

BUILDING ON SYDNEY AND NSW'S CULTURAL CAPITAL

Submission in response to NSW Government's discussion paper,
Framing the Future: Developing an Arts and Cultural Policy for NSW

DECEMBER 2013



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TTF uses its experience and networks to influence public policy outcomes and business practices, and to assist the delivery of major tourism, aviation and transport-related infrastructure projects. Our members' interests include tourism, accommodation, major events, aviation, land and maritime transport, investment, property development, finance, retail, hospitality and education.

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Introduction

LINKING THE VISITOR ECONOMY AND CREATIVE SECTOR

Sydney and New South Wales's unique cultural offering is a key demand driver of travel to the city and state. The tourism industry recognises the value of the cultural sector, incorporating imagery of cultural icons such as the Sydney Opera House and cultural events such Vivid Festival, Handa Opera on the Harbour, and the Sydney International Art Series into its tourism marketing programs and the state events calendar.

In 2012-13, NSW hosted 9.9 million international and domestic travellers who participated in cultural activities including attending performing arts and festivals, visiting museums and galleries, and experiencing indigenous art and culture¹. This represented 16 per cent of domestic overnight travellers and 59 per cent of international visitors to the state, making the cultural sector particularly important to NSW's tourism exports. These visitors tend to generate higher yield than average, staying longer and spending more - supporting the state's ambitious target of doubling overnight visitor expenditure by 2020².

While these cultural visitors support the broader visitor economy, spending money on transport, accommodation and entertainment, they also support cultural institutions, providing an additional source of revenue which contributes to their ongoing financial viability and sustainability. An opportunity exists to leverage the value of the tourism industry to increase the sustainability of cultural institutions. These institutions need to be equipped to cater for visitors, particularly those from international markets. It is also important that surrounding cultural precincts have the wayfinding infrastructure and transport connections in place to ensure they are inclusive and accessible for both visitors and locals.

The Tourism & Transport Forum (TTF) welcomes the opportunity to provide comment to *Framing the Future: Developing an Arts and Cultural Policy for NSW* discussion paper. TTF recognises the intrinsic links between the visitor economy and our creative industries and cultural attractions.

It is in the interest of both the visitor and creative economies to harness commonalities and to drive mutually beneficial reform initiatives. TTF has addressed a subset of the discussion paper's priority themes which explores avenues for the government to foster greater engagement in the arts through tourism-related initiatives:

ARTISTS AND CULTURAL ORGANISATIONS ARE CELEBRATED AND SUSTAINABLE

- a. Digital resourcing
- b. Integrated ticketing

¹ Tourism Research Australia (2013) – *International and National Visitor Surveys*, June 2013 editions

² The Visitor Economy Industry Action Plan, NSW Government, 2012

STATE CULTURAL INSTITUTIONS ARE LEADERS IN THEIR FIELD

- a. Sydney's global cultural brand
- b. Linking Sydney and NSW to our national cultural brand

PEOPLE ENRICH AND SHAPE THE ARTS

- a. Aboriginal Knowledge and Cultural Centre

ARTS AND CULTURE FOR, BY AND ACROSS THE WHOLE OF NSW

- a. Major events and festivals
- b. Collaborative approach to marketing cultural tourism

VENUES AND SPACES TO CREATE AND EXPERIENCE ART ARE BUILT AND MAINTAINED

- a. Critical cultural infrastructure
- b. Cultural Precincts
- c. Wayfinding
- d. Events in public spaces

TTF believes developing connections with the visitor economy will assist in improving excellence, accessibility and participation in the creative sector. This will be critical to achieving the stated vision of Sydney and NSW as recognised leaders in arts and culture in the Asia Pacific region. Leveraging the value of the arts and cultural sector can also help NSW reach its aim of doubling overnight visitor expenditure by 2020.

TTF welcomes the opportunity to provide further comment to future discussions regarding the development of the NSW Arts and Cultural policy.

ARTISTS AND CULTURAL ORGANISATIONS ARE CELEBRATED AND SUSTAINABLE

a. Digital resourcing

A key component of improving the sustainability of cultural institutions is to increase participation, not only from locals, but also from high-yielding domestic and international visitors.

While booking methods vary between markets, the majority of visitors from Australia's key international markets, including China, India, United Kingdom, United States and Brazil, rely on the internet for information more than guidebooks and friends and relatives when planning a trip³. It is vital that NSW's cultural institutions have a strong web presence to be included in the 'planning phase' of a visitor's trip.

Digitisation of collections allows cultural institutions to showcase their product online and attract visitors to the physical site. Putting the cultural assets of Sydney and NSW into an international framework helps to attract attention from around the globe. To bring NSW's cultural institutions in line with world's best practice, while also increasing awareness and visitation, increased investment in digital resourcing is required.

RECOMMENDATION

- Increase digital resourcing for cultural institutions to leverage the value of the visitor economy.

b. Integrated ticketing

Integrated ticketing simplifies public transport by allowing people to make a journey that involves transfers within or between different transport modes with a single ticket. Many destinations such as Melbourne, Hong Kong and London have integrated ticketing options for visitors which also integrate information and sometimes access to visitor and cultural attractions.

Increasing visitation to cultural attractions will mean streamlining processes to make it easier to coordinate transport and visitor activities. TTF commends the NSW government on the roll-out of the Opal card, though options for visitors need to be included if Sydney is not to fall behind other destinations.

Sydney should, at a minimum, have a dedicated Opal visitor pack to encourage visitor use of the card and improve visitors' transport experience. Melbourne's myki card is a good example of tailoring the transport product to suit visitors while causing minimal interruptions to normal procedures. The myki visitor pack includes a preloaded myki transport card, a map of the city's tram system, instructions on how to use the trams, discount vouchers for popular tourist attractions in Melbourne, and a card holder designed by renowned Melbourne cartoonist Mark Knight. TTF recommends a similar product be developed with the roll-out of the Opal card.

³ Distribution 2020: Situational Analysis, PwC, 2013

Long-term plans for a more sophisticated system of integrated ticketing should also be considered. A more sophisticated product would allow visitors to access both attractions and transport on the one card, similar to the London Pass product.

RECOMMENDATION

- Work with Transport for NSW to develop an integrated ticketing product for visitors alongside the roll-out of the Opal card.

STATE CULTURAL INSTITUTIONS ARE LEADERS IN THEIR FIELD

a. Sydney's global cultural brand

The World Cities Culture Report 2012, which identified Sydney as one of nine great cultural cities, stated that culture gives a city its 'distinct appeal'. Cultural excellence is a key factor in attracting people to a destination, not only leisure visitors but also business travellers and skilled workers⁴. An opportunity exists to build on the city's existing reputation and to brand Sydney as a creative and innovative regional leader through its cultural institutions, and in particular, their international touring programs.

Iconic Sydney-based cultural institutions, such as the Sydney Theatre Company, earn critical acclaim when they tour internationally. Sydney Theatre Company's production of *Uncle Vanya*, with Cate Blanchett and Richard Roxburgh, which toured in New York City, was very well received by both critics and audiences and featured in the 2012 Lincoln Centre Festival.

International touring can provide significant economic benefits for a destination through an increased profile as well as the relationships developed with presenting partners and the global cultural network. Engaging in this network helps to build pathways for promoting Sydney's cultural and creative sector on the world stage, while international audiences gain an increased understanding of the diversity and excellence of Sydney's creative sector.

RECOMMENDATION

- Partner with iconic Sydney-based cultural institutions to leverage the branding value of their international touring programs and to gain recognition for cultural excellence.

b. Linking Sydney and NSW to our national cultural brand

Sydney and NSW are indisputably among the national leaders in the arts and cultural space, being home to over one third of the country's major performing arts companies and world-renowned cultural institutions such as the Sydney Opera House. Having said this, international visitors are generally much more aware of Australia's national brand and it is important to link into this to improve the global perceptions of Sydney and NSW's leadership in this area.

Tourism Australia and Austrade do a significant amount of work in the area of improving Australia's international reputation as a creative and innovative destination and trade partner. This includes, for example, Austrade's Brand Australia program, Australia Unlimited, which includes 'culture' as a key priority theme. In 2013, Tourism Australia supported an exhibition of Australian indigenous artwork at the Musée du quai Branly in Paris, profiling Australia's unique cultural heritage. Tourism Australia provided a 12-page brochure on Australia's indigenous tourism experiences and a dedicated campaign page on Australia.com.

⁴ The World Cities Culture Report 2012

Strategically linking Sydney and NSW's cultural brand to the national work done by Tourism Australia and Austrade is the most efficient way to gain international recognition and status as a cultural destination.

RECOMMENDATION

- Link Sydney and NSW to the national cultural brand through strategic partnerships with Tourism Australia and Austrade.

PEOPLE ENRICH AND SHAPE THE ARTS

a. Aboriginal Knowledge and Cultural Centre

Most Sydneysiders and visitors have little opportunity to engage or increase their understanding of our state's indigenous heritage. While some quality indigenous tourism experiences are available, such as the Royal Botanical Garden's Aboriginal heritage tours and the Australian Museum's indigenous collection, there is still large and unmet demand for authentic indigenous experiences.

TTF commends the NSW government for the successful 2013 Corroboree Festival. The 10-day event in November featured nine of Sydney's major arts and cultural institutions including Bangarra Dance Theatre, Museum of Contemporary Art Australia, Sydney Opera House, and The Royal Botanic Gardens. Building on the success of Corroboree and the evident demand for indigenous experiences, a permanent Aboriginal Knowledge and Cultural Centre at Barangaroo would be a welcome addition to Sydney's cultural landscape. The centre would provide opportunities for locals and visitors to develop their understanding of modern and historic indigenous Australian culture, and a place to share stories and collections of indigenous art with a wider audience.

RECOMMENDATION

- Fulfil commitment (26A) in Visitor Economy Industry Action Plan to work with the Barangaroo Delivery Authority and Department of Aboriginal Affairs to scope a dedicated cultural centre at Barangaroo.

ARTS AND CULTURE FOR, BY AND ACROSS THE WHOLE OF NSW

a. Major events and festivals

Major events and festivals play an important role in the visitor economy, driving consumer decisions to travel and contributing to the cultural identity of a destination. Both the NSW 2021 Plan and Visitor Economy Industry Action Plan recognise the importance of attracting major events to grow NSW as a global tourism and event destination

Sydney and NSW are fortunate to have a strong, existing calendar of major events coordinated through the state's tourism and events agency, Destination NSW. The excellent range of cultural events in both Sydney and NSW's regions include Vivid Sydney, the Paris Opera Ballet, Parkes Elvis Festival and the Tamworth Country Music Festival. The NSW Arts and Cultural Policy must recognise the economic and social value of these events, and continue to support them.

RECOMMENDATION

- In line with NSW 2021 Plan and Visitor Economy Industry Action Plan, continue to support major events in recognition of the financial and social contribution they provide to local economies and the state's visitor economy.

b. Collaborative approach to marketing cultural tourism

For Sydney to be acknowledged as a cultural leader in the Asia-Pacific region, a collaborative approach to the marketing of its cultural offering is needed. An opportunity exists to raise the profile of Sydney's cultural tourism product under the semi-established brand of the 'Sydney Cultural Ribbon'.

The German city, Frankfurt am Main, brought together key cultural institutions to develop a printed and online guide listing their cultural tourism product, opening times, cost of entry and a map of their locations. This initiative was also integrated with other tourism product including restaurants, cafes, and public transport, and was made available to visitors at information centres, hotel concierges, and online.

Victoria has a similar product with Tourism Victoria, Arts Victoria and the Victorian Employers' Chamber of Commerce and Industry (VECCI) working together to produce the annual 'Victorian Cultural Guide'. This piece of marketing collateral is aimed at cultural tourists and lists the cultural and heritage attractions available in Melbourne and Victoria's regions.

A similar guide for Sydney's numerous cultural and heritage institutions would raise the profile of the city's cultural offering. Centralising the information makes it more accessible for visitors who may be unaware of the cultural offering in Sydney. For the well-travelled cultural tourists, a complete guide would demonstrate the diversity in product.

RECOMMENDATION

- Destination NSW and Arts NSW work together to produce a cultural tourism guide.

VENUES AND SPACES TO CREATE AND EXPERIENCE ART ARE BUILT AND MAINTAINED

a. Critical cultural infrastructure

The Sydney Opera House is a key national asset, contributing \$775 million to the Australian economy every year and with a cultural and iconic value of \$4.6 billion⁵. The House's role as a cultural institution, visitor attraction and globally recognised symbol of Sydney's creativity and beauty means its renewal project is one of the most critical infrastructure requirements in the state.

The Opera House needs to upgrade decades-old theatre plant and equipment and become compliant with building codes, safety and accessibility legislation. The work is also required to meet increasing audience expectations and deal with the exponential growth in visitor numbers. The industry is seeking timeframes and funding commitments to address these deficiencies and maximise the Opera House's commercial potential, in time for its 50th anniversary in 2023.

RECOMMENDATION

- Provide funding and timetable commitments for the renewal of the Sydney Opera House.

b. Cultural precincts

While major physical infrastructure requirements are important, the role of transport access, visitor wayfinding and event programming is also integral to creating lively and active cultural precincts. Key cultural and visitor precincts in Sydney include Circular Quay and Walsh Bay.

Circular Quay

Circular Quay is the gateway to Sydney for many visitors and is also bookended by great cultural institutions with the Sydney Opera House and Royal Botanic Gardens in the east and the Museum of Contemporary Art Australia in the west. Despite the enormous potential of the precinct, many areas are aesthetically unattractive and hard for visitors to navigate. The fact that 16 land managers, government stakeholders, and consent authorities play a role at Circular Quay means it is challenging to develop a coordinated vision for the precinct.

Priorities for Circular Quay include gaining consensus on the Cahill Expressway. If it is too expensive to sink the expressway, consideration should be given to how it can be improved. Options include creating a New York-style highline or wrapping the exterior in public art. Another major issue is the use of Circular Quay as a major transport hub and bus interchange with more than 70 bus routes going through the Quay.

TTF recommends the NSW government deliver a master plan for Circular Quay with funding attached. In addition to this, an authority which is empowered by government and is also accountable to deliver the project, must be assigned.

⁵ How do you value an icon? The Sydney Opera House: economic, cultural and digital value, Deloitte Access Economics, 2013

RECOMMENDATION

- The NSW government delivers a master plan for Circular Quay with funding attached; and
- The NSW government empowers an authority to deliver the master plan.

Walsh Bay

The Walsh Bay precinct is becoming an increasingly important component of Sydney's cultural identity. The development of neighbouring Barangaroo will also mean Walsh Bay is in a prime location for residents, workers and visitors to use this revitalised precinct. As a result, Walsh Bay must be appropriately activated through a mix of cultural, hospitality and transport options to make it inclusive and accessible.

TTF acknowledges the work of the NSW government in the delivery of the Walsh Bay Arts Precinct Master Plan which will have anticipated benefits for both locals and visitors who use the precinct.

RECOMMENDATION

- Continue master planning process for the Walsh Bay arts precinct with funding and timetable commitments in 2014.

c. Wayfinding

Unlike other cities, Sydney does not have all its cultural assets in one central precinct. While the joining of cultural institutions along the waterfront into the 'Sydney Cultural Ribbon' is a unique and interesting feature of the city, it does make wayfinding for visitors more challenging. Many visitors currently find it difficult to navigate between sites such as the Art Gallery of NSW and the Sydney Opera House, as well as the Museum of Contemporary Art Australia and Walsh Bay. An improved system of wayfinding will enhance the visitor experience as they can spend more time taking in Sydney's cultural landscape and other visitor attractions.

TTF acknowledges the work of the City of Sydney in its 'Legible Sydney Wayfinding Strategy' which includes many key features from Transport for London's world-renowned 'Legible London' project. One of the most important features of the 'Legible London' project was consistency of design and location across the city. For example, 'Legible London' maps are always located at the entry/exit points of every tube station, helping visitors know where to find information.

For the successful implementation of a consistent wayfinding system in Sydney, the NSW government, City of Sydney and other land managers will need to work together.

RECOMMENDATIONS

- The NSW government, City of Sydney and other land managers work together to implement a successful, consistent wayfinding system in Sydney.

d. Events in public spaces

A unique feature of the NSW events calendar is the number of events which are held in stunning outdoor locations, such as Sydney Festival, Handa Opera on the Harbour, Byron Bay BluesFest and TropFest. Events held in state-managed outdoor venues not only improve the event experience by providing a stunning destination backdrop, they contribute to the commercial sustainability of the organisation. They also provide a strong promotional platform, with coverage of events showcasing the locations as potential destinations for visitors from around the world.

TTF recommends the NSW government continue to recognise and support the commercial, cultural and tourism return generated for Sydney and NSW through events held at state-managed venues such as the Royal Botanic Gardens, The Domain, Centennial Parklands, Barangaroo, The Rocks and Darling Harbour.

RECOMMENDATION

- Recognise and support the commercial, cultural and tourism return generated for Sydney and NSW through events held at state-managed venues.

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