and coordination of training services between technical education facilities and schools would be advantageous.

Additionally, opportunities to learn from and share knowledge amongst current employers and employees at regionally focussed skills exchanges, targeted training events or conferences is seen as valuable.

New transport infrastructure is a critical part of success and growth

A key concern articulated during consultation related to better public transport and road infrastructure. Recommendations for actions included better transport connections (east-west), improved roads, and utilisation of small airports to provide direct flights to Canberra and link in with international and other domestic segments.

Though outside the scope of the tourism partnership framework, it is an important concept to keep at the forefront of negotiations on broader regional programs.



5. Priorities, Goals and Actions

The following strategic priorities, goals and actions were developed at a workshop with representatives from Government, industry, the education sector, local attractions and from Destination Networks. They represent a high-level commitment to enacting the tourism partnership framework.

Strategic Priorities

1. The framework establishes a process for collaboration and charts the way forward for all tiers of Government and industry to leverage a unique position within NSW and a competitive advantage for tourism.
2. The framework strives to establish an agreed and consistent narrative that takes into account the value proposition of the whole region while remaining flexible enough to showcase the diversity of offers encompassing the coast, mountains, tablelands and capital. It also creates the conditions for a coordinated approach to growing the skills, capacity and products offered across the region.
3. The framework delivers multiple benefits to businesses and communities by enhancing the tourism sector and working to meet the needs of a growing market and industry.

Goals

1. To establish mechanisms for collaborative planning and decision making between key government stakeholders with responsibility for tourism in NSW and the ACT.
2. To develop a program of shared research insights, data and evaluation that demonstrate the value of collaboration for decision makers.
3. To establish a practice of cooperation and coordination for joint funding applications and projects.
4. To determine a shared narrative that promotes a consistent and approved way of describing the region and puts the customer at the centre of the offer.
5. To encourage regional capacity building, training and skills exchanges.
6. To leverage the whole region as a value proposition when marketing established, new and emerging products.



Actions

The actions listed in the following table identify how the strategic priorities and goals will be operationalised, the areas of responsibility and indicators of success. It is anticipated that they will evolve and develop over time, and will be reviewed in line with existing annual planning cycles to ensure alignment and appropriate resourcing.

Strategic Priorities, Goals and Actions	Lead	Collaborators	Indicators of Success
Strategic Priority: Collaboration and Decision Making			
Goal 1: Collaborative planning and decision making			
<p>Establish an inter jurisdictional reference group on tourism to provide a forum for liaison on tourism matters for the region and ensure alignment of key priorities and actions identified</p> <p>Focus of the group is to be on managing supply side issues and coordination rather than marketing or demand creation</p>	<ul style="list-style-type: none"> ■ DSNSW 	<ul style="list-style-type: none"> ■ Canberra Region Joint Organisation (CRJO) ■ DNSW ■ NSW Cross Border Commissioner ■ NSW Dept Premier and Cabinet ■ Visit Canberra 	<p>Individual organisations work plans are aligned to the shared priority goals and actions identified in the regional tourism partnership framework</p> <p>Reference group is considered as the key forum for engagement on tourism projects across multiple jurisdictions</p> <p>[Potential] Annual tourism summit with Destination Networks, Visit Canberra, CRJO, Ministers to establish priorities and themes</p> <p>Tourism is considered a critical pillar in the new MOU between NSW and ACT</p>
<p>Build alignment with the DSNSW DMP and strategic planning processes within Local Government on tourism</p>	<ul style="list-style-type: none"> ■ Local Councils 	<ul style="list-style-type: none"> ■ CRJO (via tourism Working Group) ■ DSNSW 	<p>Local Council Community Strategic Plans reflect priority goals for greater regional alignment and collaboration on key tourism projects</p> <p>Recognition of the tourism sector as a significant economic contributor to local government regions</p>
<p>Activate existing regional forums to align tourism with other economic development programs</p> <p>Forums may include; Regional Leadership Forum hosted by NSW Dept Premier and Cabinet, General Managers of Local Councils Forum and the Canberra Region Joint Organisation</p>	<ul style="list-style-type: none"> ■ CRJO ■ NSW DPC 	<ul style="list-style-type: none"> ■ DSNSW ■ Visit Canberra 	<p>Socialisation and promotion of tourism projects across the region</p> <p>Tourism issues are progressed and considered by agencies and departments with responsibility for related programs including transport and regional investment</p>
Goal 2: Demonstrating the value of collaboration			
<p>Showcase successful examples of collaboration through storytelling and development of sector case studies</p>	<ul style="list-style-type: none"> ■ DSNSW 	<ul style="list-style-type: none"> ■ Industry ■ Visit Canberra 	<p>Written and video case studies are well received by sector and help encourage future collaboration</p>

Strategic Priorities, Goals and Actions	Lead	Collaborators	Indicators of Success
Establish a data and evaluation framework for tourism across the region with agreed metrics to be collected and reported by ACT and NSW	<ul style="list-style-type: none"> ■ DSNSW ■ Visit Canberra 	<ul style="list-style-type: none"> ■ DNSW ■ Local Councils ■ Local Tourism Operators 	<p>Metrics collected are aligned, and reported as part of ACT Visit Canberra program and as part of the NSW VEIAP 2030</p> <p>Councils encouraged to collect and report on agreed evaluation metrics</p>
Undertake annual research to understand customer sentiment and awareness of the offerings across the region and to determine priorities for large scale/multi-jurisdictional campaigns	<ul style="list-style-type: none"> ■ DSNSW ■ Visit Canberra 	<ul style="list-style-type: none"> ■ DNSW ■ Local Councils ■ Local Tourism Operators 	<p>Benchmark research is established and built on over time. The results are used by the sector to understand trends and inform future project development</p>
Goal 3: Coordinated funding and projects			
Establish grants hub that provides advice and support for applicants – to be administered by the interjurisdictional reference group described in Goal 1	<ul style="list-style-type: none"> ■ DSNSW 	<ul style="list-style-type: none"> ■ CRJO ■ DNSW ■ Visit Canberra 	<p>Number of successful regional grant applications and funded projects</p> <p>Growth in the number and diversity of grant funding opportunities available in the region</p>
Strategic Priority: A Strong Regional Character			
Goal 4: A shared regional narrative			
<p>Develop an agreed regional narrative that describes the region, its features and value proposition</p> <p>Ensure the narrative is based on sound market research and customer feedback when determining use of terms, names and descriptions and is responsive to market demand</p>	<ul style="list-style-type: none"> ■ Visit Canberra 	<ul style="list-style-type: none"> ■ CRJO ■ DNSW ■ Canberra Region Tourism Leaders Group ■ DSNSW 	<p>The regional brand and narrative are adopted and used by Councils, DSNSW, ACT Govt, NSW Govt and operators across the sector</p> <p>The regional narrative is a rallying point for the region and versatile enough for a wide spectrum of users</p> <p>The regional narrative is consistently described in key strategies and DMPs by Visit Canberra, DSNSW, DNSW and Destination Networks</p>
Capitalise on international visitors and those visiting friends and relatives by ensuring that packages hubbing in and out of Canberra are marketed effectively	<ul style="list-style-type: none"> ■ Industry 	<ul style="list-style-type: none"> ■ DNSW ■ DSNSW ■ Visit Canberra 	<p>Number and diversity of new products that are tailored to the international market and that showcase more than one destination within the region</p>

Strategic Priorities, Goals and Actions	Lead	Collaborators	Indicators of Success
Strategic Priority: Growing the Sector			
Goal 5: Capacity building, training and skills			
Develop a program of shared training and networking opportunities that are open to staff and industry from both NSW and the ACT and that leverage the suite of tools and programs currently offered by DNSW and Visit Canberra	<ul style="list-style-type: none"> ■ DSNSW ■ Visit Canberra 	<ul style="list-style-type: none"> ■ DNSW 	<p>Number of events and opportunities that meet the needs of industry and the sector and provide professional development and improved capabilities</p> <p>Staff secondment/placement/exchanges are a feature of the sector and valued by employers and employees</p> <p>There is readily available information on training and skills based learning opportunities across the region</p>
Undertake a review and alignment of education opportunities within ACT and the DSNSW region to support the development of job ready workers	<ul style="list-style-type: none"> ■ Canberra Institute of Technology ■ TAFE NSW 	<ul style="list-style-type: none"> ■ DNSW ■ DSNSW ■ NSW Dept Premier and Cabinet ■ Visit Canberra 	<p>CIT and NSW TAFE programs offer training that meets emerging demands of regional tourism sector</p> <p>Internships across multiple locations are a feature of graduate employment</p> <p>Effective leveraging of strategic employment programs across the Region to build sector capability and resources</p>
Goal 6: Leveraging the whole region as a value proposition			
Support mature market offers with a history of successful delivery by coordinating joint familiarisation tours and campaigns to showcase the region	<ul style="list-style-type: none"> ■ DSNSW ■ Visit Canberra 	<ul style="list-style-type: none"> ■ Industry ■ Local Councils 	<p>Strong and effective regional campaign that showcases the hero experiences of the whole region</p>
Support new and emerging products with 1-2 years of experience by providing opportunities for networking with experts, upskilling teams and linking into to regional narrative and campaigns	<ul style="list-style-type: none"> ■ DSNSW ■ Visit Canberra 	<ul style="list-style-type: none"> ■ Industry ■ Local Councils 	<p>Transition of emerging and new experiences to become export ready and suitable to be showcased nationally and internationally as part of a regional packaged offer</p>
Support those in the sector looking to establish a product or new experience with an opportunity to participate in an introductory start up program that ensures development of quality products that are aligned to the regional brand and narrative	<ul style="list-style-type: none"> ■ DSNSW ■ Visit Canberra 	<ul style="list-style-type: none"> ■ Industry ■ Local Councils 	<p>Number and diversity of quality new products and experiences across the region that align with the brand and narrative</p>



