

Endorsed by the Norfolk Island Regional Council on 17 August 2016 - Resolution No. 35/16

NORFOLK ISLAND TOURISM STRATEGIC PLAN *2013-2023*

360°
of Success

A plan to guide direction, rebuild success and establish sustainability in the Norfolk Island tourism industry



Our Norfolk Island community is united in our commitment to a sustainable tourism industry that preserves and promotes our environment, culture and lifestyle. Our uniqueness, diversity and friendliness will surpass visitor expectations.

Vision Statement



360°
of Community

Executive Summary

NORFOLK ISLAND'S KEY INDUSTRY

The tourism industry on Norfolk Island started as a fledgling industry in the 1930s and supported other larger on island prime producing industries. By the 1980s the tourism industry's employment and economic impact has exceeded all other industries. More recent figures recording the value of the tourism industry on Norfolk Island highlight this:

- Tourism industry is responsible for around 41 percent of Norfolk Island gross island product
- 71 percent of all businesses on Norfolk Island are strongly associated with servicing the visitor industry
- 68 percent of private sector employment is in the visitor industry

In modern Norfolk Island, the tourism industry remains as a vital key to our future. Fundamental to that future is a partnership with all stakeholders to plan and manage the outcomes of this industry.

The Norfolk Island Tourism Strategic Plan 2013 - 2023 is a document designed to guide this partnership, formulated in consultation with the community and government, it is a key element for 360 degrees of success.

JOINING HANDS

The vision delivered in this Strategic Plan highlights what all stakeholders see as guiding principles to follow. To achieve this vision we will seek to build stronger stakeholder partnerships, develop emerging niche markets, embrace new technology and preserve what is unique to our destination.

More than ever before the industry must work together and share the load in creating a sustainable and profitable industry for future generations.

SETTING THE SCENE

From our peak visitor numbers in the early 2000s, Norfolk Island tourism has faced a steady decline. Changes in market demographics, traveller trends, with increased competition from other holiday destinations and the world financial economy have provided for an environment whereby traditional markets have not been sustainable, and efforts to react have not provided successful outcomes.

Norfolk Island is well placed to move forward into the future. Products and services which have been upgraded and developed over the past five

years are providing a platform within the destination to attract and satisfy the demands of 'today's travellers'. Within these changes is also the ability to seek new niche markets for visitors and investment.

This strategy responds to a number of challenges including areas within increased competition, airline partnership dependency, limited distribution channels, industry sector challenges, island governance, market perception, industry cohesion and statistical data collection.

ESTABLISHING LEADERSHIP

Norfolk Island's tourism industry is a highly diverse business with multiple stakeholders and a range of market segments. This Strategic Tourism Plan requires both industry ownership and industry leadership to allow for effective governance, cohesion and balanced focus on priorities for the destination and in marketing. The Norfolk Island Government Tourist Bureau Advisory Board will be reinvigorated to play this role. Now established within the Norfolk Island Tourist Bureau Act 1980 in an advisory board capacity, the Board provides an effective, connected platform to better ensure broader stakeholder input. Members will establish individual portfolios and actively engage in those areas for planning and development.

10 YEAR STRATEGY

The Strategic Plan is designed to rebuild the tourism industry framework to provide for a greater level of self reliance by working together to achieve success in five strategic themes

1. Increase visitor numbers arriving by air and cruise ships
2. Provide an environment conducive to investment
3. Seek to provide the best in our visitor experiences
4. Develop sustainability, infrastructure and capacity
5. Build employment capacity and skill within the sector

We will achieve our goals through a series of defined actions highlighting responsibilities and partnerships. These actions will be consistently measured, reviewed and communicated to all stakeholders ensuring accountability.



Executive Summary (Continued)

KEY NICHE MARKETS

Australia and New Zealand are the prime markets to produce visitors in the following niche markets:

- Food (sustainability, homegrown, seasonal)
- Sports (sport facilities, sporting events)
- Eco Tourism (flora and fauna)
- Culture (language, local customs)
- History (world heritage, the island story)
- Activities (special events, touring, wellbeing)
- Short Break Escape (relaxing getaway)
- Family Holidays (time to connect with family)
- Conference & Incentives

FOCUSED MARKETING

A focus in marketing is key to expansion and development in all markets and this strategy outlines initiatives in this area.

All stakeholders must strive to form strategic marketing partnerships and produce co-ordinated campaigns in an effort to best utilise resources.

Public relation plans and social media strategies will combine with traditional mediums of advertising to maximise exposure and build greater awareness.

We will work together to ensure the communication strategy for Norfolk Island destination branding is well understood and communicated in all marketing activity, therefore establishing destination identity and value.

New innovations in marketing and electronic media will be analysed. We will look to increase our distribution and marketing opportunities in both traditional and online channels.

ENCOURAGE INVESTMENT

Lessons learned in the past provide us with knowledge that the tourism industry must continue to move forward, adapting and changing to suit new markets and travel trends. All stakeholders need to provide for an environment of investment and innovation and encourage growth.

The business community must work to build awareness in areas of potential

investment whilst the government must seek to reduce regulatory barriers and participate in industry reform.

SETTING STANDARDS

Producing good customer service standards combined with unique experiences will enable the tourism industry sector to build value and increase profit. The mechanisms available to analyse our ability to deliver high standards to all sectors within the tourism industry on island and the value of these programs will be assessed by all stakeholders.

Industry sectors will openly advocate for the participation in tourism quality standards programs to show our visitors that ensuring a positive travel experience on Norfolk Island is our priority.

SUSTAINABILITY

Recognition that using the natural resources without destroying the ecological balance to enable their continued use has been a priority within our society since the arrival of the Pitcairn Islanders in 1856. In this strategy we will seek to build a greater understanding, encouraging a wider uptake of sustainable practices within the industry that can lead to cost efficiency, innovation, new eco tourism markets, better waste solutions and global green recognition. Norfolk Island should seek to establish itself as a beacon for sustainable practice in our region.

REMAIN UNIQUE/CONCLUSION

This document is to provide the platform for the Norfolk Island tourism industry to move forward. We will seek to retain and promote what makes us unique, protect and preserve our nature and culture, invest in and develop our product, innovate and update our marketing methods and all work together for a sustainable outcome which benefits the whole community. It is important that over the 10 year period that this is seen as a 'living document' capable of encompassing and reacting to change where required. The main strategic plan will be reviewed and reported on by the Norfolk Island Government Tourist Bureau (NIGTB) every two years in January with the Action Plans reviewed every year in March.

Glen Buffett

General Manager Norfolk Island Government Tourist Bureau



Norfolk Island is fortunate to be geographically situated between two major tourism source markets - Australia and New Zealand. Norfolk Island needs to capitalize on this advantage and increase visitation through air travel and a burgeoning cruise market.

The Norfolk Island Government recognizes tourism on Norfolk Island has declined significantly in recent years and must look to expand tourism opportunities.

Fluctuating patterns in visitor arrivals demonstrate the vulnerability of the industry, we must therefore work towards achieving a more consistent growth strategy. The Norfolk Island Government Tourist Bureau and other industry groups have mapped out long term intentions with the formulation of this Strategic Plan and I urge all stakeholders to take responsibility for its success.

During the inception of this document the Minister for Tourism at that time, Mr. Andre Nobbs stated, "We've made a commitment and we must all now assume a role in delivering and achieving our desired outcomes". This statement resonates in this version of the Strategic Plan and I wholeheartedly agree with it.

I would like to thank everyone who has contributed to the development of this Strategic Plan. It is a plan to guide direction, to rebuild success and to establish sustainability in the Norfolk Island Tourism Industry.

Lisle Snell
Chief Minister & Minister for Tourism





360°
of Diversity

Norfolk Island is unique because of its Diversity in History, Diversity in Culture, Diversity in Nature, Diversity in Activities and Diversity in Product all grounded by a simple pace of life with friendliness and honesty in the delivery

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Table of Acronyms used throughout document

Acronym	Organisation/Agency/Group
ANPS	Australian National Parks Service
ATA	NI Accommodation & Tourism Association
COA	Commonwealth of Australia
NICC	Norfolk Island Chamber of Commerce
NIG	Norfolk Island Government
NIGTB	Norfolk Island Government Tourist Bureau
NIT	Norfolk Island Tourism
NITI	Norfolk Island Tourism Industry
KAVHA	Kingston and Arthur's Vale Historic Area
TA	Tourism Australia



1. Auwas (Our) Industry Vision

Our Norfolk Island community is united in our commitment to a sustainable tourism industry that preserves and promotes our environment, culture and lifestyle. Our uniqueness, diversity and friendliness will surpass visitor expectations.

Vision Statement



2. Auwas (Our) Plan

2.1 Purpose of the Tourism Plan

The aim of this document is to provide for a whole of community plan that will:

- Establish a vision for the tourism industry of Norfolk Island, which in consultation with stakeholders outlines the values and directions most important to the community
- Provide key strategic themes to set direction and the potential platform for all Norfolk Island tourism stakeholders to provide input and actions
- Create growth in visitor demand from niche markets
- Provide implementation of investment and regulatory reform
- Guide improvement of our tourism product
- Plan the development of tourism infrastructure
- Build human resources and skill capacity
- Provide time lines for a short term (2 year) recovery strategy and long term (10 year) opportunities
- Establish effective mechanisms and reference points for the measurement of performance of the tourism industry and all stakeholders
- Be guided by stakeholder aspiration in industry yield, profitability, innovation and environmental sustainability



2. Awas (Our) Plan

2.2 The Importance of Tourism

The value of the Norfolk Island tourism industry has been defined in the ACIL Tasman Norfolk Island Economic Development Report March 2012:

"The main driver of economic growth on Norfolk Island is the tourism industry, and path dependence means that future economic development on Norfolk Island should largely concentrate on the tourism sector".

Also in this document both the value of the industry, and the potential for growth, is highlighted:

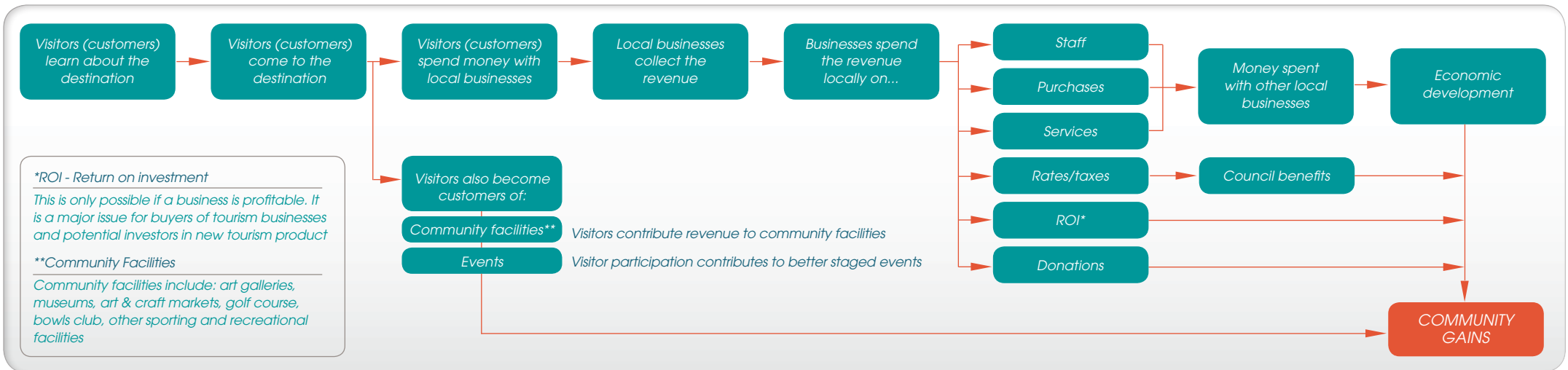
"The Norfolk Island economy is highly dependent on tourism. ...

Tourism is not a separately identified industry in the Input Output database, but using a previously developed tourism spend methodology, and actual tourism stay information, it is possible to derive a reasonably accurate measure of the extent to which

tourism is a driver of economic activity on Norfolk Island. Based on the expected distribution and value of tourist spending, tourism is responsible for around 41 percent of Norfolk Island Gross Island Product.

Consistent with the high share of output attributable to tourism, there are a large number of accommodation businesses, restaurants, and cafes on Norfolk Island that cater for tourists. Although the data is now a little dated, the Australian Bureau of Statistics reported that in 2004/05, business that were strongly associated with servicing tourists accounted for 71 percent of all businesses on Norfolk Island, and 68 percent of private sector employment.

More recent business data is not available, however, it is expected that the relative importance of tourism related businesses has not changed much over the past few years. This assertion is based on analysis of employment share data contained in the various Norfolk Island Census reports. In the 2001 Census 17.8 percent of the workforce was employed in the Restaurants, hotels, accommodation and clubs industry, whilst in the 2006 Census the corresponding figure was 17.4 percent. In the 2011 Census the classification title changed slightly to Hotels, accommodation, pubs, and restaurants, and 17.8 percent of the workforce was employed in this industry".



Community gains chart provided by Economic Development Australia



2. Auwas (Our) Plan

2.3 Guiding Principles

On 29 February 2012 the Minister for Tourism hosted a public forum to discuss and develop - A 10 year Vision Statement for the Norfolk Island tourism industry designed to enhance the industry value, increase the destination profile and create community ownership for the future of tourism on Norfolk Island.

Following this forum, comments were sought from the NIGTB Advisory Board and from the public. A final review of those comments was completed in the Strategic Plan public consultation meeting on 17 August 2012. A number of guiding principles were identified in this consultation process for the tourism industry to follow.

These principles are summarised as follows:

- The tourism sector should continue to be the major contributor to Norfolk Island's economy providing jobs and benefits for all residents through all seasons
- Norfolk Island should actively explore new growth opportunities for tourism within our region
- Norfolk Island should reach tourism growth by focused efforts on those products and markets where we have seen best results as well as establishing new key niche markets
- Norfolk Island should produce marketing plans and priorities based on definitive research and utilising information within our region
- Norfolk Island should be business friendly. Collaboration and partnerships with all stakeholders will enhance our tourism industry
- Norfolk Island's tourism industry should provide leadership for community and industry in planning and development



2. Awas (Our) Plan

2.4 Formulation Process

In 2007 Norfolk Island Tourism published the Five Year Tourism Strategy 2007/8-2011/12. By late 2011 it was determined that a number of key recommendations of that Tourism Strategy had either not progressed, or were no longer relevant. The most significant of these has been the lack of success in increasing visitor arrivals, uniting tourism stakeholders and attracting the target baby boomer market.

In 2011 the Tourism Minister sought a review of the Five Year Tourism Strategy and to develop a new Strategic Plan. In doing so he has attempted to address one of the causes of the previous strategy not progressing, which is the commitment of all stakeholders in the industry.

The then Tourism Minister commented -

"Within that new strategy will be areas that are specifically developed to recognise some of the issues in the retail sector, in the accommodation sector, in the touring sector, in the broad tourism areas for Norfolk Island. And those areas of the strategy will be developed in conjunction with, for example, for the ATA and the Chamber of Commerce, so they have ownership of it, and they are then committed to the changes and they then become realistic changes that we all work towards". (Hansard, 6 July 2011)

The review of the Tourism Strategy was completed by the NIGTB in January 2012. It was determined that a new Strategic Plan which

offers short term recovery, as well as longer term direction, was required for tourism on Norfolk Island. In support of the Minister's comments it was also determined that any further strategic plans would require a greater commitment from all stakeholders in the tourism industry of Norfolk Island to achieve success.

The need for more general substantial planning was also identified in the ACIG Norfolk Island Public Service Review 21 November 2011. The review found little evidence of a clear vision or sustainable long term plan for the future of Norfolk Island.

"In our discussions with MLAs, public servants and the community, most people focused on the past, believing their situation to be better in the past than at present, and blamed the current situation on the economic downturn.

...

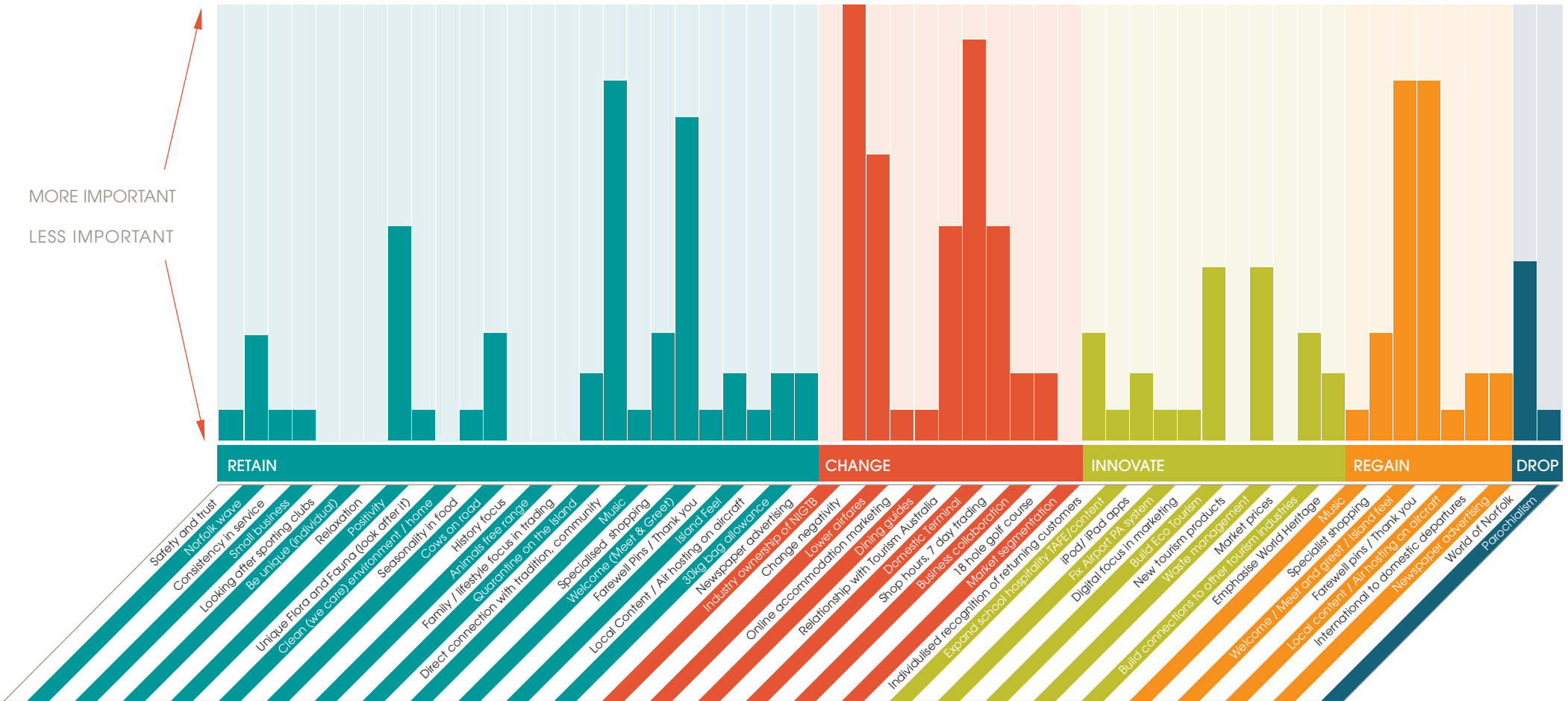
A community vision and long term plan for the future (with a 20 to 30 year horizon), underpinned by a sound strategic financial plan, is essential to help the community develop a realistic understanding of the situation and what is needed to improve it. This in turn will increase ownership of any change proposals and mitigate resistance to them".

This plan seeks to progress from the 2007-2012 Tourism Strategy by building on the relevant research and successful outcomes, whilst also establishing a commitment from all industry stakeholders to rebuild the Norfolk Island tourism industry into a strong, sustainable, resilient industry that can maintain a substantial economic contribution into the future.



2. Auwas (Our) Plan

2.4 Formulation Process



This chart represents the responses given by attendees at the stakeholder consultation meeting, August 2012

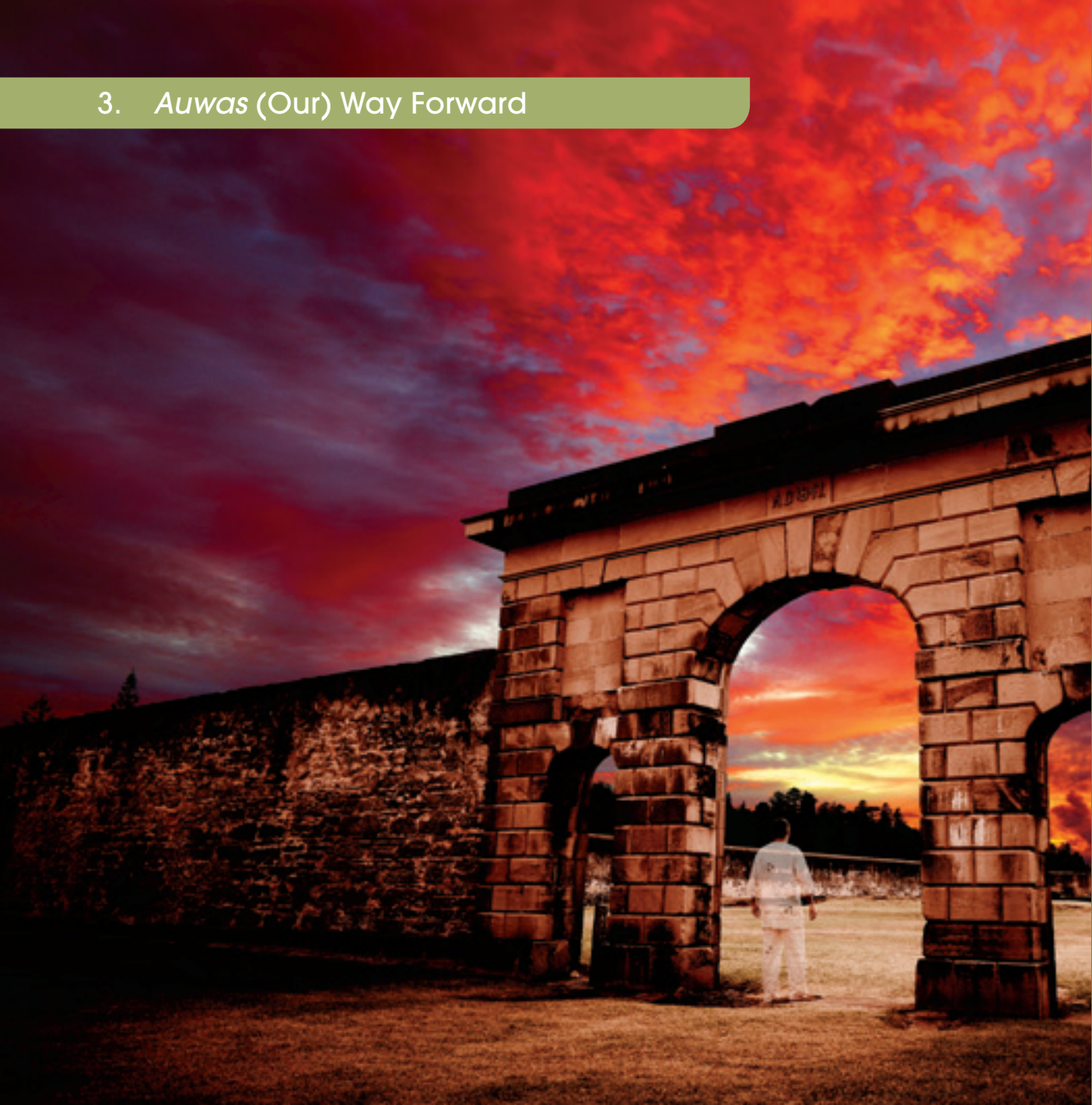


Establishing a commitment from all industry stakeholders to rebuild the Norfolk Island tourism industry into a strong, sustainable, resilient industry that can maintain a substantial economic contribution into the future.

360°
of Process

Norfolk

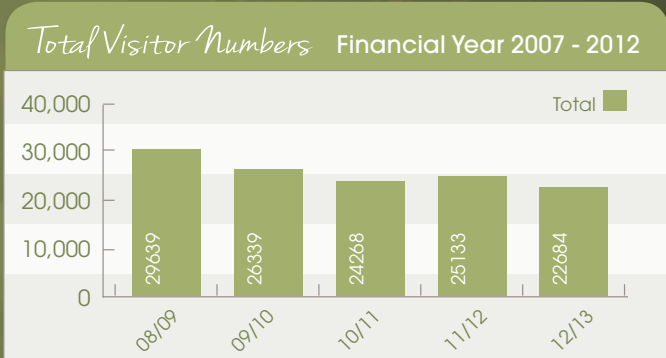
3. Auwas (Our) Way Forward



3.1 Challenges

Norfolk Island's tourism industry has suffered a number of significant changes over the past 15 year period. Growth rates in the late 1990s have proven to be unsustainable and Norfolk Island has experienced a steady decline in visitor numbers since 2005. Various world events such as the global financial crisis combined with a continued decline in the traditional 'pre-war' generation travellers (First identified in - *A time of generational change: will Norfolk Island's tourism industry be ready?* Prideaux, Bruce 2004) have contributed to this decline. Additionally, a lack of finances and also a lack of capacity to realise established initiatives to raise visitor numbers. The 2008 Norfolk Air contract, the World of Norfolk brand campaign and the Marketing partnership program unfortunately produced less than successful results.

Auwas (Our) Way Forward



3. Auwas (Our) Way Forward

3.1 Challenges (continued)

Increased Competition

Norfolk Island currently only receives regular visitors by Air Travel. The domestic and international markets from New Zealand and Australia, in which Norfolk Island competes, have grown by way of greater consumer access to low cost carriers, increased demand in the cruise ship industry, a wider range of choices provided by regional airlines and affordability of international travel as a result of a strong Australian dollar.

Airline Partnerships

After 15 years of independent airlines servicing Norfolk Island from Australia, which resulted in various contractors, availability, schedules, pricing and distribution, the Commonwealth of Australia has underwritten a service contract currently operated by Air New Zealand.

From New Zealand, flights are currently restricted to Sundays which does not allow for competitive advertising based on shorter stays.

The overall available seats on scheduled services per year can be calculated as shown to the right.

Available Annual Airline Seats as at September 2013

Air New Zealand - Aircraft A320			
Seats P/Plane ex Australia	152		
Seats P/Plane ex NZ	162		
	P/Week	P/Year	Est. Visitor Capacity*
Ex Sydney	304	15808	11556*
Ex Brisbane	304	15808	11556*
Ex Auckland	162	8424	6158*
Total	770	40040	27548*

* Based on 80% avg. load factor less 14% local traffic



3. Auwas (Our) Way Forward

3.1 Challenges (continued)

Distribution Channels

Changes in Australian airline providers and Norfolk Island tourism policy has led to a wide range of distribution channels which include the traditional travel agent distribution, group travel providers and online booking agencies. Currently in Australia there is a high reliance on niche wholesale partners who have a reduced accessibility to travel agent groups and a reduced capacity to provide for larger consumer advertising campaigns. In New Zealand there is a reliance on larger wholesale partners and airline sale campaigns with a lesser ability to provide for consistent consumer marketing.

Currently both markets are substantially supported by the Norfolk Island Tourism budget for the provision of destination awareness, destination demand and some tactical sales/direct marketing contributions.

On Island Suppliers

There have been significant changes in some of the visitor product on Norfolk Island. There are some industry sectors which have not been able to move to address the demands of today's traveller. Overall specific reports such as SHOPPING ON NORFOLK ISLAND: 2008 SURVEY Bruce Prideaux have not been widely accepted by the relevant sectors or the key bodies such as the Chamber of Commerce. Similarly ideas such as those offered in the StollzNow How to connect with Baby Boomers paper, the suggestions to make Norfolk Island more interesting to the Baby Boomer market have not been promoted and pursued.

A reduction of visitor numbers coupled with outdated legislation, changes in taxation and other market influences have lowered the ability to stimulate investment in the industry from both on-island and off-island sources.

The Market

Norfolk Island's tourism volume in the late 90's and early 2000's was driven by large travel groups primarily aged 65 and over. This market travelled seasonally, pre-paid premium prices and cost very little in overall advertising contributions. This market still exists on Norfolk Island however a lack of

focus, generational changes, new cruise markets, cheaper domestic options all have resulted in the decline of this market. There is evidence that Norfolk Island is now attracting a new generation of traveller however this has not replaced the group markets and is disproportionate to regional travel figures.

Governance

The Norfolk Island Economic Development Report, March 2012 outlines – *"The current population of Norfolk Island is approximately 1,800, and tourism services are the main private sector economic activity. Tourism activity has, however, declined over recent years; and this has had a substantial negative impact on local incomes, and also resulted in a serious deterioration in the financial position of the Norfolk Island Government"*. Without significant progression in the Norfolk Island Road Map developed between the Norfolk Island Government and the Commonwealth of Australia this situation will worsen.

Market Perception

Highlighted by the StollzNow, How to connect with the Baby Boomers research, market awareness of Norfolk Island as a destination is low and this is coupled with a market perception, within the emerging Baby Boomer markets, of 'boring', 'time lock' and 'penal colony'. Additionally, feedback from industry representatives suggest Norfolk Island is still regarded as an 'older persons' destination without a clear signature image or established value.

Industry Cohesion

There is no evidence to suggest that any initiatives to establish better industry cooperation have succeeded in providing for a less fragmented industry. There are currently only two industry segments (accommodation and retail) who have some representation, however there seems to be internal fragmentation and collective input is still difficult to achieve. It is very difficult in the current environment for the government bodies to communicate and receive feedback from all relevant and active stakeholders.



3. Auwas (Our) Way Forward



3.1 Challenges (continued)

Statistical Data

Up until June 2011 a wide range of statistical data in relation to arriving passengers was available through the Customs & Immigration department. This data was available in pre-formatted reports which gave access to non specific details such as port of departure, age demographics, occupation, gender, traveller type and accommodation. Since July 2011 changes to the Customs & Immigration department database has resulted in this specific information not being available. This limits the analysis of destination profile to identifiable demographics.

The World of Norfolk

The review of the World of Norfolk destination brand carried out in December 2011 identified the following issues with the associated brand promises and brand campaign:

- There is an overall lack of understanding on island about how the World of Norfolk brand was being delivered to the consumer which has led to a negativity toward the campaign messages
- There is clear communication breakdown between the World of Norfolk brand and the message being delivered to the consumer in campaigns
- The initial campaign line of 'Welcome Back to Earth' did not resonate with the industry and was not used in the context of an overall unique selling promise (USP) it was instead used as a back up message to the World of Norfolk in text
- The messages identified within the advertising (4 pillars) of History, Culture, Natural Beauty and Lifestyle are complicated and often inconsistent with what products are being delivered



3. Auwas (Our) Way Forward



3.2 Opportunities

New Niche Markets

The niche market segments that have been identified through market research and Norfolk Island community feedback, that should be assessed, prioritised and promoted include:

- Food (sustainability, homegrown, seasonal)
- Sports (sport facilities, sporting events)
- Eco Tourism (Flora and Fauna)
- Culture (Language, local customs)
- History (World Heritage, the island story)
- Activities (Special events, touring, wellbeing)

Niche "Experience Seekers" travel types to be promoted to and developed can include:

- Short Break Escape (relaxing getaway)
- Luxury Packages (pamper escapes)
- Conference and Incentives Market (a new destination)
- Family Holidays (Time to connect with family)
- Self-discovery Holidays (seven days do it yourself)
- Group Holidays (fully packaged group touring)
- International travellers (Island stopovers, add-ons)

Marketing and communication methods must be developed and individually tailored to each market based on potential and priority.



3. Auwas (Our) Way Forward

3.2 Opportunities (continued)

Regional Tourism Australia

Regional tourism does not indicate large scale decline - Tourism Australia statistics show in July 2012 there were 108,000 visitors from New Zealand, bringing the total for the seven months to July to 657,800 an increase of 2.1 per cent relative to the same period of the previous year.

During the year ended 30 June 2012, there were 5,536,996 total visitors to Australia aged 15 years and over. This was a slight increase of 1% from the year ended 30 June 2011. Of these visitors, the relevant holiday and VFR traffic can be shown as follows:

Holiday Visitors	
Share	Of all international visitors to Australia, 44% stated 'holiday' as their main purpose of visit
Expenditure	The average trip expenditure of holiday visitors in Australia was \$2,393, with the largest component being food, drink and accommodation (\$1,140). Their average expenditure per night was \$92
Nights	Holiday visitors spent a total of 64 million nights in Australia, with 25% spent in the home of a friend or relative; 28% spent in a rented house, apartment, flat or unit; and 17% spent in a hotel, resort, motel or motor inn
Return visits	Of all holiday visitors, 52% had visited Australia before
Tours	Inclusive package travellers accounted for 28% of all holiday visitors, while those arriving on a group tour accounted for 16%
States	Of all holiday visitors, 56% visited New South Wales, 46% visited Queensland and 34% visited Victoria
Duration of stay	The average duration of stay in Australia for holiday visitors was 26 nights

Visiting Friends & Relatives (VFR) Visitors	
Share	International visitors with a main purpose of VFR accounted for 25% of all international visitors
Expenditure	The average trip expenditure in Australia by VFR visitors was \$1,632, with the largest component being food, drink and accommodation (\$677). Their average expenditure per night was \$59
Nights	These visitors spent a total of 38 million nights in Australia and spent 82% of their nights in the home of a friend or relative
Return visits	Of all VFR visitors, 75% had been to Australia before
States	Of all VFR visitors, 46% visited New South Wales, 30% visited Victoria and 28% visited Queensland
Duration of stay	The average duration of stay in Australia for VFR visitors was 28 nights

Information from International Visitors in Australia, September 2012 Quarterly Results of the International Visitor Survey



3. Auwas (Our) Way Forward



3.2 Opportunities (continued)

Product

Norfolk Island offers a range of products which would cater to the previously outlined markets. Some of these products tap into the preferences of today's traveller including:

- Personalised tour options, iPod tours
- Special events
- Sustainability, homegrown, seasonal food
- Niche market tours
- Wireless internet hot spots,
- Wellbeing products
- Updated accommodation
- Relevant retail outlets
- Culture, history & heritage

Accommodation

Current information on accommodation providers is available, and there are 66 properties offering accommodation on Norfolk Island. In total there are 1,649 accommodation beds available on Norfolk Island. The distribution of accommodation on Norfolk Island is as follows:

- Five hotels with a star rating of 2.5 to 3.5
- 60 self-catering units, cottages or houses with a star rating of 2.0 to 5.0
- One guest lodge with a star rating of 3.5

Should it be required there is currently enough accommodation to provide for a significant increase in visitor arrivals.



3. Auwas (Our) Way Forward

3.2 Opportunities (continued)

Our Target Market

Current research such as the Tourism Australia’s Domestic Study, 2011 Key Insights for Domestic Travel indicate that there are current trends in domestic tourism, which will enable Norfolk Island to connect as a relevant experience within the Baby Boomer market.

- Australians are currently seeking reassurance and certainty
- Travel is seen as one of the important enriching life experiences to which status is now attached
- Where people used to buy ‘things’, they now buy ‘experiences’.
- Amidst uncertainty, people seek safe and familiar things
- The “trading up, trading down” phenomenon is increasingly reflected in purchase decisions – including travel
- The general climate of uncertainty leaves people seeking safe and familiar things
- Everything old is new again
- People are actively trying to save money
- Australians are also spending more cautiously, spending less on large scale indulgences, in favour of smaller treats, looking for deals and value for money
- The heartland of Australian domestic travel continues to be about reconnection. When we look back at what Australians describing as an “ideal” Australian holiday as being familiar, nostalgic, a family holiday, connecting and unwinding, relaxation and the beach, experiencing the known and the familiar, Australian holidays should be built around the central idea of reconnection

Also outlined in the StollzNow, How to connect with the Baby Boomers research it is recorded that Baby Boomers “who have been to Norfolk Island are very enthusiastic about the beautiful scenery and abundance of activities”. This research suggested that “Norfolk Island is an untapped destination for people in this demographic”.

The most identifiable group within this market segment which Norfolk Island is most likely to appeal to is the group termed the “Experience Seeker”.

While the diversity within the Norfolk Island experiences will appeal to a range of visitors, the focus of the Norfolk Island Tourism Strategic Plan is to identify and develop experiences that are suited to the needs of a target market. Target Markets could include those as identified as the “Experience Seeker” in Tourism Australia’s marketing experience factsheet.

“Experience Seekers”: (www.tourism.australia.com)

- Are experienced international travellers who see travel as an important part of their lifestyle; Investigate holiday options thoroughly and as such are knowledgeable consumers
- Seek out and enjoy authentic personal experiences they can talk about, involve themselves in holiday activities
- Are sociable and enjoy engaging with the locals, environment and culture
- Are somewhat adventurous and enjoy a variety of experiences. They do not enjoy being seen as tourists
- Place high importance on value and hence critically balance benefits with costs
- Place high value on contrasting experiences (ie. different from their everyday lives).

They typically:

- Spend more and come from households that have higher than average household income, are tertiary educated, are open-minded and have an interest in world affairs
- Are selective about their media consumption
- Are opinion leaders within their peer and social groups
- Are not characterised by nationality, preferred holiday style/mode or age
- Are substantial consumers of nontraditional and mainstream media and higher than usual consumers of cable television, cinema, international news and current affairs and the internet
- Understand how brands work and operate and expect messages to be succinct, focused on their motivations and provide a compelling message



3. Auwas (Our) Way Forward

3.2 Opportunities (continued)

Cruising

The cruise industry offers Norfolk Island a significant opportunity in industry diversification, investment as well as reducing sole reliance on Air travel

As outlined in the ACIL Tasman Norfolk Island Economic Development Report:

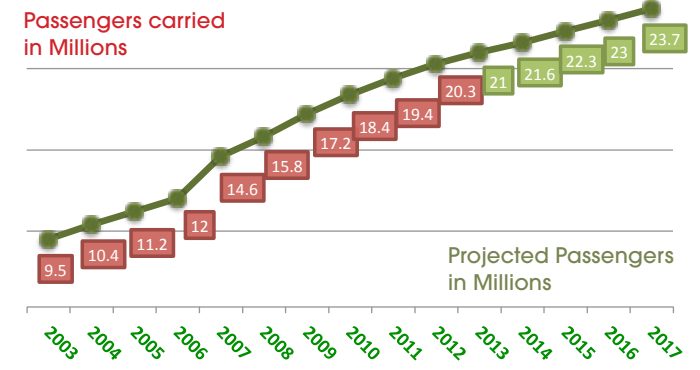
“Norfolk Island is well situated to serve as the first stop on Pacific Island cruises originating from both New Zealand and the East Coast of Australia.”

For this reason, Carnival Cruise Lines, the largest cruise operator in the region, have indicated that they would like to schedule Norfolk Island as a regular cruise stop destination.

The cruise industry is well placed to be implemented with appropriate investment.

A progression for this market would need to include assessments, infrastructure development and potentially private and public investment.

Growth of Worldwide Cruising Passengers



Source: Cruise Market Watch



*The Norfolk Island
Government and industry
must work together to
implement recommended
regulatory reforms, reduce
investment barriers and
promote investment to all
potential stakeholders.*

360°
of Direction

4. Auwas (Our) Strategic Themes

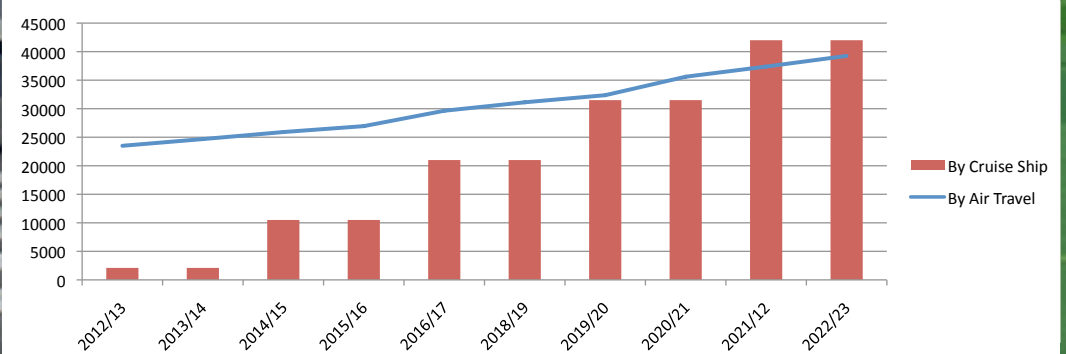
4.1 Increase Visitor Numbers Arriving by Air & Cruise Ships

To re-build tourism back to desired levels, and provide sustainable growth for the future, Norfolk Island needs to establish a more balanced portfolio of markets whilst ensuring transport capacity and infrastructure is developed in line with that growth.

Consumer understanding, distribution, marketing campaigns, and appropriate product need to provide for traditional markets whilst at the same time new Niche travel markets should be assessed, prioritised and developed in line with budgets, resources, individual expectations and demands.

Norfolk Island offers a range of niche, unique marketing opportunities to the existing visitor arriving by air which can be developed to build stakeholder yield and industry resilience. At the same time being geographically close to Australia and New Zealand, offering point of difference in experience from other Pacific destinations, provides Norfolk Island a unique opportunity to develop the Cruise market as a way to provide for industry investment and diversity.

Potential Increases in Tourism



4. Auwas (Our) Strategic Themes

4.2 Provide an Environment Conducive to Investment

Norfolk Island tourism investment is essential to meet the expectations of new markets. Some regulation is necessary to protect consumers, employees and competition, however too much regulation creates barriers preventing realisation of full economic potential. This need for reform on Norfolk Island is outlined in the Norfolk Island Economic Development Report, March 2012.

The Norfolk Island Government and industry must work together to implement recommended regulatory reforms, reduce investment barriers and promote investment to all potential stakeholders. All Stakeholders must contribute to building an environment that enables tourism businesses to thrive and prosper.



4. Auwas (Our) Strategic Themes



4.3 Seek to Provide the Best in Our Visitor Experiences

Tourism is the predominant island industry and should be recognised with all residents and businesses on island committing to a 'whole of community' approach to the quality and value of this industry.

Norfolk Island possesses a wide range of product in services, accommodation, retail, touring and food sectors and all tourism operators can increase visitor contribution to themselves and the overall economy by providing high quality, value for money products and services in the markets they provide for.

Our tourism industry is driven by small and medium sized enterprises which ensure a diverse range of visitor experiences and with capacity development in business planning, corporate responsibility and continuous improvement will enhance the value for individuals and the community.

4. Auwas (Our) Strategic Themes



4.4 Develop Sustainability, Infrastructure and Capacity

To ensure Norfolk Island attracts a growing share of the Australian and New Zealand outbound tourism market, all stakeholders will need to work to meet the infrastructure and capacity demands of the market whilst seeking to build on sustainable choices which provide good outcomes in cost effectiveness, waste management, water usage and eco tourism opportunities.

Some key areas for this work include:

- Telecommunications infrastructure, internet and mobile services, should be progressed to allow for the necessary digital capabilities required in marketing and distribution as well as providing services capable of satisfying most visitor market demands.
- Airline continuity and capacity from major regional ports should be focused on sustainable future growth in partnership with commercial providers.
- Port facilities, to encourage cruise ships and assist with cargo shipping, require public and private investment focused on good planning and sustainable outcomes.
- Town Centre beautification and road improvement to improve visitor experience requires planning and input from all stakeholders.
- The World Heritage area in Kingston could provide for a greater visitor attraction potential than has been realised with improved governance, development and interaction within this site.
- The Norfolk Island National Park should be seen as essential to the visitor experience and seek to build harmony between this access and environment preservation.

4. Auwas (Our) Strategic Themes



4.5 Build Employment Capacity and Skill within the Sector

A strategic approach by all Norfolk Island tourism stakeholders to ensure future planning for capacity and skill development within all sectors is critical to meeting the marketing demands and high service levels for growth in the value of the tourism industry.

Government and business should work together to provide the best opportunities for personal and business development, encouraging employment and investment opportunities to achieve growth in population and visitor numbers.

Along with capacity and skill, attitudes and behaviours by the whole community should be encouraged to reflect the importance of the industry and the values of the community.

Areas where this development is required include business planning, digital marketing, sustainability principles, cultural recognition, heritage connections, customer service, hospitality service and product delivery.

Regional benchmarking should continue to play a major role in development with the promotion and facilitation of recognised programs such as TQUAL whilst the internal Norfolk Island Tourism Awards should be encouraged to highlight success.





360°
of Service

As a holiday destination customer service is critical to the visitor experience. As well as meeting visitor expectations Tourism as the main industry should provide the best opportunity for personal development and employment opportunities

5 Measuring & Reviewing *Auwas* (Our) Success

5 Measuring & Reviewing

It is very important that this Strategic Plan goes through a process of review on a regular basis to ensure relevance and accountability.

A review of all strategic themes, guiding principles, challenges and opportunities will be done every second year in January. The action plans, deliverables and measurements will be reviewed on an annual basis.

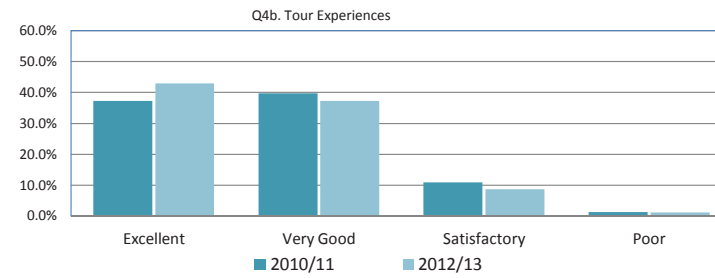
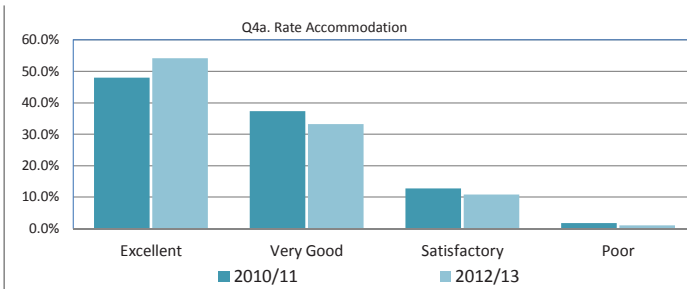
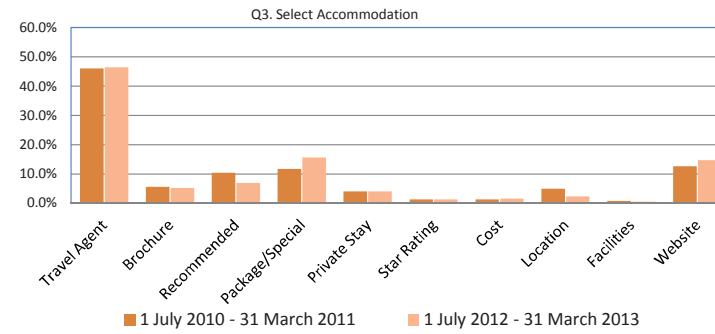
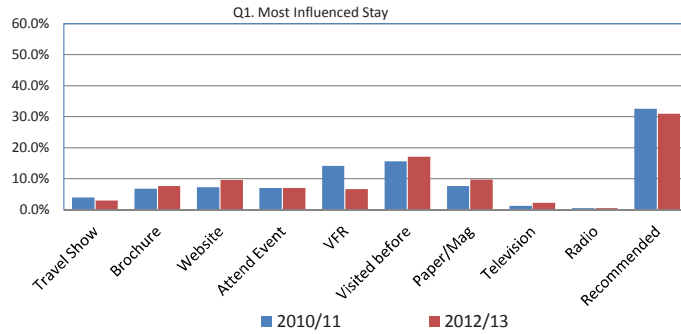
Key to the review process is the need to ensure all available measurements are utilised and additional measurements are developed so the best possible information can be collected, collated and accessed. The NIGTB will conduct these reviews and reports.

Current Available Measurements

- Immigration tourism statistics
- NIT Visitor survey report
- Industry publications and collateral
- Advisory Board feedback
- Norfolk Island Tourism advertising budget
- Tourism statistics
- Media watch reports
- Sales return on investment reports
- NIT Facebook, Twitter, Pinterest, Youtube accounts
- NIT Website Google Analytics
- Industry newsletters
- NIGTB marketing collateral
- Image and video database
- Visitor Information Centre complaint forms
- Task group minutes and reports
- Business and Companies registration
- Advisory Board minutes and Legislative Assembly Hansard
- Commonwealth and Norfolk Island governments annual budget allocations
- Norfolk Island census



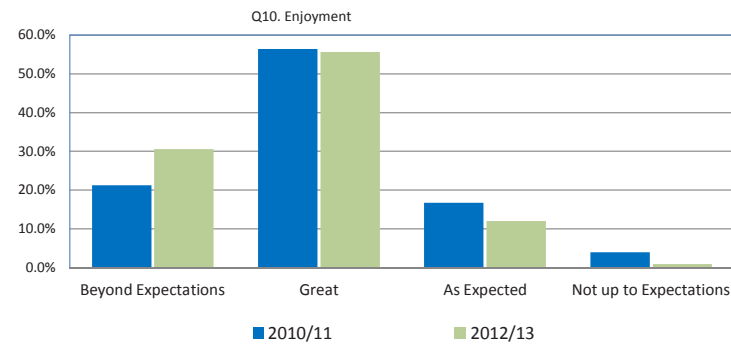
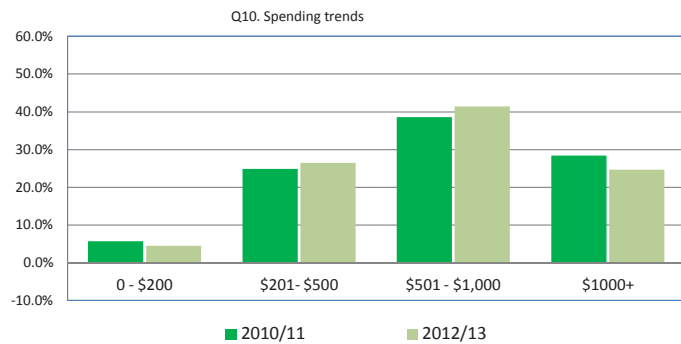
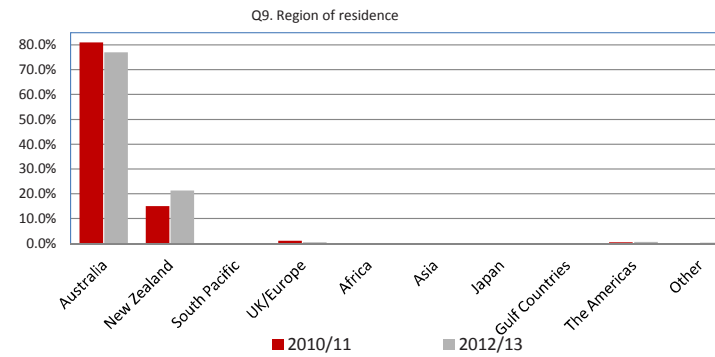
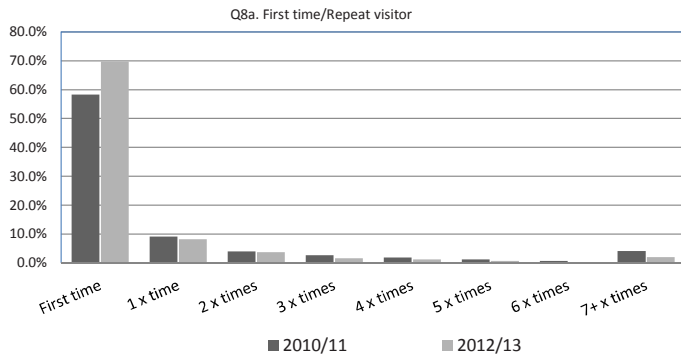
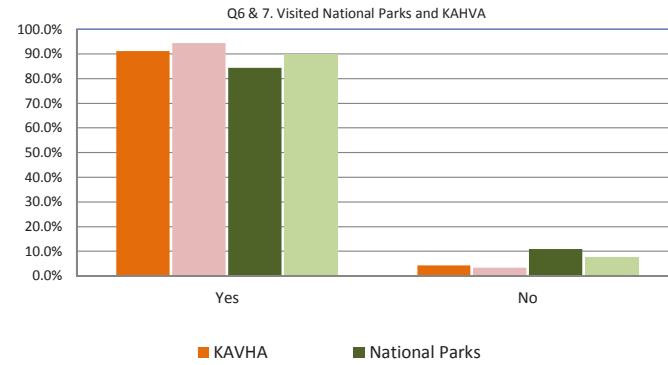
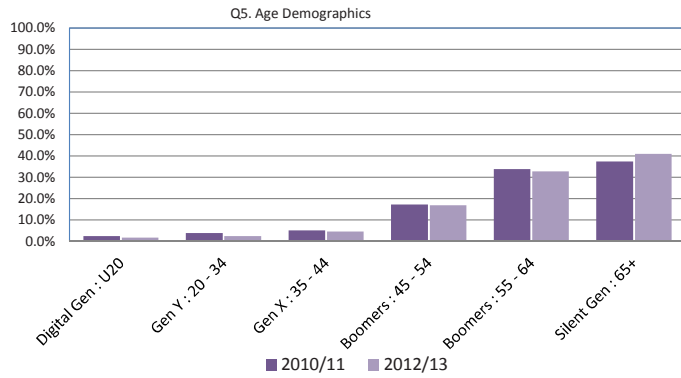
5 Measuring & Reviewing Auwas (Our) Success



Above are examples of statistics from the NIGTB Visitor survey. This is one tool which will be utilised to provide measurement



5 Measuring & Reviewing Aawas (Our) Success



Above are examples of statistics from the NIGTB Visitor survey. This is one tool which will be utilised to provide measurement



6. Auwas (Our) Industry Commitment

Commitment


The future of the Norfolk Island tourism industry is dependent on the commitment of all stakeholders to the guiding principles, the themes and actions within this Strategic Plan.

The following signatories highlight the Norfolk Island Government's commitment to the tourism industry through this Strategic Plan:

Chief Minister & Minister for Tourism
Mr Lisle Snell

Signed: 
16/10/13

Chairman of the NIGTB Advisory Board
Mr Mike Perkins

Signed: 
16/10/13

General Manager, NIGTB
Mr Glen Buffett

Signed: 
16/10/2013





7 Goals, Actions & Responsibility

To ensure all stakeholders understand how they can contribute to the success of the Strategic Plan, an overview of organisations, departments and bodies that play major roles, has been developed. This overview is encompassed within this section of the Strategic Plan.

Also within this section is an overview of the NIGTB action plans, deliverables and measurements for 2013 to 2015. The NIGTB will utilise the document to formulate annual business and marketing plans and provide accountability and scheduling for this period.

It is essential that throughout the life of the Strategic Plan all key industry bodies (ie. ANPS, ATA, NICC, KAHVA, NIA) engage with the strategy by providing their own action plans, deliverables and measurements, particularly where they are identified as having high levels of responsibility.

This will enable all stakeholders within the Industry to better understand responsibilities, ensure robust review and enable benchmarking within the scheduled periods.



7 Overview of the NIGTB Action Plans, Deliverables and Measurement for 2013-2015

	Objectives	Actions	Key Deliverables	Measurement
INCREASE VISITOR NUMBERS	Increase destination awareness, breakdown negative market perceptions, provide for distribution diversity & support, build market portfolios, maximise Airline capacity and address seasonality	Continue to build close, mutually beneficial commercial relationships with Air New Zealand	Continuity and collaboration with Air New Zealand in all marketing ventures and the maximisation of seasonal capacity	Increase in the overall load factors on available airline seats
		The development and implementation of destination and tactical marketing campaigns for New Zealand and Australia	Proportionate spending on destination branding and sales tactical marketing	Defined line items in Australian and New Zealand marketing budgets
		Continued implementation and evaluation of the 360 degree brand campaign in Australia and New Zealand	Branding elements utilised where possible	Increase in branding on all co-operative funded advertising ventures, PR opportunities and industry promotions
		Promote diversity and ROI through traditional and online distribution channels in all marketing plans	Access to wider travel agent distribution channels and market utilisation of Online Travel Agents (OTAs)	An increase in available Travel Agent distribution through wholesale partnerships and an increase in the available product through OTAs
		Continuously improve the net number, quality and variety of information and promotional collateral	Revision of all electronic and printed information sources as well as video and imagery libraries	An increase in the available electronic information, video and imagery
		Address low season growth opportunities through industry partnerships in promotions and product	Implementation of seasonal specific marketing plans	Higher than average increase in the number of visitors during the months of January, June, July and August
		Continued development of the NIT digital marketing capabilities	Ongoing development of the www.norfolkisland.com.au website	The increase of experiential travel information, industry resources, supplier information, visitor engagement and search engine optimisation
		Continued implementation of the NIGTB Social Media Strategy, Australian and New Zealand marketing, Public Relations and operational plans	Marketing through social media, consistent press sales advertising, consistent Media visitations	An increase in social media platforms for NIT, sales and tactical advertising joint ventures, off sale advertising and media coverage
		Introduce, facilitate and promote new Niche markets	Progression in the development of the short break, family, school group, gay, luxury and MICE markets	Increase in bookings from new Niche markets
		Seek to leverage Norfolk Island's status as an External Territory of Australia to gain access to Tourism Australia marketing facilities	Access to the Australian Tourism Data Warehouse website under External Territory category	Increase in available TQUAL Norfolk Island product on the ATDW website
	Establish industry communications between all industry stakeholders	Regular industry communications over a variety of mediums	Fortnightly newspaper updates, monthly radio updates, monthly product updates, six weekly EDMs, quarterly Industry Newsletters	
PROMOTE INVESTMENT	Contribute to building an environment that enables tourism businesses to thrive and prosper	Provide feedback and opinion on regulatory reform issues to government and industry	The establishment of a working group within the Advisory Board to provide regular updates to government on barriers to investment and industry growth	Advisory Board working group report
IMPROVE VISITOR EXPERIENCE	Develop the number, diversity and quality of Norfolk Island's tourism product	Identify and assist in potential growth areas for Niche Market development	The establishment of a working group within the Advisory Board to evaluate and report on existing market potential, and new market opportunities.	Advisory Board working group report
		Promote participation in TQUAL accreditation and facilitate the operation of the Norfolk Island Tourism award program.	Continued Industry support of the AAA Accommodation Grading System. Re-commencement by the NIGTB Advisory Board of the Norfolk Island Tourism Awards	Industry participation in the TQUAL accredited programs and the Norfolk Island Tourism Awards
		Promote the use of Norfolk Island culture in tourism product development	The establishment of a working group within the Advisory Board to evaluate and report on Tourism opportunities as identified in the Norfolk Island cultural strategic plan	Advisory Board working group report
DEVELOP INFRASTRUCTURE AND CAPACITY	Contribute to the development of Industry infrastructure, growth capacity and sustainability to enhance visitor experience and industry viability	Identify priorities and funding opportunities	The establishment of a working group within the Advisory Board to evaluate and report on infrastructure and capacity needs, commonwealth grants, funding partnerships and public, private investment opportunities	Advisory Board working group report
CREATE EMPLOYMENT DEVELOP SKILL	Contribute to the development of industry education and skill development for better visitor experience and employment outcomes	Establish government leadership by improving internal Human Resource management and accountability processes.	Achieve recognition of best practice by the Australian National Auditors Office	Norfolk Island Government Tourist Bureau Annual Report
		Engage in stakeholder partnerships, and build internal capacity, to delivery tourism skills development training and education programs	Industry training in digital marketing strategy	On island training delivery in digital marketing
		Identify priorities and funding opportunities	The establishment of a working group within the Advisory Board to evaluate and report on employment and skill needs, commonwealth grants, funding partnerships and public, private investment opportunities	Advisory Board working group report





360°
of Goals

Within this Strategic Plan we outline a series of goals and performance indicators that stakeholders can utilise within their own plans to provide direction and ongoing analysis

Acknowledgements

We thank the following for the contributions to the development of this Strategic Plan.

- Economic Development Australia, Norfolk Island working group August 2012
- Peter Kenyon, Bank of Ideas
- Norfolk Island Government
- Norfolk Island Community
- Norfolk Island Government Tourist Bureau Advisory Board

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There's more to
NORFOLK ISLAND 



NORFOLK ISLAND TOURISM STRATEGIC PLAN 2013 - 2023

A plan to guide direction, rebuild success and establish sustainability in the Norfolk Island Tourism industry

Prepared by:

Norfolk Island Tourism

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There's more to
NORFOLK ISLAND 