



# Sydney Harbour National Landscape

EXPERIENCE DEVELOPMENT STRATEGY – 5 December 2013



# TABLE OF CONTENTS

<b>EXECUTIVE SUMMARY</b>	<b>3</b>
<b>BACKGROUND</b>	<b>5</b>
Purpose of the document	5
Australia's National Landscape Program	5
<b>SYDNEY HARBOUR NATIONAL LANDSCAPE</b>	<b>6</b>
Where is it?	6
What makes it unique?	6
Positioning of the Landscape	7
Tourism in the Landscape	8
Drivers of change in the Landscape	8
Conservation values	9
<b>THE TARGET AUDIENCE – EXPERIENCE SEEKERS</b>	<b>10</b>
<b>STRATEGY OVERVIEW</b>	<b>11</b>
THEME 1 – NATURE ON OUR DOORSTEP	13
THEME 2 – DISCOVER OUR ANCIENT CULTURE	25
THEME 3 – RELIVE OUR HISTORY	31
<b>ENABLING ACTIONS</b>	<b>35</b>
<b>ACTION PLAN</b>	<b>36</b>
<b>APPENDIX</b>	<b>39</b>
<b>CASE STUDIES</b>	<b>42</b>

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Photographers:

Dan Boud, Catch n Cook, Michele Cooper, David Finnegan, Dan Goss, Andrew Gregory, James Horan, Ian Lever, Hamilton Lund, Fiona Morris, James Pipino, Philip Quirk, Andrew Richards, Ethan Rohloff, Mark Sherborne, Pierre Toussaint, Grenville Turner, Robert Wallace and Tony Yeates.



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# EXECUTIVE SUMMARY

Sydney Harbour is one of 16 National Landscapes included in Australia's National Landscapes Program – a partnership between tourism and conservation agencies that is being implemented at national, state and local levels.

The boundary of the Sydney Harbour National Landscape extends broadly from Ku-ring-gai Chase National Park in the north to Royal National Park in the south, and Parramatta in the west, where Old Government House, one of the World Heritage Australian Convict Sites, is located.

The Experience Development Strategy outlines experiences that will strengthen the appeal of Sydney Harbour National Landscape in the minds of international *Experience Seekers* – Tourism Australia's target market.

**Three priority themes** are put forward for creating tourism experiences that will deliver on the brand identified for Sydney Harbour National Landscape, being '**spellbinding**'.

The first of these themes, **Explore nature on our doorstep**, is all about the striking juxtaposition of Sydney and its surrounding environment. The second, **Discover our ancient culture**, is about making personal connections with the world's most ancient living culture in the context of a large cosmopolitan city. The third theme, **Relive our history**, is about exploring our colourful colonial history that adapted to and was shaped by the Landscape.

Eight hero experiences are identified for Sydney Harbour National Landscape that align with these themes. Hero experiences are the standout visitor experiences that best reflect a destination's brand promise and positioning in the market. They help define the place, its people and stories.

The hero experiences identified for Sydney Harbour National Landscape are outlined in the diagram below.

The Experience Development Strategy recommends projects that will deliver each of the eight hero experiences within the Landscape. In other words, these are the projects that will bring the hero experiences to life. The projects and their level of importance are outlined below. Priority one projects have the highest priority for implementation.



# EXECUTIVE SUMMARY

## PRIORITY ONE PROJECTS

- Turn the Royal Coast Track into Australia's premier coastal trail experience
- Establish a world-class journey on Pittwater
- Develop a unique Aboriginal tour guide program that provides visitors with an unforgettable connection with the Landscape and with the world's oldest living culture
- Create the world's best harbour walking experiences.

## PRIORITY TWO PROJECTS

- Develop Australia's gateway marine life encounter
- Develop a world-class conservation program in Sydney Harbour National Landscape that visitors can get involved with
- Develop a one-of-a-kind contemporary Welcome to Country Aboriginal experience that will inspire and amaze
- Develop two new immersive experiences that tell the story of early Australia.

These priority projects will assist Sydney Harbour National Landscape reach its potential. Each of the projects is outlined in the Experience Development Strategy. The implementation schedule and organisations responsible for delivery of these projects is shown in the following action plan.

ACTION	LEAD BODY	PARTNER ORGANISATIONS	TIMEFRAME
Turn the Royal Coast Track into Australia's premier coastal trail experience	NSW NPWS	Industry, Local Councils, Friends of the Royal National Park, Premier's Council for Active Living	2014–2016
Establish a world-class journey on Pittwater	NSW NPWS	Industry, Local Councils, Aboriginal communities, Local Aboriginal Land Council	2015–2016
Develop a unique Aboriginal tour guide program that provides visitors with an unforgettable connection with the Landscape and with the world's oldest living culture	NSW NPWS	Destination NSW, Indigenous Business Australia, Industry, TAFE, Local Aboriginal Land Councils, Aboriginal communities and organisations	2014
Create the world's best harbour walking experience	NSW NPWS	Destination NSW, Industry, Sydney Harbour Federation Trust, Local Councils, Premier's Council for Active Living, The Walking Volunteers, Sydney Coastal Councils Group	2014–2016
Develop Australia's gateway marine life encounter	Industry, Sydney Institute of Marine Science	NSW NPWS, volunteer groups, Sydney Coastal Councils Group	2015–2016
Develop a world-class conservation program in Sydney Harbour National Landscape that visitors can get involved with.	Conservation Volunteers Australia	NSW NPWS, volunteer groups, Taronga Conservation Society, Foundation for National Parks and Wildlife	2015
Develop a one-of-a-kind contemporary Welcome to Country Aboriginal experience that will inspire and amaze	NSW NPWS and Industry	Local Aboriginal Land Councils, Aboriginal communities and organisations	2016–2018
Develop two new experiences that will reinvent the way visitors feel, think and relate to early Australia	Sydney Living Museums, Sydney Harbour Federation Trust	Industry, Destination NSW, NSW NPWS	2014–2015

# BACKGROUND

## Purpose of the document

The Experience Development Strategy outlines experiences that will set Sydney Harbour National Landscape apart from other National Landscapes and strengthen its position in the minds of international *Experience Seekers*. Recommendations on projects to activate these experiences within the Landscape are provided within the document.

The objectives behind the development of the Experience Development Strategy are:

- 1 to deliver on Sydney Harbour National Landscape's market positioning for the *Experience Seeker* market
- 2 link conservation and tourism
- 3 recommend sustainable and innovative projects
- 4 foster partnerships and collaboration.

The Experience Development Strategy is endorsed by the Sydney Harbour National Landscape Steering Committee.

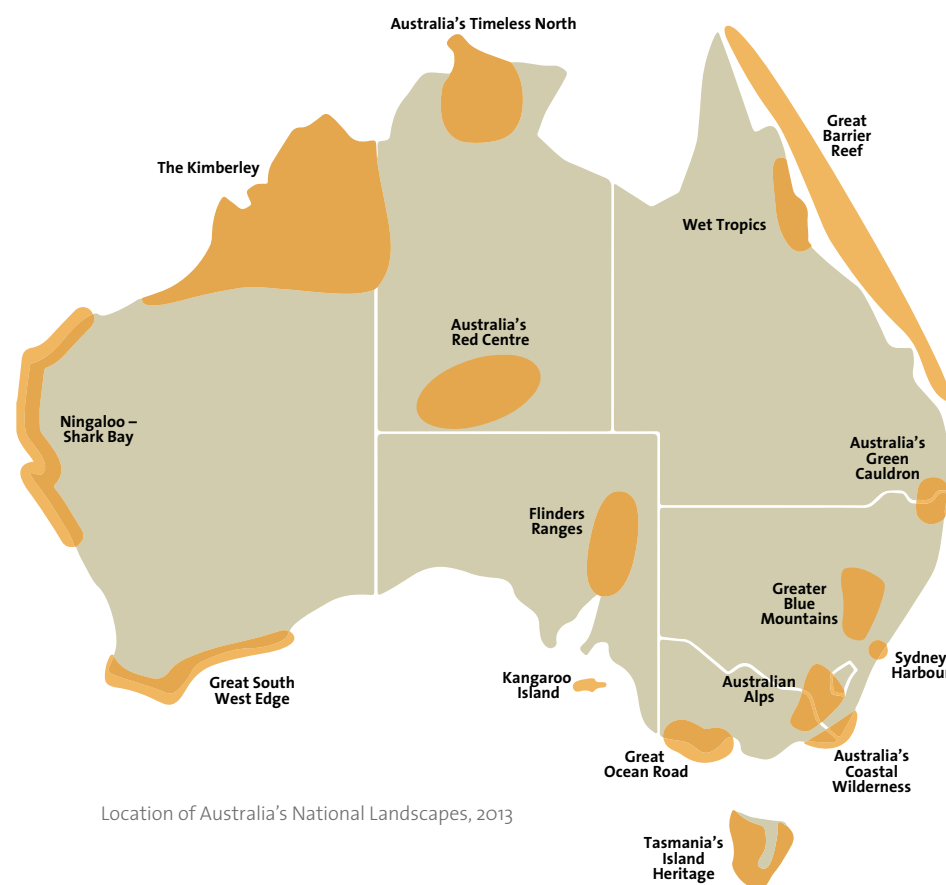
### Sydney Harbour National Landscape Steering and Working Committee – list of representatives

- After Dark Nature Tours
- Bangarra Dance Theatre
- Bass and Flinders
- Captain Cook Cruises
- Conservation Volunteers Australia
- Destination NSW
- Ecotreasures
- National Parks Association NSW
- NSW National Parks and Wildlife Service
- Premier's Council for Active Living
- Quarantine Station
- Riverside Marine – Fantasea
- Royal Botanic Gardens
- Sydney Coastal Councils Group
- Sydney Coast Walks
- Sydney Harbour Federation Trust
- Sydney Institute of Marine Science
- Sydney Living Museums
- Sydney Olympic Park Authority
- Taronga Conservation Society
- Tourism and Transport Forum
- Walking Volunteers

## Australia's National Landscape Program

Australia's National Landscapes Program is a partnership between tourism and conservation. Its aim is to support tourism activities that provide conservation outcomes and is jointly led by Tourism Australia and Parks Australia. There are 16 National Landscapes in the Program, showcasing the best of Australia's natural and cultural heritage.

Sydney Harbour National Landscapes is one of these.



Location of Australia's National Landscapes, 2013

# SYDNEY HARBOUR NATIONAL LANDSCAPE

## Where is it?

Sydney Harbour National Landscape extends broadly from Ku-ring-gai Chase National Park in the north to Royal National Park in the south. It also extends to Parramatta Park in the west where one of the World Heritage Listed Australian Convict Sites is located.



## What makes it unique?

Eight important attributes make the Sydney Harbour National Landscape stand out as a destination. These were identified in the market positioning completed for Sydney Harbour National Landscape.

Defining attributes of Sydney Harbour National Landscape<sup>1</sup>



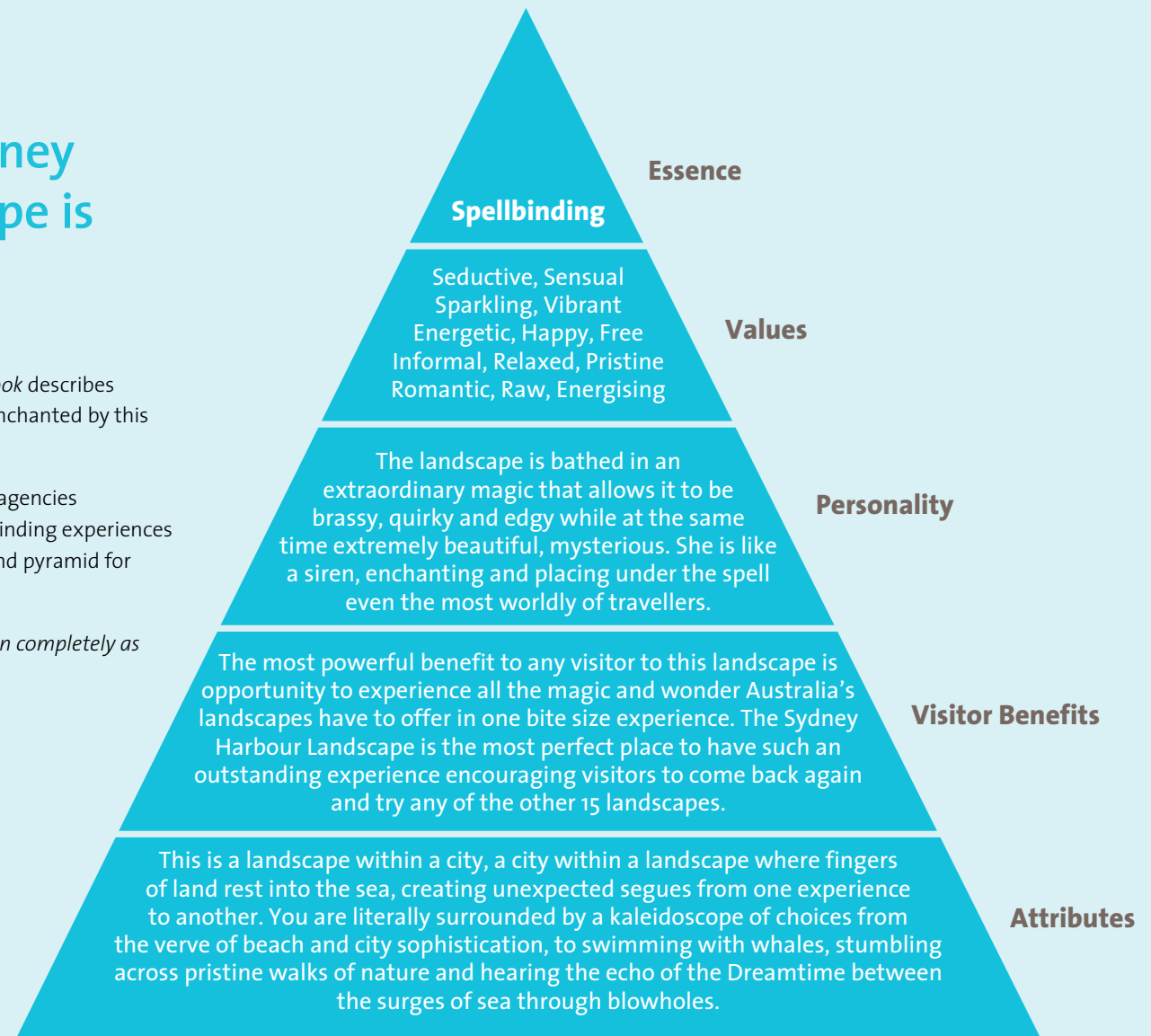
## Positioning of the Landscape

# The brand essence of Sydney Harbour National Landscape is “spellbinding”.

*Sydney Harbour – Australia’s National Landscapes Positioning Guidebook* describes ‘spellbinding’ as providing visitors with the opportunity to become enchanted by this Landscape and its stories.

This point of difference is widely accepted by tourism operators and agencies involved with Sydney Harbour National Landscape. Along with spellbinding experiences come a set of values, benefits and attributes as illustrated in the brand pyramid for Sydney Harbour National Landscape.

The Oxford Dictionary defines spellbinding as “*holding one’s attention completely as though by magic; fascinating.*”



Brand pyramid for Sydney Harbour National Landscape<sup>2</sup>

<sup>2</sup> LEAP Agency, 2012

# SYDNEY HARBOUR NATIONAL LANDSCAPE

## Tourism in the Landscape

Sydney is Australia's major gateway, receiving 2.6 million international visitors in 2012–13. This represents 42 per cent of all inbound arrivals<sup>3</sup>. The visitor economy is an important part of Sydney's economy and it is estimated that 86,000 people are directly employed in the tourism industry in Sydney<sup>4</sup>. In 2012 visitors spent a total of \$12.9 billion in Sydney over the course of 30.8 million trips and stayed 78.9 million nights.

A high Australian dollar, the rise in popularity of Asian and South American destinations and competition from other centres such as Melbourne has led to a reduction in Sydney's market share over the last 5 to 10 years<sup>5</sup>. As a result Sydney needs new experiences, investment and infrastructure that will increase its competitiveness on the world stage.

### VISITOR SNAPSHOT – SYDNEY 2012/13<sup>3</sup>

VISITORS	NUMBER	EXPENDITURE	LENGTH OF STAY
International	2.8 million	\$5.9 billion	21 nights
Domestic overnight	7.7 million	\$5.3 billion	3 nights
Domestic day	18.7 million	\$2.1 billion	–

## Drivers of change in the Landscape

### The appeal of Sydney has waned

The Visitor Economy Taskforce Report (2012) suggests that Sydney has lost its number one status across a range of measures. It has been outperformed by competitor destinations in Australia and the Asia-Pacific region over recent years.

### Competition from other destinations

Destinations across Australia and the world presently provide many similar experiences to those available in Sydney. They have developed infrastructure and products to attract visitors that Sydney once received.

### Asia is an increasingly important growth market

The Tourism Forecasting Committee expects that growth in inbound visitation will be driven by markets out of Asia. From 2011/12 to 2016/17 China visitation is expected to grow at 8.8% per annum, Malaysia (6.6%) and Singapore (5.2%)<sup>6</sup>. This growth is expected at a time when demand from traditional western markets is forecast to soften.

### A high cost destination

A recent survey by Destination New South Wales found that whilst Sydney is perceived as a busy, beautiful, vibrant and cosmopolitan city, it is also seen as expensive. This has in part been caused by a high exchange rate. For only the second time since hosting the Olympics in 2000, Sydney was not in the top 10 cities list in the prestigious Travel + Leisure US World's Best Awards, with the city rating poorly on value-for-money.

### Shrinking market share

Over the last decade Sydney's market share of international visitors declined from 53.6 % to 47.7 %<sup>7</sup>.

<sup>3</sup> Australian Bureau of Statistics (ABS, 2013) – Overseas Arrivals and Departures, June 2013

<sup>4</sup> Tourism Research Australia (2010) – Regional Tourism Employment in Australia, 2008/9

<sup>5</sup> Tourism Research Australia (2013) – International and National Visitor Surveys, June Quarter 2013

<sup>6</sup> Tourism Forecasting Committee, *Forecast 2013 Issue 1, 2013*

<sup>7</sup> Tourism Research Australia, *International Visitor Survey, Year Ending June 2013*



## Conservation values

The conservation values of Sydney Harbour National Landscape along with their threats and suggested mitigation measures are presented in the following tables:

ENVIRONMENTAL		
Values	Threats	Mitigation measures
Thriving marine environment	Degradation of the environment via commercial or recreational activities	<ul style="list-style-type: none"> <li>Better monitoring of the marine and land environments to identify changes to the landscape early</li> <li>Education programs targeted at improving recreation and commercial use of the environment</li> <li>Community conservation programs as direct action measures</li> <li>Promote sustainable practices</li> <li>Promote suitable locations and opportunities</li> </ul>
National parks and other protected areas with significant conservation values		

CULTURAL		
Values	Threats	Mitigation measures
The spiritual connection of Traditional Owners and custodians with the Landscape	Loss of connectivity Conflicting values	<ul style="list-style-type: none"> <li>Partnerships with Traditional Owners, Government and Industry</li> </ul>
Aboriginal sites of significance in the Landscape	Degradation of the sites through human interaction and/or natural forces	<ul style="list-style-type: none"> <li>Undertake conservation activities with resource managers such as NSW NPWS</li> <li>Visitor awareness programs aimed at reducing the impact of visitor activities</li> <li>Focus on volunteer programs to assist with site enhancement and maintenance</li> </ul>
Heritage sites of significance (including World Heritage Listed sites)	Degradation of the sites through human interactions and/or natural forces	<ul style="list-style-type: none"> <li>Improve visitor infrastructure to reduce impact on heritage buildings and other sites</li> <li>Visitor awareness programs aimed at reducing the impact of visitor activities</li> <li>Innovative interpretation (e.g. not necessarily on-site)</li> </ul>

# THE TARGET AUDIENCE – EXPERIENCE SEEKERS

The target market for Australia's National Landscapes Program is the *Experience Seeker* market.

*Experience Seekers* are a varied market differing by age, country of origin and spending power, but united by values, attitudes and motivations.

They are typically well educated, motivated by opportunities for personal growth, fulfilment and learning, and discerning about experiences, especially the presentation of natural and cultural heritage.

*Experience Seekers* look for the following opportunities in a destination:

- Authenticity
- Interaction with and immersion in people, culture and places
- Points of difference
- Physical and emotional challenges
- Learning opportunities.

Recent research by Tourism Australia shows that international *Experience Seekers* are attracted to Australia strongly by the promise of water. The world-class beaches of Bondi, Manly and Coogee, sailing or cruising on Port Jackson are examples of experiences that deliver to the market.

Seven experience pillars identified by Tourism Australia are thought to motivate *Experience Seekers* and other visitors to travel here:

- 1 **Nature in Australia**
- 2 **Aboriginal Australia**
- 3 **Journeys through Australia**
- 4 **Outback Australia**
- 5 **Australian Coastal Lifestyle**
- 6 **Australian Major Cities**
- 7 **Food and Wine**

Sydney Harbour delivers on all but the Outback. This is more than any of the other National Landscapes. An assessment of how Sydney Harbour National Landscape stacks up against these motivators is expressed in the following table and explained in more detail in the following sections of the strategy.

It shows that whilst Sydney performs well against most of the factors there is scope to improve Sydney's appeal to the International *Experience Seeker* through enhancing "nature", "Aboriginal" and "journeys" experiences.

MOTIVATORS FOR TRAVEL	CURRENT PERCEPTION	POTENTIAL OFFERING	STRATEGY
Nature in Australia	✓✓✓	✓✓✓✓	Enhance
Aboriginal Australia	✓✓	✓✓✓✓	Enhance
Journeys through Australia	✓✓✓	✓✓✓✓✓	Enhance
Outback Australia	–	–	NA
Australian Coastal Lifestyle	✓✓✓✓✓	✓✓✓✓✓	Maintain
Australian Major Cities	✓✓✓✓✓	✓✓✓✓✓	Maintain
Food and Wine	✓✓✓✓	✓✓✓✓	Maintain

Source: TRC Tourism, 2013

## What is the size of the market?

*Experience Seekers* constitute between 26–50% of outbound travellers.

However, it is estimated the same group only constitutes between five to 15% of the total inbound market to Australia.

This equates to there being approximately 280,000 – 850,000 inbound *Experience Seekers* each year (TRC Tourism, 2013).

# STRATEGY OVERVIEW

## Vision for Sydney Harbour National Landscape



**Sydney Harbour National Landscape will be internationally renowned for its spellbinding natural and cultural experiences. Visitors will leave with a deep connection with the Landscape, understanding of its cultural and environmental values and be truly inspired by Australia's gateway landscape.**

This vision has guided the direction of the Experience Development Strategy for Sydney Harbour National Landscape

### Strategy overview

The strategy is described in themes, hero experiences and projects.

#### Themes:

The visitor experiences that have the greatest potential for Sydney Harbour National Landscape are described through three themes. Each of the themes meets the objectives of Australia's National Landscape Program by linking conservation with tourism through activities, events, attractions and tours.

The first of these themes, **Explore nature on our doorstep**, is all about the striking juxtaposition of Sydney and its surrounding environment. The second, **Discover our ancient culture** is based on Aboriginal culture, past and present in the context of a large modern city. The third theme, **Relive our history**, is about the colourful colonial history of our landscape and its heritage attractions including World Heritage listings.

These themes have also shaped the lifestyles and values of the people that live in it. Across all three themes, visitors can experience the contrast between their own lives and that of the locals.

#### Hero experiences:

Hero experiences are the standout experiences within each of the three themes. Eight hero experiences were identified for Sydney Harbour National Landscape. These are outlined in the diagram on the next page.

Hero experiences are those that best reflect a destination's brand promise and positioning in the market. They help define the place, its people and stories. Hero experiences showcase points of difference from the landscape and help drive conversion – meaning they have the pulling power to make a visitor decide to visit the destination.

While one destination may share features with other destination such as wildlife, geology, ancient rainforests, historic buildings and heritage sites – a hero experience will offer it in a way that is distinctive.

Some examples from other National Landscapes include:

- Swimming with the whale sharks on the Ningaloo Reef
- Diving and snorkelling the Great Barrier Reef
- Cruising along the Kimberley Coast or driving the Gibb River Road
- Having the best vantage point to watch the ancient cinema of light on rock in the Red Centre.

A pre-requisite is that a hero experience must align with and support the positioning of the National Landscape. It also needs to:

- Be distinctive
- Play to our competitive advantage on a world stage
- Have a conservation dividend.

#### Projects:

Projects have been proposed to activate each of the hero experiences within the Landscape. The projects were determined based on their:

- Linkages with conservation and culture
- Alignment with the brand of Sydney Harbour National Landscape
- Market appeal to *Experience Seekers*.



# Spellbinding SYDNEY HARBOUR NATIONAL LANDSCAPE

## Themes

### EXPLORE nature on our doorstep



### DISCOVER our ancient culture



### RELIVE our history



## Hero experiences



The best harbour walking experience in the world



Explore the underwater world of Port Jackson



Get hands-on with the Landscape's wildlife



Remarkable journeys on Pittwater



The splendour of the Royal Coast Track



Feel welcome like you never have before



Get to know the landscape with those that know it best



Enthralled by stories of early Australia

## Projects

Create the best harbour walking experience in the world

Develop Australia's gateway marine life encounter

Develop a world-class conservation program in Sydney Harbour National Landscape that visitors can get involved with

Establish a world-class journey on Pittwater

Turn the Royal Coast Track into Australia's premier coastal trail experience

Develop a one-of-a-kind contemporary Welcome to Country Aboriginal experience that will inspire

Develop a unique Aboriginal tour guide program that provides visitors with an unforgettable connection with the Landscape and the world's oldest living culture

Develop two new immersive experiences that tell the story of early Australia

THEME

1

# Nature on our doorstep



## THEME 1

# Explore nature on our doorstep

Australia's emerald city, Sydney, rates as one of the most stunning harbour cities in the world. It is Australia's major gateway and presents the best first impression that most visitors could hope for. That is, a vibrant and colourful modern city surrounded by iconic images of Australia such as waterways, world-class beaches, bushland and wildlife, sandstone outcrops and headlands. Visitors can easily escape the city for solitude and to connect with nature in secluded bays and bushland.

The Landscape's boundary is marked by Royal, Sydney Harbour and Ku-ring-gai Chase National Parks. Other major conservation sites include Taronga Zoo and the Royal Botanic Gardens. Commercial tour operators and organisations use these locations to provide a wide range of nature-based experiences for visitors. These experiences include guided day and overnight walks, island camping, wildlife encounters, sea kayaking, diving, snorkelling and marine life tours. Whale watching is a standout for Sydney Harbour National Landscape and only Vancouver and San Francisco would compare as major cities where whales can be seen easily by boat and from the land.

Chance encounters with wildlife are also a real standout for visitors. Noisy parakeets and galahs, dolphins beside the ferries, lizards and geckos sunning themselves on rocky outcrops, little penguins scurrying up beaches and under wharves, glimpses of wallabies while in the bush and cormorants diving for fish surprise visitors and are particularly memorable for their setting within an urban environment.

## The opportunity

There is an opportunity to add value to many of the existing assets and attractions within the Landscape through innovative packaging, industry and government partnerships and improved visitor facilities and infrastructure.

## Observations

### Limited opportunities to journey through the Landscape

Industry feedback is that there is a need to better package together experiences within the Landscape.

### Low profile of walking opportunities

Sydney Harbour National Landscape offers possibly the best opportunities for quality day and overnight walks of any major city in the world. Most of these opportunities are managed for natural and cultural heritage conservation.

### Opportunity to raise awareness of Sydney Harbour's marine environment

The website for Underwater Sydney says it all: *'Sydney has better marine life than any other city on the planet. From seadragons to sharks, pufferfish to penguins, Sydney has it all. But discovering it all in person can be a little challenging.'*

Sydney Aquarium, Manly Sea Life Sanctuary, Sydney Institute of Marine Sciences, dive operators and others play an important part in conveying messages, providing visitor experiences and undertaking research on Sydney Harbour's marine environment. There is further scope to provide engaging and highly educational activities for *Experience Seekers* in this special environment.

### The challenge of providing nature-based experiences in and around a big city

While outstanding natural experiences are available on Sydney's doorstep, the perception of *Experience Seekers* is that they are coming to a city. They know about, and some would have already planned to visit, other magnificent natural and cultural attractions located elsewhere in Australia. This is a market reality. *It means that the wonderful opportunities available in Sydney Harbour National Landscape may not be on the radar of Experience Seekers. Our challenge is to entice more of these travellers to enjoy the wider landscape.*



# Hero EXPERIENCE 1

The best harbour experiences in the world



This hero experience is about developing the best overnight harbour walking experiences in the world where visitors can:

Catch a ferry across to Taronga Zoo and enjoy a stunning walk to Manly. Meander around headlands and sheltered bays with magnificent harbour views, parks and historic houses before reaching Manly for an overnight stay at Q Station. Enjoy a dazzling sunrise at North Head in the morning before catching a boat across to Watsons Bay for a walk to The Gap and South Head before returning to stay a night at Watsons Bay or alternately carry onto Nielsen Park to catch a boat back to Circular Quay.

# Hero EXPERIENCE 2

Remarkable journeys on Pittwater



Pittwater is truly spellbinding. Made up of secluded bays, fingers of bushland running down to the water, Aboriginal rock art sites, small islands and the mighty Hawkesbury River, it offers potential hero experiences only a short distance north of the city that could encompass:

Travel to Pittwater, transferring to kayaks and paddling with Aboriginal guides to a secluded bay for an overnight camp. Continuing on the next day, stopping at islands that includes helping out conservationists with the little penguin colony on Lion Island and seeing Aboriginal and historic sites before another overnight stop. A short walk above the camp provides amazing sunset views.

OR:

A seaplane flight or tall ship voyage to Pittwater to start an overnight trail linking ridge lines, secluded bays, private accommodation, stunning viewpoints to catch the rising or setting sun. Return via seaplane, tall ship or shuttle, watching for whales along the way.

# Hero EXPERIENCE 3

Explore the underwater world of Port Jackson



Sydney Harbour National Landscape has the most diverse marine life of any major city in the world. The hero experience to be developed involves:

An amazing half to full-day encounter with the marine life of Port Jackson, taking visitors on a journey on and under the water. Expert marine scientists coupled with clever technology provide a Jacques Cousteau-like journey of discovery. This activity would enable *Experience Seekers* to go to or at least see live images from parts of the harbour that they could not do on their own. A citizen science program would also enable international visitors to actively engage in practical research and monitoring projects.

# Hero EXPERIENCE 4

The splendour of the Royal Coast Track



Australia's premier coastal walk lies along the Royal Coast Track. Less than an hour from the city, the Royal Coast Track provides a stunning contrast for an international *Experience Seeker*. Here's the hero experience:

Take a guided two-day trip along the Track. Start at Bundeena, explore Jibbon Head and carry on south to Otford staying overnight in exclusive eco-friendly accommodation. See whales from the cliff tops, encounter native wildlife along the way, discover Aboriginal rock art, waterfalls and streams, witness the power of the Tasman Sea and enjoy the serenity under the stars, oblivious to Sydney's five million residents less than an hour away.





# Hero EXPERIENCE 5

Get hands-on with the Landscape's wildlife



Sydney Harbour National Landscape is committed to becoming a world leader in conservation through conserving the environmental and cultural values that can be appreciated in the Landscape today. This experience lets visitors get up close and personal with the conservation efforts being undertaken across the Landscape where they will:

Join an enthusiastic group of like-minded conservationists on a multi-day program to roll-up your sleeves and work hands-on to conserve the environmental values of the Landscape. Through the guidance of expert conservationists, you can contribute meaningfully by monitoring the red-crowned toadlet and powerful owl populations and help to restore their habitats so they can continue to survive in such close proximity to a major cosmopolitan city. The experience lasts long after the visit with opportunities to keep in touch with the wildlife monitoring projects and the local people involved.





# PROJECTS

## 1 Create the world's best harbour walking experience

### Description

This project is about creating the world's best harbour walk around Port Jackson. It involves the tourism industry leveraging off the existing trail network by creating an itinerary that can be undertaken as both a day trip, but preferably as an overnight experience. Although Sydney residents know about the harbour walks, most *Experience Seekers* have no idea these trails exist and that they can access nature within easy reach of the inner city.

One standout self-guided itinerary is suggested and variations on this could be established. This involves ferry access to Taronga Zoo and walking around headlands and bays, past The Spit and onto Manly. Visitors could stay overnight there or at Q Station heritage accommodation in order to witness the stunning sunrise from North Head the next morning. From there, a boat trip across the harbour to Watsons Bay would enable visitors to access South Head, thereby completing a most amazing circuit at the entrance to Port Jackson. In season, whales are easily seen from these vantage points. Return to the city would take in The Gap and Nielsen Park – a quintessential part of the inner harbour.

This itinerary could be undertaken now but it is not currently packaged, branded or positioned so that *Experience Seekers* can easily 'buy now'. It would not be an exclusive operation but rather it will become a well-known circuit that multiple businesses would support and benefit from (much like the Great Ocean Walk).

### Why is this needed?

Day and overnight walking are in the top three activities of *Experience Seekers*. Sydney Harbour National Landscape is better positioned than most places in the world to make this happen because of the configuration of Port Jackson. Being close to water is also one of the top motivators for visitors to Australia but also for those on walking trails. There are generally low environmental impacts associated with walking trails and positive opportunities to experience parts of Sydney Harbour National Park.

This is an opportunity to leverage off the outstanding work undertaken by Sydney Walking Volunteers, NSW Parks and Wildlife Service (NSW NPWS), Sydney Harbour Foreshore Authority, Royal Botanic Gardens and multiple other agencies in creating such an extensive trail network is largely not known to international *Experience Seekers*.



### Enabling Actions for this Project

- Establish and refine the itinerary
- Brand and market the experience
- Provide a simple self-guided map or app and on-the-ground interpretation of the outstanding natural and cultural stories of the landscape.

### Outcomes

- Greater use and recognition by international *Experience Seekers* of the grandeur of Port Jackson and Sydney Harbour National Landscape
- The most easily accessible and spellbinding activity for *Experience Seekers* in the landscape.

### Stakeholders

NSW NPWS, Destination NSW, Industry, Sydney Harbour Federation Trust, Local Councils, Premier's Council for Active Living, The Walking Volunteers, Sydney Coastal Councils Group.





# PROJECTS

## 2 Establish a world-class journey on Pittwater

### Description:

This project is to establish a world-class journey in and around the Pittwater / West Head – Cowan Water – Hawkesbury River area of Ku-ring-gai National Park. It involves industry and land management agencies working closely together to create the infrastructure and services required for a two to three day water and land based experience.

There are two options for the development of the trail. A preferred option is yet to be determined and both are outlined below.

### **Option 1: A guided multi-day kayak journey connecting the lower Hawkesbury and Pittwater catchments, Ku-ring-gai National Park and Aboriginal rock art sites.**

This option is to develop a kayak trail through the inland waters of Broken Bay and the Hawkesbury River. These areas boast secluded waterways, pockets of bush, Aboriginal rock art sites, islands, wilderness and wildlife. The tour would be undertaken by Aboriginal guides that would link in the Aboriginal stories of the Landscape. A conservation activity will be included in the itinerary such as supporting research of the little penguin colony on Lion Island.

Accommodation could include safari-style camps, basic eco-camps or the use of existing private accommodation. This option is at a conceptual stage and further scoping is required to determine its specific itinerary.

### **Option 2: A walking trail combining boat access and private accommodation.**

The Pittwater / West Head – Cowan Water – Hawkesbury River area offers the chance to link existing trails and accommodation nodes into a distinctive multi-day journey through the Landscape. It is believed that this would require only limited public infrastructure if it can link with existing accommodation and boat access.

Further scoping is required to determine the visitor experience and location of this trail more specifically. Refer to the Queen Charlotte Track text box for an example of a concept that could be adapted for this location.

### Why is this needed?

Feedback from industry has been that *Experience Seekers* could have even richer experiences if some of the distinctive sites and attractions were better linked together. The project provides an opportunity to link these sites and attractions together in a themed journey.

It has been suggested by industry that there may be latent demand for nature-based multi-day experiences in the Landscape and that this experience will meet that demand.

### Enabling Actions

- Undertake a feasibility assessment for both options. This should be done in close consultation with industry and the Aboriginal community
- Pursue partnerships to provide support services and product associated with the sites including water access/transport. Opportunities may also be linked into existing accommodation at Pittwater and access to Patonga.

### Outcomes

- A world-class journey in Pittwater targeted at the *Experience Seeker* market
- Increased profile of the nature-based experiences in Pittwater and flow-on effect of increased visitation as a result
- Leveraged investment in product, services and infrastructure to support the trail and its visitors
- Conservation benefits attained through the voluntourism component of the journey.

### Stakeholders

NSW NPWS, Industry, Local Councils, Aboriginal communities, Local Aboriginal Land Council.

### CASE STUDY

The Queen Charlotte Track in NZ combines boat access, private accommodation options from camping to high-end lodges, walk and bike options into a popular multiday experience. It has become a success story for industry collaboration, packaging and partnership with land management agencies. With over 30,000 visitors each year it generates close to A\$9 million in visitor expenditure and supports over 100 jobs in the local economy. A levy on each boat ticket goes into maintenance of the track.





# PROJECTS

## 3 Develop Australia's gateway marine life encounter

### Description

This project is about exploring options for establishing leading marine life tours as well as a citizen science program to better showcase the underwater world of Port Jackson.

It is about organisations and industry working together to identify suitable marine life experiences and then develop them. This can be achieved through forming strong partnerships across organisations such as Sydney Institute of Marine Science (SIMS), Sydney Aquarium, Manly Sealife Sanctuary and NSW NPWS.

Potential experiences for consideration that appeal to *Experience Seekers* include:

- Develop half to full-day journey to a variety of sites where visitors can interact with marine life e.g. Clark Island, Watsons Bay, North Head, Chowder Bay, Shelly Beach and Bare Island
- Develop a 'citizen science' program at the planned interpretation centre in Chowder Bay where visitors can immerse themselves in conservation projects related to the marine environment
- Active participation with snorkelling and shore / reef exploration with a contribution back to research as part of the operator fees
- Develop programs for active participation in marine conservation or research projects by conservation volunteers and use respected scientists to provide professional credibility around the conservation story and challenges of marine conservation in a large city.

### Why is this needed?

Sydney is considered to have the most diverse marine life of any major city in the world. It requires ongoing community, government and industry support to maintain a healthy status. Tourism can contribute to researching, protecting and managing the marine environment. *Experience Seekers* are an ideal audience in this regard.

The Sydney Aquarium, Manly Sealife Sanctuary and SIMS – along with dive operators, volunteer groups and members of the community – all provide opportunities for experiencing the underwater world of Port Jackson.

There is interest amongst these stakeholders to further investigate the options for *Experience Seekers* to gain hands-on, highly informative and engaging encounters within Port Jackson's marine environment.



### Enabling Actions

- Use an informal working partnerships between SIMS, NSW NPWS and industry to assess potential market demand from *Experience Seekers* to engage in marine life tours and citizen science programs
- Design and undertake a series of pilot tours
- Assist SIMS in partnering with industry to develop engaging marine life tours and potential volunteer tourism programs.

### Outcomes

- Increased awareness and profile of the marine life in Port Jackson as well as the conservation activities undertaken to preserve the marine environment
- Opportunity for visitors to learn about the pressures placed on the marine environment and what can be done to mitigate environmental threats
- Greater access for visitors to the underwater world of Port Jackson.

### Stakeholders:

NSW NPWS, volunteer groups, Sydney Coastal Councils Group.





# PROJECTS

## 4 Turn the Royal Coast Track into Australia's premier coastal trail experience

### Description

This project is to turn the Royal Coastal Track in Royal National Park into Australia's premier coastal trail by making it an exceptional overnight walk that is easily accessible for the *Experience Seeker* market. The Royal Coast Track is a point-to-point walk that runs from Bundeena to Otford. Whilst the Track already exists and is popular with local markets, there is an opportunity to take the Track to a new level and provide a truly outstanding experience for the *Experience Seeker* market.

The Royal Coast Track Strategic Implementation Framework provides the blueprint for developing the Track to this standard. Improvements outlined in the framework will ensure that the overnight walk provides a high quality visitor experience, one that can be undertaken independently or through commercial tour operators.

Improvements required to the track include:

- Significant investment in infrastructure to create a safe and sustainable walking track
- Two overnight precincts established as public/private partnerships that offer high quality sustainable semi-permanent eco-accommodation and camping areas separated from roofed accommodation with tent platforms, appropriate amenities and cooking shelters
- Establishing and maintaining separate overnight nodes for groups
- Managing overnight numbers through a booking system.

### Why is it needed?

The Royal Coast Track offers a wonderful way to experience the world's second oldest national park and Australia's oldest. Currently popular with the local community, with appropriate upgrading, accommodation, interpretation and packaged opportunities, the Royal Coast Track can become an exceptional overnight walk that is easily accessible for the *Experience Seeker* market.

By making it a short but immersive experience, the Royal Coastal Track will be different to the various longer walks on offer elsewhere and will be sufficiently compelling to include in a Sydney itinerary.

Improvements to the Royal Coast Track will result in:

- A high quality visitor experience that will attract new and higher yield visitor markets (e.g. *Experience Seekers*) as well as current visitors
- Infrastructure that will offer opportunities for public/private partnerships and business development opportunities in the delivery of a greater range of visitor experiences
- Significant improvements to conservation and environmental management through establishment of a sustainable track surface and campsites with restoration of degraded areas.

### Enabling actions

Seek funding to implement the Royal Coast Track Strategic Implementation Framework.

### Outcomes

- Increased awareness and profile of the Royal National Park and in particular the natural and cultural values of the Royal Coastal Track
- Leveraged investment in product, services and infrastructure to support additional visitors along the Royal Coastal Track.

### Stakeholders

NSW NPWS, Industry, Local Councils, Friends of the Royal National Park, Premier's Council for Active Living.





# PROJECTS

## 5 Develop a world-class conservation program in Sydney Harbour National Landscape that visitors can get involved with

### Description

This project is about developing a world-class conservation program within Sydney Harbour National Landscape where *Experience Seekers* can get involved in conservation activities. The program will provide real ecological benefits for the Landscape with the focus being on the conservation of species like the red-crowned toadlet and powerful owl.

Conservation efforts may include measuring populations, monitoring behaviour or undertaking habitat protection. Regardless of the activity visitors will participate in a scheduled and supervised multi-day program run by expert conservationists. The length of the program will vary according to the activities being undertaken. It could range from day activities to longer week-long itineraries.

### Why is it needed?

At present there is limited scope in Sydney Harbour National Landscape for *Experience Seekers* to get involved in efforts to conserve the environmental and/or cultural values of the Landscape. Although a niche activity, there is growing demand for voluntourism conservation projects by international visitors in Australia, New Zealand, South and South East Asia and South America.

This project provides an opportunity for visitors to roll their sleeves up and participate in conservation efforts. The program will also provide real conservation outcomes as well as generate greater awareness of the environmental and cultural risks in the Landscape and how they are being managed.



### Enabling Actions

- Conservation Volunteers Australia (CVA) recently attained a Commonwealth Government grant to undertake a study into potential conservation programs for Sydney Harbour National Landscape. A Project Manager is being appointed by CVA to manage this study.
- It is recommended that the Sydney Harbour National Landscape Committee work closely with CVA and the appointed Project Manager to identify, assess and develop an appropriate conservation program for the Landscape that international *Experience Seekers* can participate in.
- Appropriate operators will then need to be identified and commissioned to help deliver the conservation program.
- Product will then need to be packaged and marketed.

### Outcomes

- A world-class conservation program that visitors can immerse themselves in.
- Ecological outcomes, including conserving the habitat and populations of the red-crowned toadlet and powerful owl.
- Greater awareness of the risks to protected animals in the Landscape and the conservation activities being undertaken to mitigate these risks.

### Stakeholders:

Conservation Volunteers Australia, NSW NPWS, volunteer groups, Taronga Conservation Society, Foundation for National Parks and Wildlife.

THEME

2

*Discover our ancient culture*



## THEME 2

# Discover our ancient culture

Australia has the oldest continuing culture in the world. Stories of past and present are told throughout the Landscape in a variety of ways. This includes organised tours and performances, via Aboriginal sites of significance, as well as within the Landscapes' many museums, galleries and parks.

While Indigenous stories are told across other National Landscapes, there are a number of differences that make the Sydney Harbour National Landscape experience distinctive. The Landscape protects ancient Aboriginal sites and stories, as well as providing contemporary expressions of Aboriginal culture through interpretation, performance and arts.

## The opportunity

It is believed there is demand for Aboriginal tourism product in Sydney Harbour National Landscape. In particular, there is an opportunity to develop Aboriginal experiences that share ancient culture in a contemporary setting. Modern ideas, styles, technology and themes could be used to tell the Aboriginal stories of the Landscape in ways that are truly spellbinding and distinguishable from the other National Landscapes.

As the gateway city, there is also an opportunity for Sydney Harbour National Landscape to 'Welcome visitors to Country' and to facilitate and promote participation in Indigenous experiences across all the other National Landscapes.

## Observations

### **Aboriginal tourism development has a strong focus within the Landscape**

- There are numerous organisations tasked with supporting and encouraging the development of Aboriginal tourism product within the Landscape. This includes the public sector, not-for-profit sector as well as private enterprise.
- Destination NSW, NSW NPWS and Tourism Australia all have programs and initiatives aimed at supporting Aboriginal tourism in the Landscape. Examples include the NSW NPWS Aboriginal Discovery program and the Indigenous Tourism Champions Program instigated by Tourism Australia and Indigenous Business Australia.

### **Tour operators have visions to expand and diversify**

- There are a number of organisations currently providing visitors with quality Aboriginal tourism experiences in the Landscape. Several of these hope to expand and augment their product offerings and are already on the way to achieving this through existing programs e.g. the Indigenous Tourism Champions Program.

### **Limited access to Aboriginal guides**

- Non-Aboriginal tour operators have expressed an interest in including Aboriginal content within their tours. However, without access to quality Aboriginal guides they have been unable to develop suitable Aboriginal product for the market.
- There is a need for more Aboriginal tour guides to deliver authentic Aboriginal experiences across the Landscape.

### **Participation in Indigenous activities has been declining**

- Whilst visitor data points to a decline in participation in Indigenous activities within Australia, this is believed to be because of supply issues rather than a decrease in demand for these experiences.
- Feedback from tour operators suggests there is sufficient demand for Indigenous experiences to support additional product if it is well delivered, distinctive and effectively promoted.



# Hero

## EXPERIENCE 1

Feel welcome like never before



As the gateway to Australia there's a role for Sydney Harbour National Landscape to play in welcoming visitors through a special 'Welcome to Country' Aboriginal experience. That's what this hero experience is about:

**Be welcomed, inspired and awed by our ancient culture in a Welcome to Country like no other. Be captured by a leading-edge performance that blends the contemporary with the traditional and experience it all from a stunning vista in the harbour.**

# Hero

## EXPERIENCE 2

Get to know the landscape with those that know it best and leave with a new perspective on our ancient culture



There are stories hidden across the Landscape that only Aboriginal tour guides can unlock. Trained Aboriginal guides will show visitors the Landscape from an Aboriginal perspective and help them to form a deep understanding of our ancient culture and values that will last forever. This hero experience will:

**Connect visitors with our ancient culture and impart a lasting impression through the hands of trained Aboriginal guides. The guides will share captivating stories of the past and present across the Landscape that will add value to existing experiences and resonate with visitors in a meaningful and personal way.**

# PROJECTS

## 6 Develop a unique Aboriginal tour guide program that provides visitors with an unforgettable sense of connection with the Landscape and the world's oldest living culture

### Description

This project is about delivering quality Aboriginal tourism experiences across the Landscape through facilitating the training and employment of Aboriginal tour guides.

The concept is to establish a centralised organisation responsible for training, supporting and facilitating employment for Aboriginal tour guides. For the purposes of this document this organisation is described as an Aboriginal Tour Guide Academy.

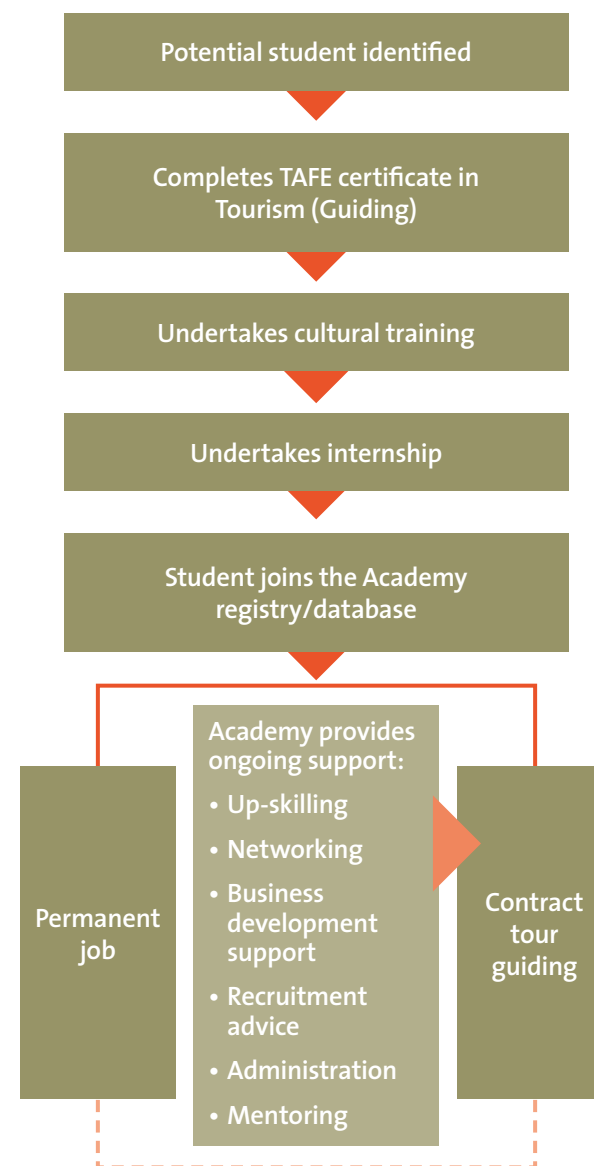
The pathways for students within the Academy are illustrated in the following diagram. It shows how students will initially complete formal training through TAFE to obtain accreditation in Tourism (Guiding) Certificate III and/or IV. The Academy (using local Aboriginal people) would then provide custom cultural training related to this region to all students that achieve this certification. This would up-skill students to be capable of and confident in delivering Aboriginal cultural interpretation. Issues of 'talking on Country' would be resolved with local Aboriginal communities.

After completing the cultural training the Academy would then arrange an internship for the students. This would be undertaken through a number of partner organisations and will provide students with valuable on the job training. The Aboriginal community would be actively engaged in this process.

The students would then qualify to join the Academy's registry / database of active students that tour operators or organisations looking to employ Aboriginal tour guides can access. Through this database operators may contact the students directly to discuss employment options or alternately the Academy could also provide support in managing these discussions and arrangements on behalf of the students. Some students may go straight into a permanent role, but likely most will be initially engaged on a contract or casual basis with tour operators. The Academy will continually support these students with mentoring, recruitment advice, networking, administration and up-skilling. The Academy would also use its profile to identify new tour guiding opportunities with operators and industry for the students.

Furthermore, the Academy will also act as network body for students to interact and engage with each other and as such foster innovation.

The management structure of the Academy is yet to be determined but it is envisaged it would have a significant representation by industry and the Aboriginal community in its design and implementation. Overtime, it is expected the Academy will become financially sustainable and would be Aboriginal owned and operated.





### Why is this needed?

There is an opportunity to better tell the Aboriginal stories of Sydney Harbour National Landscape. Many existing tour operators want to deliver this experience, but don't have access to trained, quality and local Aboriginal guides who can tell these stories.

Many of these are small tour operators that do not have the resources to train and employ a designated Aboriginal tour guide. There are also limited channels for them to access Aboriginal tour guides on a casual basis.

This project will provide a channel for tour operators to contract trained, quality and professional Aboriginal tour guides to provide interpretation on their tours. The outcome will be a significant increase in quality, authentic Aboriginal tourism product right across the Landscape.

The project also gives Aboriginal tour guides support post-training that will better enable them to enter the workforce.

### Enabling Actions

- Destination NSW has recently undertaken a pilot program for training Aboriginal tour guides. The learning from this program will provide valuable feedback on the design of the Academy.
- Scoping of the opportunity would then need to be completed to estimate how the Academy would best be established and function, as well as what resources would be required to support it. Specific consideration should be given to how it could link with or build upon Destination NSW's pilot program.
- Sufficient resources would then need to be secured and the program implemented.
- The commitment of industry and Aboriginal tourism organisations is vital for the success of the project. Planning for the Academy must consider any conflicts of interest with existing Aboriginal tour guides and tourism businesses. In particular the competitive neutrality of the project would need to be assessed.

### Outcome

- Increased Indigenous employment and business participation in the tourism sector
- Greater profile and accessibility of quality Aboriginal experiences in the Landscape
- Higher standard of Aboriginal interpretation and guiding delivered across the Landscape and enriched visitor experiences.

### Stakeholders

NSW NPWS, Destination NSW, Indigenous Business Australia, Industry, TAFE, Local Aboriginal Land Councils, Aboriginal communities and organisations.



# PROJECTS

## 7 Develop a one-of-a-kind contemporary Welcome to Country Aboriginal experience that will inspire and amaze

### Description

This project is to develop an Aboriginal 'Welcome to Country' within the Landscape. This performance would be leading edge, innovative and highly contemporary and would set the benchmark for Indigenous performances across Asia-Pacific.

It would be delivered at a regular time and would inspire and educate visitors so they will understand and appreciate the traditional meaning of being 'Welcomed' to Aboriginal lands. This will enhance visitors' confidence and inclination to participate in other Indigenous experiences across the other National Landscapes.

The setting for the Welcome to Country should be spectacular, have Aboriginal significance, be easy to access, as well as have the potential to include broader Aboriginal experiences. It is envisaged that one day the site could represent an Aboriginal tourism precinct with a range of other Aboriginal experiences on offer. These might include:

- The opportunity to engage with authentic artists – Aboriginal artists could use the precinct to create, display and sell their artworks. This provides a medium, far from the souvenir shops in Circular Quay, for visitors to learn about Aboriginal art in an authentic way.
- Cultural talks and tours – tours of the precinct and surrounds with interpretation on different aspects of Aboriginal culture.

### Why is this needed?

As the gateway city, there is an opportunity for Sydney Harbour National Landscape to play a role in welcoming visitors to Country and providing them with an inspiring Aboriginal experience that will encourage visitors to seek out other Indigenous experiences during their travels to other Landscapes.

There is also a need to increase the profile of Aboriginal experiences within the Landscape.

### Enabling actions

- This project is at a conceptual stage and further assessment / evaluation is required to determine its feasibility.
- In the first instance a suitable location would need to be identified.
- A feasibility assessment would then need to be undertaken. The assessment would outline the requirements of the project and identify any impediments and ways to overcome them.
- Following consideration of the feasibility assessment a suitable operator(s) would need to be identified and form agreement with relevant land managers on the suitable use of the site.
- The development and delivery of the experience would then become the responsibility of the selected operator(s). However, their activities at the location would be regulated through usage agreements.

### Outcome

- A one-of-a-kind contemporary Aboriginal experience developed and delivered to welcome visitors to Country
- Increased profile of Aboriginal culture within the Landscape
- Increased Indigenous employment in the tourism sector
- Leveraged investment in other Aboriginal tourism product and services across the Landscape
- Promote participation in other Indigenous tourism experiences within other National Landscapes.

### Stakeholders

NSW NPWS, Industry, Local Aboriginal Land Councils, Aboriginal communities and organisations.



THEME

3



*Relive our history*



## THEME 3

# Relive our history

Sydney Harbour National Landscape has a colourful history. Three of the sites that make up the World Heritage Australian Convict Sites sit within the heart of the Landscape. These are Old Government House and Domain, Hyde Park Barracks and Cockatoo Island. They are reminders of this history and are popular visitor attractions today.

This theme is about engaging *Experience Seekers* to relive our history and stories of the past from Captain Cook's exploration, the meeting of two cultures, early settlement and colonisation of Sydney to the making of the 'lucky country' and Australia as it is today.

## The opportunity

Our history is best showcased to visitors through stories of our past that are fresh, exciting and more reflective of who we are. This would add significant value to our existing heritage sites, education programs and on-site interpretation.

We envisage that the big stories behind our historic sites could become highly appealing to international visitors through theatre, improvisation storytelling, technology, carefully designed role play and of course our 'Aussie' humour (refer to the Vancouver case study in the Appendix). Getting visitors actively engaged with stories of the past will enable them to 'relive our history' and experience what it was like to arrive and live in early Australia.

## Observations

### **We can bring our history alive**

Most interpretation and information at historical attractions in the landscape is fairly static. This serves an important purpose for some visitors, while for others there needs to be more tactile, engaging and active experiences on offer.

### **The big stories and sites are spread around the landscape**

Sites and events associated with the Landscape's colonial period are scattered from Parramatta to Port Jackson and to points further north and south. Unless visitors have a strong interest in history, these significant components of the Landscape are not highly visible to international *Experience Seekers*. In addition, these sites are not linked or packaged together for *Experience Seekers*.



# Hero EXPERIENCE 1

Enthralled by stories of early Australia



Two experiences have been identified for further development. Both are linked through historical events but offer quite different experiences. The first of these centres on historical sites within the inner harbour:

- (i) Embark on an engaging guided tour across Sydney's leading heritage sites such as Hyde Park Barracks, Fort Denison, Cockatoo Island and hidden fortifications. Through theatre, improvisation, technology and a good dose of Aussie humour, be taken back in time to experience what it was like to live in early Australia. The tour will leave inhibitions behind as guests take on the role of various characters from early Australia.

The second experience re-traces the exploration of the Hawkesbury River by early settlers. Emotively told by Kate Grenville in *The Secret River*, this experience gives visitors an insight into life in early Australia:

- (ii) A remarkable overnight journey by historic tall ship from Port Jackson, out through the Heads and north along the coast to the Hawkesbury River. Journeying further up the Hawkesbury River, visitors would get the chance to experience how the early settlers explored, lived and survived. This experience is all about stimulating a sense of discovery and imagination. The tall ship would overnight in sheltered waters in the lower Hawkesbury or Pittwater before returning to Port Jackson.

# PROJECTS

## 8 Develop two new experiences that will reinvent the way visitors feel, think and relate to early Australia

### Description

This project will introduce two new experiences into the Landscape. The first involves a potential collaboration between Sydney Living Museums, Sydney Harbour Federation Trust, theatre companies and tourism operators to create an edgy, highly engaging and entertaining experience based on Australia's colonial past. This will require innovation in the ways in which stories of early Australia are told and presented. Multiple sites including Hyde Park Barracks, Fort Denison and fortifications currently not accessible to visitors could be packaged by the tour. Alternatively, key events that took place during the 1800s and early 1900s could be recreated using a street theatre or improvisation approach. Thus the program of tours or experiences could be regularly changed and refreshed, alternating between site-based experiences and those based on events.

The tour will leave inhibitions behind as guests take on the role of various characters from early Australia to relive and star in a scripted story. Through carefully constructed activities guests will participate like they never have before to relive Australia in the early to mid 1800's.

The second experience involves working with the operators of tall ships to recreate an overnight journey from Port Jackson to the Hawkesbury River. Visitors will get the chance to experience how the early pioneers explored, lived and survived in the 'new country'.

### Why is this needed?

Early history – for any nation – can easily be overlooked or considered dull and boring from a visitor perspective. And yet there is a rich source of material to work with when it comes to Sydney Harbour National Landscape. There are also strong historical linkages between Sydney's history and key source markets including the UK, Europe, Japan, New Zealand and the US.

The hero experiences put forward here would add value to existing attractions and stimulate new business.

### Enabling actions

- Project 1: develop an Innovations Working Group that will include representatives from the historic attractions within the Landscape to engage with theatre companies and tourism operators to develop the interactive and integrated tour of the heritage sites.
- Project 2: One of the first steps required is to assess the level of interest of tall ship operators in the proposed project. Provided there is interest, a feasibility study should then be undertaken look at how the experience could best be delivered with either set departures or special events in mind.

### Outcomes

*Experience Seekers* spread the word to others about their enriching and entertaining experience of the key historical elements associated with Sydney Harbour National Landscape.

### Stakeholders

Sydney Living Museums, Sydney Harbour Federation Trust, Industry, Destination NSW, NSW NPWS.



# ENABLING ACTIONS TO DELIVERING THE PROJECTS

There are several actions that will support the delivery of a number of the game changing projects and as such activate / improve the hero experiences in Sydney Harbour National Landscape. These have been identified as 'enabling actions'.

These are actions that can also be influenced by the Sydney Harbour National Landscape Steering Committee and industry partners / related agencies. While there are other factors that would assist in the delivery of the game changing projects, such as lowering the cost of doing business in the Landscape, these are much harder to influence and as such have not been included as crosscutting actions.

ENABLING ACTIONS					
Projects	Improve water access	More robust research on the Experience Seeker market	Ongoing capacity building for Indigenous guides and businesses	Effective collaboration across Government organisations and with industry	Experience Seeker online Portal
<b>1</b> Create the World's best harbour walking experience in Port Jackson	Y	Y	Y	Y	Y
<b>2</b> Establish a world-class journey on Pittwater	Y	Y	Y	Y	
<b>3</b> Develop Australia's gateway marine life encounter	Y	Y		Y	Y
<b>4</b> Turn the Royal Coast Track into Australia's premier coastal trail experience		Y		Y	Y
<b>5</b> Develop a unique Aboriginal tour guide program that provides visitors with an unforgettable sense of connection with the Landscape and the world's oldest living culture			Y	Y	
<b>6</b> Develop a one-of-a-kind contemporary Welcome to Country Aboriginal experience that will inspire and amaze	Y	Y	Y	Y	Y
<b>7</b> Develop two new immersive experiences that tell the story of early Australia		Y	Y	Y	Y
<b>8</b> Develop a world-class conservation program in Sydney Harbour National Landscape that visitors can get involved with				Y	Y



## Experience Seeker online portal

Presently, there is a multitude of visitor information available online. However, this information is difficult to navigate through, not targeted at the *Experience Seeker* market and is often fairly static. Many sites also have commercial or other imperatives and are not entirely consumer-focused.

There is an opportunity to improve the visit for *Experience Seekers* by putting them in touch with the experiences that they will find most revealing, meaningful and fulfilling. This may not be formal tourism product such as tours and attractions but rather, local events and activities of interest happening across the Landscape.

There's so much happening every day across the Landscape that the challenge is filtering the information to put *Experience Seekers* in touch with the very best of these experiences.

An Experience Seeker portal would provide up-to-date customised information on activities and events for the market using leading-edge techniques and practices. It's about developing an online destination that *Experience Seekers* can relate to, interact with, be inspired by and easily plan their stay in the Landscape. The portal will put *Experience Seekers* in touch with the experiences that best suit them and through the process will increase the profile of the natural and cultural experiences in the Landscape.

The portal is at a conceptual stage and its feasibility and design is yet to be determined. However, regardless of design, the information must be current, targeted and facilitate *Experience Seekers* to get off the beaten track for authentic experiences that will enrich their stay in the Landscape.

This site essentially would filter all the information and opportunities from existing resources such as websites, events listing, databases, social media and news feeds to profile the most relevant experiences. Content might also be added by a moderator, through user-generated-content or by bloggers.

## ACTION PLAN

The projects outlined in the Experience Development Strategy will deliver the hero experiences in the Landscape.

The projects are diverse and vary in the resources and planning required for their implementation. At one extreme some projects can be implemented immediately and on the other hand some projects will require significant scoping, planning and assessment before they can be implemented.

The projects to activate the hero experiences were selected due to their strong linkages between tourism and conservation (and culture), feasibility, alignment with the brand / strategy of Sydney Harbour National Landscape as well as market appeal to the *Experience Seeker* market.

Some projects have been identified as being of higher priority than others. Priority one projects are those that can be implemented in the short term or are likely to have the greatest impact.

### PRIORITY ONE PROJECTS

- Turn the Royal Coast Track into Australia's premier coastal trail experience
- Establish a world-class journey on Pittwater
- Develop a unique Aboriginal tour guide program that provides visitors with an unforgettable sense of connection with the landscape and with the world's oldest living culture
- Create the world's best harbour walking experience in Port Jackson

### PRIORITY TWO PROJECTS

- Develop Australia's gateway marine life encounter
- Develop a one-of-a-kind contemporary Welcome to Country Aboriginal experience that will inspire and amaze
- Develop two new immersive experiences that tell the story of early Australia
- Develop a world-class conservation program in Sydney Harbour National Landscape that visitors can get involved with

The following action plan sets out the scheduling, responsibilities and actions for the implementation of the projects.

PROJECT	ENABLING ACTIONS	LEAD BODY	PARTNER ORGANISATIONS	TIMEFRAME
Turn the Royal Coast Track into Australia's premier coastal trail experience	<ul style="list-style-type: none"> <li>• Increase awareness and profile of the Royal National Park and in particular the natural assets along the Royal Coastal Track</li> <li>• Leverage investment in product, services and infrastructure to support additional visitors along the Royal Coastal Track.</li> </ul>	NSW NPWS	Industry, Local Councils, Friends of the Royal National Park, Premier's Council for Active Living	2014–2016
Establish a world-class journey on Pittwater	<ul style="list-style-type: none"> <li>• Undertake a feasibility assessment of both proposed options. This should be done in close consultation with industry and the Aboriginal community</li> <li>• Pursue partnerships to provide support services and product associated with the sites including water access/transport. Opportunities may also be linked into existing accommodation at Pittwater and access to Patonga.</li> </ul>	NSW NPWS	Industry, Local Councils, Aboriginal communities, Local Aboriginal Land Council	2015–2016
Develop a unique Aboriginal tour guide program that provides visitors with an unforgettable sense of connection with the landscape and with the world's oldest living culture	<ul style="list-style-type: none"> <li>• Scope the opportunity to estimate how the Academy would best be established and function, as well as what resources would be required to support it. Specific consideration should be given to how it could link with or build upon Destination NSW's pilot program.</li> <li>• Secure sufficient resources to implement the program.</li> <li>• The commitment of industry and Aboriginal tourism organisations is vital for the success of the project. Planning for the Academy must consider any conflicts of interest with existing Aboriginal tour guides and tourism businesses.</li> </ul>	NSW NPWS	Destination NSW, Indigenous Business Australia, Industry, TAFE, Local Aboriginal Land Councils, Aboriginal communities and organisations	2014
Create the world's best harbour walking experience	<ul style="list-style-type: none"> <li>• Establish and refine the itinerary</li> <li>• Brand and market the experience</li> <li>• Provide a simple self-guided map and on-the-ground interpretation of the outstanding natural and cultural stories of the Landscape</li> </ul>	NSW NPWS	Destination NSW, Industry, Sydney Harbour Federation Trust, Local Councils, Premier's Council for Active Living, The Walking Volunteers, Sydney Coastal Councils Group	2014–2016

PROJECT	ENABLING ACTIONS	LEAD BODY	PARTNER ORGANISATIONS	TIMEFRAME
Develop Australia's gateway marine life encounter	<ul style="list-style-type: none"> <li>• Use an informal working partnerships between SIMS, NSW NPWS and industry to assess potential market demand from <i>Experience Seekers</i> to engage in marine life tours and citizen science programs</li> <li>• Design and undertake a series of pilot tours</li> <li>• Assist SIMS in partnering with industry to develop engaging marine life tours and potential volunteer tourism programs</li> </ul>	Industry, Sydney Institute of Marine Science	NSW NPWS, volunteer groups, Sydney Coastal Councils Group	2015–2016
Develop a world-class conservation program in Sydney Harbour National Landscape that visitors can get involved with	<ul style="list-style-type: none"> <li>• Work closely with CVA to identify, assess and develop an appropriate conservation program for the Landscape that international <i>Experience Seekers</i> can participate in.</li> <li>• Appropriate operators will then need to be identified and commissioned to help deliver the conservation program.</li> <li>• Product will then need to be packaged and marketed.</li> </ul>	Conservation Volunteers Australia	NSW NPWS, volunteer groups, Taronga Conservation Society, Foundation for National Parks and Wildlife	2015
Develop a one-of-a-kind contemporary Welcome to Country Aboriginal experience that will inspire and amaze	<ul style="list-style-type: none"> <li>• Identify a suitable location and engage industry partners</li> <li>• Complete a feasibility assessment to outline the requirements of the project and identify any impediments and ways to overcome them.</li> <li>• Following consideration of the feasibility assessment identify a suitable operator(s) to form agreement with relevant land managers on the suitable use of the site.</li> <li>• The development and delivery of the experience would then become the responsibility of the selected operator(s).</li> </ul>	NSW NPWS and Industry	Local Aboriginal Land Councils, Aboriginal communities and organisations	2016–2018
Develop two new experiences that will reinvent the way visitors feel, think and relate to early Australia	<ul style="list-style-type: none"> <li>• Project 1: develop an Innovations Working Group that will include representatives from the historic attractions within the Landscape to engage with theatre companies and tourism operators to develop the interactive and integrated tour of the heritage sites.</li> <li>• Project 2: One of the first steps required is to assess the level of interest of tall ship operators in the proposed project. Provided there is interest, a feasibility study should then be undertaken look at how the experience could best be delivered with either set departures or annual events in mind.</li> </ul>	Sydney Living Museums, Sydney Harbour Federation Trust	Industry, Destination NSW, NSW NPWS	2014–2015



# APPENDIX 1: VISITOR TRENDS AND BEHAVIOUR

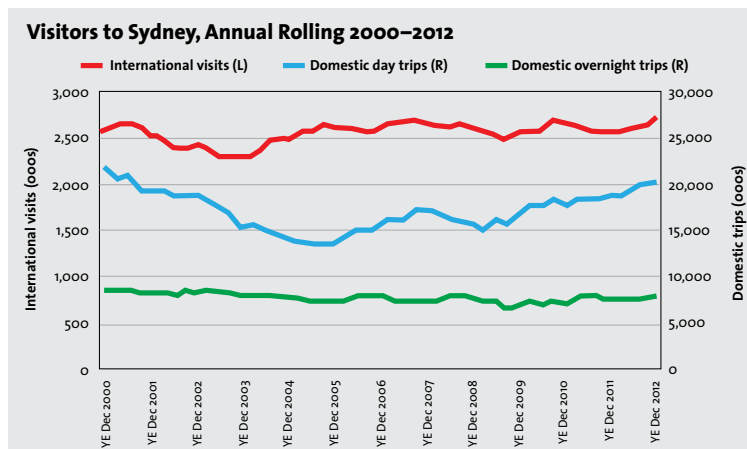
## The visitor economy

The visitor economy is an important part of Sydney's economy and it is estimated that 86,000 people are directly employed in the tourism industry in Sydney<sup>8</sup>. In 2012 visitors spent a total of \$12.9 billion in Sydney over the course of 30.8 million trips and 78.9 million nights spent in Sydney<sup>9</sup>.

### VISITOR SNAPSHOT – SYDNEY 2012/13<sup>9</sup>

VISITORS	NUMBER	EXPENDITURE	LENGTH OF STAY
International	2.8 million	\$5.9 billion	21 nights
Domestic overnight	7.7 million	\$5.3 billion	3 nights
Domestic day	18.7 million	\$2.1 billion	—

## Visitors to Sydney



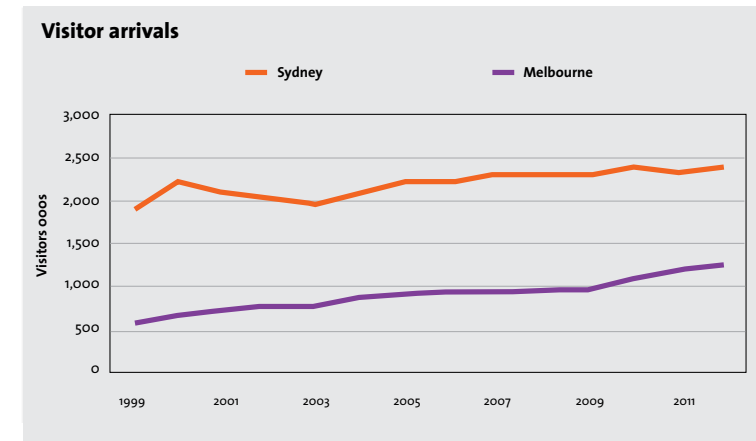
Tourism and Transport Forum analysis of Tourism Research Australia's International and National Visitor Surveys, 2013.

International and domestic overnight visitation has been steady. Day visitation has been volatile, with a recovery since 2005.

## The gateway city

Sydney is Australia's major gateway, receiving 2.6 million international visitors in 2012-13. This represents 42 per cent of all inbound arrivals<sup>10</sup>. However, this share has declined overtime, down ten points from 57 per cent in 2000 – with Sydney losing market share to competitors such as Melbourne. This is reflected in the city's average inbound visitation growth rate of 0.3% per annum, lagging behind the national average of 1.9 per cent<sup>11</sup>.

## Visitor arrivals trend line



Inbound visitor arrivals to Sydney and Melbourne<sup>10</sup>

<sup>8</sup> Tourism Research Australia (2010) – Regional Tourism Employment in Australia, 2008/9

<sup>9</sup> Tourism Research Australia (2013) – International and National Visitor Surveys, June Quarter 2013

<sup>10</sup> Australian Bureau of Statistics (ABS, 2013) – Overseas Arrivals and Departures, June 2013

<sup>11</sup> Tourism Research Australia (2013) – International and National Visitor Surveys, June Quarter 2013

# APPENDIX 1: VISITOR TRENDS AND BEHAVIOUR

## Reason for visitation

### Trip purpose

The primary motivator for visiting by the domestic market is to visit friends and relatives (40%), followed by holiday (29%) and business (26%)<sup>12</sup>. There has been little change in this pattern over the last ten years.

The primary motivator for visiting by the International market is for holiday (53%), followed by visiting friends and relatives (24%) and for business (14%). A small but growing motivator is education. Education as the primary motivator for travel has increased its market share from 2 – 5% over the last ten years.<sup>12</sup>

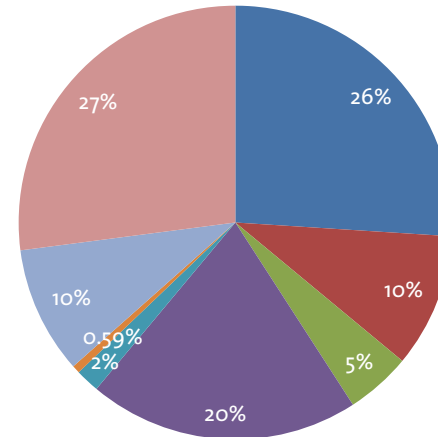
### Motivation to visit

Information from Tourism Research Australia's International and Visitor Survey (IVS) provides insight into the motivations for visitation to Australia by the international market.

The most important and second most important experiences that influenced the inbound markets' decision to visit Australia are illustrated in following graphs. A prompted list was used to determine the motivators. This list closely resembles many of the experiences that Tourism Australia believes are considerable motivators for visitation to Australia by the *Experience Seeker* market.

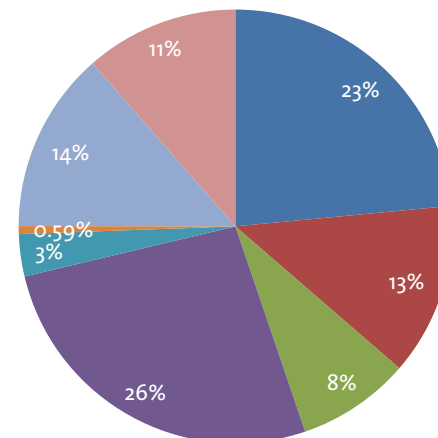
The data shows that *Australia's natural environment and wildlife* and *Australia's diverse coastal and beach experiences* are both important drivers of visitation for the inbound market. To a lesser extent is *discovering Australia's people and places*, *Australia's contemporary cities and food and wine*.

## Most important experiences that influenced decision to visit Australia (prompted responses)



### Most important experience

- Australia's diverse coastal and beach experiences
- Australia's contemporary city lifestyle
- Australia's food and wine
- Australia's natural environment and wildlife
- Australia's rural or outback experiences
- Learning about Aboriginal culture
- Discovering Australia's people and places
- None of the above



### Second most important experience

- Australia's diverse coastal and beach experiences
- Australia's contemporary city lifestyle
- Australia's food and wine
- Australia's natural environment and wildlife
- Australia's rural or outback experiences
- Learning about Aboriginal culture
- Discovering Australia's people and places
- None of the above

Tourism Research Australia's analysis of visitor motivations<sup>13</sup>

<sup>12</sup> Tourism Research Australia (2013) – International and National Visitor Surveys, June Quarter 2013

<sup>13</sup> Tourism Research Australia (2013) – Custom report prepared for TRC Tourism based on data collected from the International Visitor Survey.

## Satisfaction of experiences

The IVS also collects data on the most memorable experience of the international market. This is done using the same prompted list of experiences. Analysis of the survey results show how satisfaction compares to expectations.

It highlights that 26% of inbound visitors' most memorable experience was *Australia's natural environment and wildlife*. This is 6% higher than the number of people that identified this experience as their primary motivator for visiting Australia.

Australia's food and wine, *Australia's contemporary city lifestyle* and *discovering Australia's people* and places also scored 3-4% higher in relation to being the most memorable experience than compared to the primary motivation for coming to Australia.

However, whilst 23% of people still found *Australia's diverse coastal and beach experiences* to be their most memorable experience, this is less than the 26% that indicated this experience was their primary motivation for visitation.

EXPERIENCE	PRIMARY MOTIVATOR FOR VISIT	MOST MEMORABLE EXPERIENCE	COMPARISON
Diverse coastal and beach experiences	26%	23%	-3%
Contemporary city lifestyle	10%	13%	3%
Food and wine	5%	8%	3%
Natural environment and wildlife	20%	26%	6%
Rural or outback experiences	2%	3%	1%
Learning about Aboriginal culture	1%	1%	–
Discovering people and places	10%	14%	4%
None of above	27%	11%	-16%



## CASE STUDIES

### **Bush & Beach (Auckland)** – with relevance for packaging experiences within Sydney Harbour National Landscape

Bush and Beach is a small group eco-tour and sightseeing company that has been operating for 29 years. They have won many awards over this period including Best Small Tourism Business in New Zealand. Bush and Beach have eleven scheduled day and half day tours departing every. The tours range in duration and expense and cover a range of areas including nature tours, food and wine tours and city tours.

A popular higher end tour is to Great Barrier Island. The day begins with a thirty minute scenic flight by light plane over the Hauraki Gulf and onto Great Barrier Island. Breakfast is served at a local café followed by a walk to the Kaitoke natural thermal springs. Guests are driven to a private farm with a pristine white sand beach where they have the option to take a swim or visit the graves of those drowned in one of New Zealand's worst shipwrecks. A picnic lunch is served at a scenic location and the day rounded off with a walk to the top of Windy Canyon, offering breathtaking views of the island and beyond. Guests are flown back to Auckland at 5.30pm and dropped off to their inner city accommodation.

The tour is 11.5 hours in duration, departed the city centre at 6.45am and returning at 6.15pm. The price per adult is \$695 and includes two scenic flights, breakfast, picnic lunch and pick up and drop off at inner city accommodation. This tour is at the higher end of the company's offering, with a range of shorter and less expensive tours are on offer.

### **Forbidden Vancouver (Vancouver)** – with relevance for bringing to life the stories of early Australia

Forbidden Vancouver Walking Tours have re-invented the walking tour combining history, theatre and iconic buildings and places to create compelling and memorable experiences. Their storytellers are actors, performers, historians and improvisation comedians who love their city and love to entertain. The first tour was Prohibition City – a journey into Vancouver's dirtiest history. Next up was the Lost Souls of Gastown, added during Halloween season 2012 and now part of the regular tour program. Secrets of the Penthouse arrived in January 2013 and another tour The Granville Street Reveal in June 2013.

The original tour, Prohibition City explores the strange, corrupt and colourful history of prohibition-era Vancouver. Guests hear of the unlikely alliance of temperance campaigners and anti-saloon activists who together convinced the province to go dry back in 1917. They discover what life was like under prohibition, with stories of blind pigs, private members clubs, corruption, bootlegging, and free-flowing medicinal liquor and learn the stories of the city's most notorious mayor, LD Taylor, its most beautiful showgirl and its greatest rum-runners. On the tour guests are undercover newspaper reporters out to explore prohibition-era Vancouver. Armed with a notepad and pencil guests will tackle the mysteries of some of our city's greatest buildings, with the chance to be crowned 'top newshound'.

The tour costs \$19 for seniors and students and \$22 for adults. Each tour is approximately 90 minutes long. The tours have been a huge success, with the experience rated 5 stars out of 5 on Tripadvisor in Vancouver, making them the third highest-rated activity in Vancouver.

### **Atlantis Submarines (Hawaii)** – with relevance to potential marine life tours, Port Jackson

Atlantis Submarines have offered environmentally friendly tours around the Hawaiian Islands since 1988, playing a prominent position in Hawaii eco-tourism. The submarines are powered by batteries and during operation release no pollutants into the water or air.

The submarine tours allow visitors to see firsthand thousands of fish attracted to the Atlantis Reef as well as sunken ships, remnants of hurricane swept airliners and pyramid structures. There are three tour locations, Waikiki, Kona, and Maui, each with distinct characteristics and unique underwater habitats. Education plays a key role in the submarine tours, providing insight into the value and importance of reefs and to observe how mankind can contribute to the development of reefs and associated ecosystems.

At Waikiki, there are two tour options, a premium tour and a standard tour. The premium tour is the more popular of the two and takes place on the world's largest hi-tech passenger submarine which holds 64 passengers. The Atlantis Waikiki dive site is home to many Hawaiian fishes, coral, and turtles that passengers are able to view at 100 feet underwater. The standard tour takes place in a 48-passenger submarine and offers less viewing area and personal space per guest. Audio headset narrations are available in English, Japanese, Spanish, Chinese, and Korean and complimentary shuttle transportation from select Waikiki locations. Online rates for adults range between \$99-\$114 and children \$35-\$43. Children must be a minimum of 36" in height to ride the submarine.

To date, over 13 million customers have experienced an Atlantis Submarine Adventure.

### **Mataatua (Whakatane)** – with relevance for a 'Welcome to Country' for Sydney

The Mataatua Wharenuī meeting house was built in Whakatane in 1875 and traveled to Sydney, Melbourne, Victoria & Albert Museum and South Kensington Museum (London), before being rebuilt back in its place of origin in 2011. After more than 130 years away, Mataatua Wharenuī, New Zealand's only repatriated and most traveled Maori meeting house, stands once again as the unifying soul of the Ngati Awa (one of the Maori tribes of the Bay of Plenty) New Zealand.

The Mataatua experience provides visitors with an opportunity for intimate engagement with the people of Ngati Awa. The tribe's carvings and legends are brought to life through world-class digital technology, winning Mataatua the 2011 GOLD Nga Aho award from the New Zealand Designers Institute.

The Mataatua Maori Marae Experience is 1.5 hours in duration and involves a range of activities including: a trip to the Mataatua visitor centre, a welcome with a karakia (prayer) and the water bowl of life, a karanga (a ceremonial call welcoming visitors to Ngati Awa, a visit to Mataatua (the meeting house), a hongī (greeting and pressing of noses), story telling of Mataatua and the tribe's ancestors, a digital light show (HIKO Legends Carved in Light), and refreshments (kawakawa tea and some indigenous tasters). The base rate for the experience is \$49 per adult, \$39 per student and \$15 per child. A family pass is also available.

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