

## **Strategic Issues for Australian Tourism 2008**

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### Published

2009

### Version

Version of Record (VoR)

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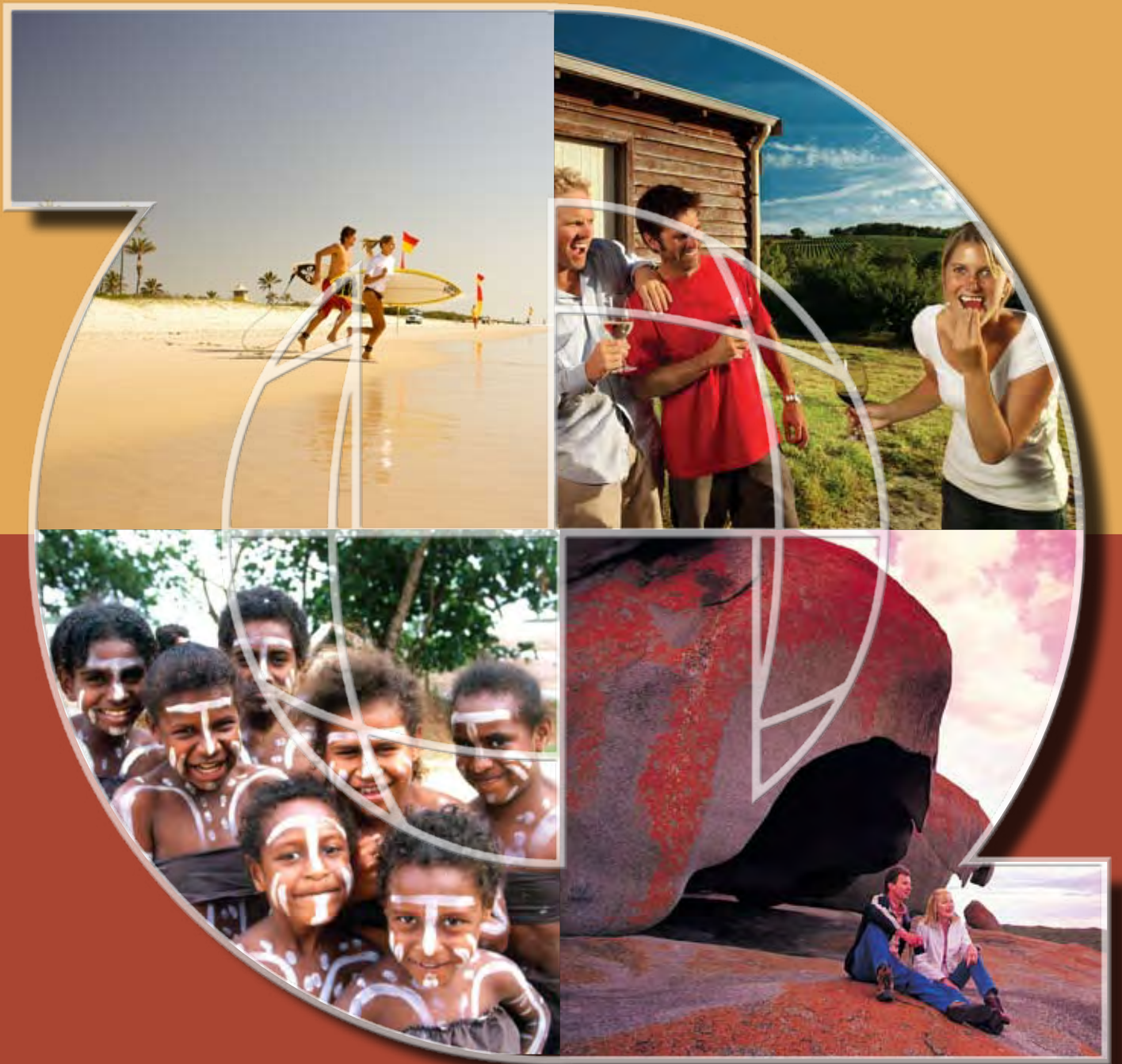
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# STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008



*Char-lee McLennan*

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## **National Library of Australia Cataloguing-in-Publication Entry**

Author: McLennan, Char-lee.

**Title:** Strategic issues for Australian tourism 2008 / Char-lee McLennan.

ISBN: 9781921658112 (pbk.) 9781921658549 (pdf)

Notes: Bibliography.

Subjects: Tourism—Australia. Strategic planning.

Other Authors/Contributors: Cooperative Research Centre for Sustainable Tourism.

**Dewey Number:** 338.479194

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First published in Australia in 2009 by CRC for Sustainable Tourism Pty Ltd

Printed in Australia (Gold Coast, Queensland)

## **Acknowledgements**

The Sustainable Tourism Cooperative Research Centre, established and supported under the Australian Government's Cooperative Research Centres Program, funded this research.

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## **EXECUTIVE SUMMARY**

Over the next decade and beyond, the Australian tourism industry will face many challenges, including industry development in an unstable economic environment exacerbated by increasingly scarce resources, changing consumer behaviour and environmental issues such as climate change. The world is likely to become more complex in the future and to ensure the negative impacts on future generations are not significant, integrated holistic management of fragile resources is required. Understanding the future and how the change process occurs has become a necessity to meet approaching challenges. Considering the needs of future generations requires long-range planning that is focused on efficiency and guided by ethical values (Alexandra & Riddington, 2007). It has become imperative for the tourism industry to change its previous focus on volumetric growth and shift towards sustainable development through an integrated destination management approach and corporate social responsibility.

This report was undertaken at the request of Sustainable Tourism Cooperative Research Centre (STCRC). It provides an overview of four Industry workshops hosted in late 2008 by STCRC in partnership with Tourism Australia. The workshops brought together 82 key tourism representatives from a broad cross-section of the industry. The goal was to develop a vision and identify key strategic issues, pressing policy objectives and research and development requirements for the Australian tourism industry. In particular the workshops aimed to ascertain the industry's opinion on core research priorities and to support the development of a national tourism research agenda, including the medium- to long-term research priorities that might be relevant to the role of a CRC or similar agency, in the future.

This study employs secondary content analysis to assess the workshop material. This is a recognised qualitative methodology commonly applied in tourism planning (Dey, 1993; Glesne, 1999; Janesick, 2000). The national level broad themes that emerged were:

- applied research and modelling
- research management, dissemination and use
- consumer behaviour
- marketing
- internationally competitive, domestically cooperative
- destination management and planning
- policy
- leadership
- advocacy, engagement and communication with community and local government
- environmental issues i.e. climate change and land use
- access and aviation
- industry and business development
- investment
- innovation, product development and quality
- labour and skills development
- technology
- performance measurement
- sustainable development and triple bottom line
- risk management, adaption and transformation
- business events, major events and festivals

It was evident that representatives at the workshops generally believed the industry currently lacks the skills, tools and resources it requires to properly adopt a sustainable tourism development process.

*Chapter 1*

## **INTRODUCTION**

In recent decades the Australian tourism industry has been a significant contributor to the country's economic growth, but in some areas it has had detrimental consequences (Ruhanen-Hunter, 2006). While economic progress can result in greater wealth and social prosperity, it can also have delayed negative impacts on society and the environment. The time lag that often occurs before the social and environmental consequences are noticeable means present development can have significant unanticipated impacts on future generations (Alexandra & Riddington, 2007). This characteristic of tourism development means that it needs to be guided by pre-emptive, long-term, ethically informed strategies. Responsible planning should adopt a sustainable development paradigm; a deliberate institutional and structural shift to such a platform is commonly termed a 'transformation process' (Schweitzer, 2007; Taylor, 2008).

This study builds on a previous STCRC report which provided review of the strategic thinking guiding the Australian tourism industry over the decade to 2008 by undertaking content analysis of 76 Australian national, state/territory, regional and local tourism strategic planning documents (McLennan & Ruhanen, 2008). It summarises key strategic issues currently or potentially impacting on the industry at the time of the workshops and provides insight into visions and goals likely to guide Australian tourism in the future. It also details workshop identified needs and requirements for research and development, which must be met for the industry to overcome the issues and achieve its strategic vision.

This study's objectives are met by undertaking a detailed review of 82 industry representative's comments at four workshops allowing key strategic issues and priorities to be identified and ranked. In this way it provides insight into the future development needs of the Australian tourism industry. This report provides a summary of the key issues and challenges for the industry as identified by participants at the Industry workshops.

This report is structured as follows:

- **Background and Methodology of the Study**
- **The Tourism Industry's Vision and Goals for the Future**
- **Summary of the Key Strategic Issues**
- **The Tourism Industry's Priorities for STCRC**
- **Discussion of the Key Strategic Issues**
- **Conclusion**

*Chapter 2*

## **BACKGROUND AND METHODOLOGY**

This synthesis of issues arising from the four Industry workshops was undertaken at the request of STCRC. The primary objective is to undertake content analysis of the material produced at the workshops and provide a summary report of key strategic issues currently and potentially impacting on the Australian tourism industry. This report also seeks to build on and expand the results from an earlier STCRC publication (McLennan & Ruhanen, 2008). By meeting these objectives, this study aims to assist the development of a future national tourism strategy and research agenda and represents a typical but vital stage of a tourism visioning process (Faulkner, 2002).

In November and December of 2008, STCRC partnered with Tourism Australia to hold a series of industry workshops to identify strategic issues likely to impact on Australian tourism in the future. The workshops brought together 82 industry representatives from a broad variety of key tourism sector agencies and organisations, representing all states and territories. In total four workshops were hosted in Sydney, Melbourne, Brisbane and Perth with the objective of determining broad national level key strategic issues for the Australian tourism industry in the future. The key issues identified were subsequently used to develop the STCRC Research Program for the Round 11 CRC Program Application in March 2009.

The workshops built on a framework devised from a series of consultative one-on-one meetings across the tourism sector which aimed to identify strategic issues impacting on Australian tourism, as well as strategic projects by Tourism Transport Forum (Project X) and National Tourism Alliance (*Tourism in Australia: Future Directions 2009–14*). The purpose of the workshops was to:

- identify strategic and scientific research requirements for the Australian tourism industry to 2020;
- inform a national research plan and deliver a comprehensive national tourism research program; and
- inform a proposed future research agenda for STCRC.

To standardise the workshops, each had the same facilitator and followed a similar structure. As an initial ‘warm-up’ exercise, the workshop participants were asked to help propose a tourism vision and strategic plan for Australia to 2020 and to identify the knowledge and tools that might be required to achieve these goals. The aim of this exercise was to provide insight into the possible strategic path of the industry in the future and to determine if all workshops were consistent in their visions.

Following this introductory exercise the workshop participants were asked to focus on four particular themes that were identified as key issues during earlier industry consultation processes, STCRC network meetings and review of the TTF and NTA strategic projects listed above. The themes were:

1. Destination management and sustainable destinations
2. Industry development and sustainable enterprises
3. Consumer demand
4. Climate change

For each of the four themes the workshop participants were asked to identify key issues and challenges, to brainstorm possible information requirements needed to address the issues and to lastly determine STCRC priorities. As a result of this *ex ante* determination of these key discussion points it is possible that a bias towards these themes may have been introduced within the workshop material.

This report assembles the raw data from the workshops into a logical and comprehensive summary of the key strategic tourism issues. Content analysis was employed to analyse the material resulting from the four workshops. This technique is a common method employed in tourism planning and allows for topics to be unearthed through grouping and coding issues logically together (Dey, 1993; Glesne, 1999; Janesick, 2000). All issues that arose from the workshops were coded by workshop location and were then pooled to reveal collective issues from all workshops across all themes. Appendix A presents the individual key strategic issues which arose from all four workshops and Appendix B presents the national level broad themes which the individual issues could be grouped into. A disaggregated version of the coded key strategic issues, grouped and ordered by national level broad themes, is at Appendix C.

Key issues that emerged from the Sydney, Melbourne, Brisbane and Perth workshops are at Appendix D, E, F and G respectively.

Limitations of this study are mainly associated with the method used to collect the data. As data were collected from industry workshops, this study may be influenced by issues impacting on larger tourism organisations and destination management agencies. Another limitation is that attendees were more likely to be from larger and more influential entities and from those based in Sydney, Melbourne, Brisbane and Perth, although representatives were invited from all states and territories. There is possibly a bias towards more confident industry representatives who would be more likely to raise their opinions and a potential underrepresentation of particular groups in terms of actual numbers of participants (i.e. major and business events representatives). A final possible bias would be misinterpretation, miscoding and personal biases associated with the researcher, however great care has been taken to report as accurately and impartially as possible.

This report assumes readers are likely to be tourism industry representatives and experts and has not provided extensive explanation of industry-related concepts arising from the workshops.



*Chapter 3*

## **THE TOURISM INDUSTRY'S VISION AND GOALS FOR THE FUTURE**

The National Tourism Alliance (NTA) in *Tourism in Australia: Future Directions 2009–14* stated that their vision is 'for Australia to be an **inspiring, authentic and diverse destination** attracting both international visitors and Australians alike—and for this to be achieved by a focus on innovation, sustainability and industry working in partnership with the community and government' (pg. 10, emphasis in original). The NTA's mission was 'to **outperform our competition**, both as a destination and as an activity' (pg. 11, emphasis in original). Their objectives were to improve the industry's labour force, facilitate the industry's sustainable development, support investment and development of the industry through initiatives, such as effective destination management, and to develop 'Brand Australia'.

At the start of the workshops, the industry representatives were asked to consider a collective vision for the Australian tourism industry by 2020. The industry representatives at the workshops noted a need for a long-term national tourism strategy backed by all regions and stakeholders with a clear vision and actionable plan. Supporting the NTA vision, the workshop participants suggested the focus of the strategy should be on cultivating coordinated best practice destinations with clearly defined roles and responsibilities that are aligned to a triple bottom line sustainable development platform implemented through corporate social responsibility.

Similar to the NTA vision statement, the industry workshops identified a series of other key strategic visioning objectives, including:

- developing a strong capable tourism workforce
- increasing the industry's leadership and self management abilities
- increasing advocacy and recognition of the importance of tourism
- developing the industry's viability, productivity, innovation and response mechanisms
- increasing the effectiveness and efficiency of the industry's institutions and structures
- taking a holistic and transparent approach
- increasing opportunities and reducing constraints, barriers and limitations to tourism investment
- gaining insights into current and future consumer behaviour
- supporting the industry through strategic and applied research and insights.

The Sydney workshop vision was concentrated on industry advocacy; destination management; and research. Melbourne participant's aspirations related to increasing industry development; innovation and learning; and gaining insights into present and future consumer behaviour. Brisbane was focused on destination management and planning; and strategic and applied research. The Brisbane workshop had the strongest emphasis on research out of all of the workshops. Perth highlighted destination management and planning, however it provided a broader range of goals and also postulated increasing advocacy and insights into current and future consumer behaviour.

*Chapter 4*

## **SUMMARY OF KEY STRATEGIC THEMES AND ISSUES**

The key message from the workshops is that there is a need for institutional and structural change within the tourism industry to enable it to achieve its vision and meet future challenges, such as climate change. The proposed strategy for the industry was to undertake destination management that could guide the industry towards sustainable tourism. However it is recognised that current structures and modelling tools are not able to aid the process effectively.

Of key priority to the industry was the need to develop a long-range national tourism strategy and research agenda to guide the industry as it transforms to a sustainable development platform grounded on economic and resource efficiencies and corporate social responsibility. This strategy should seek to determine evolutionary ideals and values to be pursued by the industry in the future and provide practical and applied tools that can guide the transformative process, monitor progress and identify inefficiency and instability. Workshop participants also proposed the need to increase applied research and modelling to close the clear gap between theory and practice. The development of predicative and strategic decision-making models that provide insight into consumer behaviour and best practice destination management was seen as critical.

The national level broad themes identified by the industry representatives at the workshops were:

- applied research and modelling
- research management, dissemination and use
- consumer behaviour
- marketing
- internationally competitive, domestically cooperative
- destination management and planning
- policy
- leadership
- advocacy, engagement and communication with community and local government
- environmental issues i.e. climate change and land use
- access and aviation
- industry and business development
- investment
- innovation, product development and quality
- labour and skills development
- technology
- performance measurement
- sustainable development and triple bottom line
- risk management, adaption and transformation
- business events, major events and festivals

Assessing the strategic themes by individual workshop reveals some notable differences (Table 1). In terms of contribution, the Sydney workshop proposed the highest number of issues (31%), followed by Brisbane (28%), Melbourne (27%) and Perth (14%). All ranked applied research and modelling as the key strategic theme. Issues and challenges associated with research were the need for: the development of a national research agenda; triple bottom line applied modelling; greater understanding consumer behaviour; increasing data availability and local level modelling; and research training and dissemination (particularly for local areas).

**Table 1: Top 5 Strategic Themes by Workshop**

Rank	Sydney	%	Melbourne	%	Brisbane	%	Perth	%
1	Applied Research & Modelling	19	Applied Research & Modelling	24	Applied Research & Modelling	19	Applied Research & Modelling	12
2	Labour & Skills Development	9	Industry Development	10	Destination Management & Planning	8	Market / Marketing	12
3	Market / Marketing	7	Destination Management & Planning	7	Access & Aviation	7	Technology	8
4	Destination Management & Planning	6	Labour & skills development	6	Market/ Marketing	5	Destination Management & Planning	7
5	Advocacy	5	Market / Marketing	6	Climate change	5	Industry Development	5

The Perth workshop had the highest proportionate focus on marketing issues (12%) and was the only state where technology ranked within the top five strategic issues. Other than applied research and modelling, the Sydney workshop had a focus on labour and skills development (9%), Melbourne concentrated on industry development (10%) and Brisbane considered destination management and planning (8%). Brisbane was the only workshop in which access and aviation and climate change were ranked within the top five strategic issues. In this context, the discussions focused on increasing access, particularly low-cost carriers, while mitigating the impacts of climate change.

Ten key individual strategic issues were also identified from the industry workshops:

1. Indicators and best practice destination models
2. Economic impact scenario models for tourism
3. Understanding the current tourism market and its needs
4. Understanding current consumer behaviour generally
5. Insights and modelling of future consumer behaviour and tourism market
6. Tracking global trends in consumer behaviour and economy
7. Labour issues
8. Aviation issues
9. Destination/business management, planning, monitoring and evaluation
10. Triple bottom line

## *Chapter 5*

### **DISCUSSION OF KEY STRATEGIC ISSUES BY THEME**

This section presents a summary of the key strategic issues likely to impact on the tourism industry in the future as identified by the workshop participants. Individual issues which emerged are discussed within their broad themes. Individual strategic issues are discussed within the context of these broad themes under the relevant heading.

#### **Applied Research and Modelling**

An earlier analysis of Australian tourism strategic planning documents (McLennan & Ruhanen, 2008) identified a need to develop current research capabilities and provide additional applied research. Similarly, the workshops highlighted developing the industry's applied research and modelling with a focus on developing metrics, indicators and best practice models and data generation tools for:

- destination development
- destination performance measurement
- assessment of triple bottom line scenarios and practices
- facilitating innovation
- regional and local area data sets.

The development of triple bottom line destination management models was seen as a way to facilitate the planning and development process. Development of these models could occur by developing performance measurement tools and designing templates or models of best practice regions. It would be prudent to compare the similarities and differences between:

- successful and weak organisational structures and planning schemes
- destinations within Australia
- Australian and international destinations
- different types of destinations (i.e., coastal, rural or mountain, urban or non-urban, developed or undeveloped)

Emphasis was placed on the development of tourism economic models to facilitate advocacy of the industry and to provide insights into how structural changes impact on the tourism industry. Research in this area should be focused on investigating the impacts of increased transport costs, the emissions trading scheme, climate change, the global economic crisis, the resource boom and the decline in agriculture. There was a call for the development of regional and local level Tourism Satellite Accounts and triple bottom line impact models.

#### **Research Management, Dissemination and Use**

The workshops requested a national tourism research strategy, better connection between research agencies and a centralised knowledge database. They argued for new types of tourism market research and assessment of the type of information that industry needs and uses. It was indicated that there is a lack of quality local level data, poor research coordination and data management and little industry uptake of research. Improving local level data through panel data (longitudinal and cross-sectional) research was seen as a key priority, but it was recognised there is a need to ensure the collection is cost effective and robust. There was also a call for product and destination benchmarking both within Australia and internationally and demand for case studies that assess success and failure of destinations. It was proposed that a research strategy should be developed that aims to:

- manage the research process, data and dissemination
- collect the most appropriate data in the most appropriate way
- disseminate the information to industry
- engage and educate industry on use of data and information.

An emphasis was notably on dissemination to industry, particularly on training the industry on how to undertake collaborative research and providing data in a user friendly format. It was proposed that research should be distributed and communicated in new and more tailored ways. There was a call for a centralised

knowledge database which could be accessed and added to by industry, government (at all levels) and researchers.

## **Consumer Behaviour**

Linked directly with marketing (below), consumer behaviour was a central discussion topic for workshop participants, with an obvious need to increase the industry's understanding of the current and future tourism consumer and what factors may influence behaviour. Trend tracking, scenario modelling, longitudinal and cross-sectional data collection and qualitative assessments of consumer behaviour were suggested as efficient ways to obtain insights. Detailed visitor profiling was seen as crucial for determination of the characteristics of the international and domestic visitor and should include social and economic factors likely to influence their travel choices.

Research should firstly seek to understand consumer behaviour and decision-making processes generally, and then gain insight into and pre-empt possible trends and needs for both the domestic and international tourism visitor of the future. Investigations should centre on general social, attitude and motivational trends associated with:

- Baby Boomers, Generation X and Generation Y
- China, India and the Middle East
- the impact of technology and 'virtual reality'
- possible market responses to climate change

Long-term panel data collections and modelling of consumer behaviour, perceptions and demand over time were considered essential. Simply understanding the current market will not be sufficient to remain competitive in the future and the focus of analysis needs to expand to the potential global tourism market. The industry representatives proposed panel data surveys and consumer focus groups as ideal collection methodologies. Potential avenues for research relating to consumer behaviour were related to:

- understanding how long-haul Australian markets consume tourism in short-haul destinations and what factors would cause them to switch to long-haul travel
- understanding how increasing global wealth is developing new tourism markets
- understanding how visitor volumes are related to changes in economic activity, wealth and exchange rates
- determining if there is a generational change resulting in a shift from pure nature based tourism to adventure tourism and determine underlying causes
- determining if there is a shift from package to free and independent travellers and underlying reasons why this may be occurring
- tracking Australia's performance in terms of share of all international markets.

It was recommended that segmentation should be based on psychographics. However it was indicated that the current Australian tourism psychographic models require development and refinement for the potential future tourist. It was also stressed that research results must be transparent and disseminated to all levels of industry.

## **Marketing**

Strategic planning documents generally considered previous marketing efforts as being ineffective, un-adaptive, inequitable, fragmented and resource intensive; mainly due to diversity of product and the need to cater to a variety of stakeholders. For the future, the Industry workshops advised going back to marketing 'first principles' to create a clear Australian destination image or brand and ensuring the experience delivered matches the brand. That is, ensuring 'tourism marketing is consumer to product and not product to consumer' (Sydney Industry workshop). This was related to understanding the current market needs and predicting possible future consumer behaviour.

Despite this, the industry representatives recognised that it is necessary to ensure the market 'fits' with Australia and that the most appropriate market is being targeted to ensure sustainable development of the country and its regions along the triple bottom line platform. A priority was seen to be identifying and developing new and emerging markets. Markets seen as key priorities were international (i.e. China, India and the Middle East) and special interest/niche markets (i.e. adventure and Indigenous).

Strategies for developing the markets included:

- using media to maximise marketing efforts
- engaging markets through different communication and technological media.

It was suggested that pricing metrics and portfolio of current and potential products should be developed to inform positioning strategies and align them with consumer decision-making. Marketing initiatives should also identify market demand and expectations and ensure market (demand) and product (supply) optimisation and matching. It was considered wise to ensure independent monitoring and evaluation of both market performance and marketing effectiveness.

## **Internationally Competitive, Domestically Cooperative**

As noted earlier, the analysis of the strategic planning documents identified that tourism has previously been focused on product diversification and marketing efforts have attempted to use the diversity of product as a marketing strategy. Combined with this, there has typically been strong competition amongst destinations within Australia which has limited the ability to present clear marketing messages to consumers. These issues have resulted in lacklustre growth and criticism of marketing activities.

The industry workshop identified that in the future the strategy would be to present a clear message to the consumer. Development of a competitive tourism industry requires increased cooperation within Australia to ensure a strong competitive advantage within the global marketplace. The debate over whether Australian destinations should compete or collaborate was termed 'competition versus co-competition' by participants at the Brisbane Industry workshop. The industry representatives agreed that current competition between states and destinations has reduced Australia's competitive viability within the global market place, particularly as there is strong competition and economic instability. It was indicated that Asia is currently out competing Australia in terms of quality and price. It was agreed that there is a need to find competitive advantage by:

- highlighting distinctive Australian tourism products that are definitive of Australia to represent the country
- ensuring increased coordination and information diffusion between destinations and between the public and private sectors
- monitoring Australia's international competitive advantage and point of difference
- having a national strategic plan focused on maintaining competitive advantage beyond 2020.

## **Destination Management and Planning**

A priority for the workshop participants was destination management and planning, suggesting that the industry has shifted away from its previous focus on destination marketing. Workshop outputs indicate that the focus needs to be on:

- a holistic, cooperative and coordinated strategic destination management approach
- strong single message and industry advocacy
- integrating national tourism planning into local and state government policy
- long-term industry agreed national vision and strategy
- addressing barriers and constraints in planning and investment (i.e. in infrastructure)
- planning, management and action at the local level
- understanding product development impacts.

Workshop participants identified the need for regional collaboration, as opposed to competition. This was seen as essential to improve marketing efforts and to provide a strong and consistent message of the importance and contribution of the tourism industry. Enhancing coordination and linkage across destinations, public agencies and the private sector was seen as critical and this could be achieved through a long-term national level strategic plan that is streamlined and integrated within local and state government level policy. It was suggested that strategies should be composed of short-term tactics, medium-term strategies (10 years) and long-term visions (40 years) that are supported by both industry and government.

The workshop material indicated a triple bottom line 'balanced scorecard' approach should underpin development, but that there is a lack of knowledge and consensus concerning what constitutes 'best practice' or 'leading edge' destination development. Defining values, goals, priorities and needs for destination development would provide clarity and allow the accumulation of industry resources, knowledge and management capacity to

enable the adoption of the approach. Improving planning, management and approval processes would also facilitate infrastructure, place, land-use and local management. There is a need to identify and address barriers, constraints and problems, particularly those associated with town planning, investment, small business (i.e., accommodation) and inbound tourism. There was discussion concerning visitor management, ensuring visitor friendly distribution channels and destinations, providing the right experience and enhancing visitor services.

The key message surrounding destination management and planning was a need to provide sustainable development metrics that could be integrated into the performance measurement of the tourism sector. It was suggested this could be achieved through a destination management approach and educating and guiding the tourism industry towards these ideals. The industry representatives suggested that there is a need for better informed destination managers and leaders and that their skills, capability and knowledge need to be developed to enable them to guide and grow the tourism industry appropriately.

### **Policy**

It was identified in the analysis of the strategies that there was a need for a ‘whole of government’ approach, but that there is a lack of role clarity, coordination and policy alignment. National strategic direction, decision making, coordination and advocacy is required, although it is important to ensure promises are kept. Issues arising from the workshops related to policy were:

- ensuring flexible policy that enables and supports tourism development
- developing carbon offset programs
- identifying and reducing policy failures
- identifying and reducing taxation inequities and inefficiencies
- developing best practice policy frameworks.

Independent assessment of tourism policies and legal frameworks should be undertaken to increase policy effectiveness, efficiency and flexibility, reduce regulation and taxation where appropriate and develop best practice tourism policy frameworks and guidelines. Defining roles and responsibilities in terms of government was seen as important—along with an assessment of the impact larger local governments have on the tourism industry. Associated with this was the requirement to ‘get the nexus right’ (Brisbane industry workshop) with the suggestion that there should be global thinking, but local action.

Tourism needs to be recognised as a key priority for the Australian government and its ‘share of policy voice’ needs to be increased, implying advocacy. Industry representatives suggested assessing government support for the industry, through infrastructure development, skills development and management, and comparing this with other industries. It was proposed that it may be necessary to initially regulate for sustainable development or implement carbon offset programs, but that this would only be a short-term strategy.

### **Leadership**

An issue which emerged frequently across a broad range of workshop themes was the lack of well-defined and skilled leadership for the industry. In both the strategic planning documents (McLennan & Ruhanen, 2008) and the Industry workshops there was debate over the roles and responsibilities of stakeholders in the management of the industry. A key question which arose was how to develop a coordinated approach given high levels of industry fragmentation. The planning documents generally concluded that the industry should be led by a combination of government and private sector-coordinated leadership to ensure effective sustainable development. However the strategic documents described the industry as currently being mainly government led and claimed strong tourism industry leadership needs to be developed.

The workshops also remained divided. On one hand, the argument was that the industry needs to develop its capacity to self manage and lead itself, thereby reducing reliance on government which should instead take a facilitator role. On the other hand, various reasons for the government to remain actively involved in the industry were put forward, including addressing market failures, ensuring appropriate industry values and providing assistance in particular areas, such as regional and Indigenous tourism development and in areas impacted by environmental issues. Defining roles and responsibilities based on best practice destination institutional models was seen as essential, as was building stronger partnerships between government and the private sector.

The workshop participants indicated that the tourism leadership skills gap particularly surrounded destination management and industry leadership in both the public and private sector. A skills audit of current destination managers and leaders would help to identify current skills levels, gaps and development requirements. The audit should aim to compare skill levels between destinations and with other sectors.

## **Advocacy, Engagement and Communication with Community and Local Government**

Advocacy for tourism was highlighted as a key issue by the analysis of the strategic planning documents (McLennan & Ruhanen, 2008). The documents emphasised increasing the profile of the tourism industry with both government and the community and strengthening the industry's collective voice. They also noted a need to increase the industry's profitability, viability and stability and improve the standards of jobs to ensure a good reputation with potential investors and employees.

Likewise, the industry workshops advised developing the government's and community's appreciation of the industry and acknowledgement of the value of tourism. The industry representatives related advocacy to ensuring an inherent corporate social responsibility within the tourism industry. This means that all tourism organisations adhere to laws and ethical guidelines and thereby benefit rather than adversely affect the community. It was advocated by some that the corporate social responsibility approach is more appropriate and efficient than government regulation or carbon offset schemes. Advocacy of tourism focused on developing the community's appreciation and value of the industry by creating an awareness of the cultural benefits and community development that can occur from the activity. It was suggested there is a need to increase the positive contribution of visitors, such as through 'voluntourism'. The workshops suggested demonstrating the value of tourism by revealing how it delivers solutions to government and community on issues like urban drift, water security, Indigenous development and land use conflict.

There was demand for increased engagement and communication with the community (in particular the Indigenous community), local government and industry members. Local government engagement focused on increasing coordination and providing education and tool kits to help them facilitate development and management of the tourism industry. It was recognised that community engagement in the tourism industry should be increased and their 'pride' in the tourism product and positive perceptions of the tourism industry should be enhanced. The Indigenous community was identified as a priority to provide them with further opportunities for development and to enhance the tourism product. It was considered that engagement of local government and the community through a reciprocal relationship would facilitate the shift towards sustainable development. Besides increasing communication with government and the community it was also suggested that communication should be improved across the industry to enhance information dissemination, agency coordination and industry learning.

## **Environmental Issues**

Australia has a unique and diverse natural environment which is a key tourism attraction and focus of tourist interest and activity. Protecting these assets is essential for the long-term viability of the tourism industry. Not only does tourism activity have the ability to generate income, but it can also increase environmental and social awareness thereby facilitating and providing resources for environmental protection and area management. The analysis of the Australian tourism planning documents recognised a need to increase tourist and industry awareness of the importance of protecting Australia's environment and to help the industry evolve so it can facilitate environmental resilience.

The industry representatives called for increased land assessments and planning, as well as monitoring, tracking and managing the 'carbon footprint'. They also proposed using the sustainable 'balanced scorecard' approach, both within tourism and across sectors. The concept of the 'balanced scorecard' was first postulated by Kaplan and Norton (1992) in organisational transformation and performance measurement theory. In the environmental and tourism sphere, the 'balanced scorecard' approach is extended to include environmental accounting and eco-efficiency analysis thereby allowing monitoring of balanced and sustainable development (Moller & Schaltegger, 2005).



In particular it was identified that a significant risk to the Australian tourism industry is climate change as it threatens the viability of businesses reliant on natural assets, such as those in the wet tropics and Great Barrier Reef regions. Possible strategies to avert and minimise this risk were identified as including:

- sector and business adaptation
- offsetting through 'carbon' credit schema
- technological innovation
- development of best practice environmental business and infrastructure models.

The industry workshops identified climate change as an important environmental issue. It was suggested that government planning, support and research should be increased to measure, monitor and strategically manage the industry's 'carbon footprint'. Proposed research included:

- supply-side economic impact analysis of climate change at the regional level
- benchmarking the tourism industry's 'carbon footprint' to other industries
- benchmarking and comparing different carbon offset programs
- investigation into how carbon offsetting impacts on price elasticity
- determination if carbon offsetting is being adopted by consumers
- regional level mapping of the impact of climate change to provide a suitable easily understood medium for communicating the issues.

However carbon offsetting is a reactive and limited response. The participants recognised that there is a need for other mitigation strategies and proposed developing transformative strategies and guidelines to shift the tourism industry to a socially responsible platform facilitative of environmental resilience. Other potential strategies included:

- developing corporate social responsibility in the industry
- land-use management
- natural asset protection
- 'green' accreditation
- environmental management and research
- developing technological efficiencies.

For strategies to be successful there is a need to determine the community and tourism markets' expectations for environmental conservation and mitigation; identify tourism destination and product vulnerabilities; and understand tourism impacts on the environment, particularly associated with cruise shipping, alpine regions, national parks and land use. It is essential to avoid green-wash and a broad understanding of the impacts would facilitate this.

### **Access and Aviation**

Access and aviation still remain a key issue for the Australian tourism industry, with a key focus being on developing viable aviation and access models across a range of destinations. The focus was particularly on aviation issues, such as:

- assessing future possible impacts of low cost carriers
- understanding how low cost carriers impact on consumer behaviour and tourism destinations.

However access also related to the need to develop air, rail and road access and to provide higher quality, integrated public transport networks to aid dispersal. It was suggested that research should seek to assess how travel modes and pricing structures are changing.

### **Industry and Business Development**

The workshop participants suggested there was a need to develop financial and economic productivity to maximise the positive, and minimise the negative impacts. Related discussions highlighted the need to develop and maintain a broad focus on social and environmental outcomes, via a robust institutional structure. The industry representatives suggested research should seek to determine methods for monitoring institutions and economic, social and environmental structures. Support systems need to be devised to aid the industry in its shift towards a sustainable development platform. Development should focus on cultivating industry learning by:

- fostering collaboration and communication
- undertaking industry workshops and development programs

- monitoring changing industry behaviour and learning
- developing appropriate accreditation systems
- increasing structural efficiency and industry productivity
- providing industry support
- advancing businesses' ability to cope with change and remain viable
- increasing business opportunities and innovation
- develop succession planning for existing businesses.

Industry workshops and development programs were viewed as a way to educate operators about sustainable development, drivers of change, how to cope with and adapt to change and how to remain viable. Developing these abilities was considered essential as it would increase investor confidence thereby encouraging maintaining investment levels within the industry. A question arising from the industry workshops was how to engage and incentivise businesses to ensure their attendance at these workshops and programs.

It was suggested that research should monitor changing industry behaviour, report on collective industry outcomes and improvements and investigate business viability with a focus on business establishment costs (particularly in rural areas) and comparing government incentives or assistance provided to tourism with that of other industries. There is also a need to better understand how other industries 'learn' and to determine what restricts and limits tourism 'learning'. Some discussion was held on developing appropriate accreditation systems. The industry representatives questioned the value of accreditation for businesses and suggested aligning accreditation to other processes such as tourism awards. Engagement of Indigenous tourism operators was also identified as an area for improvement and it was proposed this might be achieved through mentoring and global case studies of successful Indigenous tourism development.

## **Investment**

The strategic planning documents discussed increasing investment, particularly in tourism infrastructure. It was suggested that the industry needs to create a vibrant investment climate through partnerships, investment reports, promotion of the destinations and a decrease in planning regulations. The strategies alleged there is a unique difference between investment in well-positioned and growing destinations and those in regional areas that have stable or declining populations. It was evident that there is a need for a more strategic and sustainable approach to tourism investment. The industry workshops also focused on increasing investment, but argued there was a need to:

- ensure returns on investment
- adopt a 'user pays' strategies
- determine optimal levels and limitations of investment (based on individual destination capabilities and community and land/resource capacity)
- increase business viability to attract investment.

A priority was seen as developing a framework which facilitates strong but stable investment and asset management. Ensuring returns to investment was viewed as vital to guarantee viability and sustainability of the tourism industry and to justify and offset government involvement. Opportunities for maximising 'user pays' initiatives were identified, but it was noted that the private sector should be encouraged to undertake long-term investment in infrastructure. A good strategy would be public-private sector investment partnerships.

Workshop participants suggested it is necessary to determine the optimal level of capital investment for a destination in order to match demand and ensure industry and community development. There was also a need to reduce limitations and impediments to investment in the tourism industry and to reduce investment risk. Lastly, the industry representatives recommended assessing the risk differentials between domestic and international investment and public and private sector investment.

## **Innovation, Product Development and Quality**

Over the long-term, the tourism industry will face labour shortages, climate change and profitability challenges, such as increasing land and fuel prices. The industry must be proactive and plan strategies to deal with these future issues. The strategic planning documents identified Australian tourism innovation as typically being focused on creating marketing improvements and developing new products. A key challenge for the industry would be to remain viable by keeping pace with technological changes and finding ways to increase productivity

and profitability and decrease the industry's reliance on labour. There is a necessity to develop a higher yield product, but this should not necessarily mean raising the cost to consumers and maximising expenditure. Instead the focus should be on creating a leading edge industry through effective innovation. The workshops proposed developing an 'innovation strategy' which would encompass:

- fostering entrepreneurship
- product development
- quality enhancements
- productivity improvements.

The process should include the identification of possible opportunities for innovation, product development and enhancements and the determination of the most suitable and effective strategies for developing adaptable products and destinations. There is a requirement to better understand entrepreneurship and how it impacts on destination development. It is also necessary to assess product demand and requirements of target markets and ensure the Australian destination remains differentiated from its international competitors. Adventure, nature based and event tourism and infrastructure construction and enhancement were highlighted as key product development areas.

Discussions focused around ensuring that the product was meeting visitor demands and expectations. It was suggested that destinations and the tourism labour force should be assessed and benchmarked in terms of 'quality' and that standards, accreditations and development programs should be devised and implemented (e.g. New Zealand's Qualmark Green). Productivity enhancements related to enhancing the quality of the labour market and improving technology in the industry. With small tourism businesses—particularly in regional areas—struggling to find employees, there is a need to develop technological tools that would enable them to reduce their reliance on labour while still maintaining a quality product.

### **Labour and Skills Development**

Australia's tourism labour force is—on the whole—high quality and skilled. However, analysis of Australian tourism planning documents identified underlying issues in the tourism labour market which need to be addressed, such as labour shortages (particularly in regional areas) and hidden skilled labour gaps (such as a lack of chefs) (McLennan & Ruhanen, 2008). The industry workshops also identified tourism labour and skills development issues including:

- continuing labour issues (i.e. shortages and skills gaps)
- costs associated with employing staff (i.e. higher quality, regional area recruitment and staff turnover)
- poor industry reputation as an employer.

Continuing labour issues were associated with labour and skills shortages, seasonality, and barriers and costs associated with employing more staff which is limiting the ability of businesses to develop, particularly in regional areas. It should be noted that the Australian employment environment has changed in the period between the industry workshops and the publishing of this report.

Recommended strategies for developing labour and skills in the tourism industry included:

- undertaking targeted skills development
- investigating new or potential sources of labour (i.e., Indigenous, mature aged or migrant workers)
- employing new methods of attracting and developing the labour force
- improving employment conditions, remuneration, career paths and incentives
- improving employer attitudes
- training small- and medium-sized enterprises on how to recruit, retain and train staff
- incorporating tourism into all levels of education
- ensuring curriculum is providing the skills needed for the industry
- improving the image of tourism as an employer
- developing a best practice labour market and knowledge diffusion model.

Research should aim to identify issues and monitor trends in the tourism labour force and should track graduate employment.

## **Technology**

Technology could easily be grouped with innovation, product development and quality. It is separated here to reflect the indication stemming from the analysis of the strategic planning documents that in tourism there is a slight separation between product development and technological development, with tourism having been traditionally focused on developing new or niche products and technology to improve the marketing message (McLennan & Ruhanen, 2008). This focus appears to be slowly changing.

Coupled with the quest to comprehend entrepreneurship, the industry is now calling for a better understanding of how:

- tourism undertakes innovation, technological advancement and diffusion and how other industries innovate and adopt technology
- technology impacts on the tourism industry e.g. digital technology, changing communication channels which could be used to enhance distribution channels (i.e. direct marketing), interpretation technology, strategic research tools (i.e. visitor tracking and monitoring) and knowledge diffusion within the industry
- technology may be used to enhance branding and marketing
- tourism may be developed into a technologically advanced and efficient industry
- technology may be used to create knowledge and educate the industry (e.g. knowledge diffusion).

The key emphasis was on increasing technological uptake within the tourism industry. Technology could be used to find new ways to access and interact with the consumer and also used to educate the consumer on new technologies to ensure uptake. Knowledge transfer within the industry also needs to be improved to increase uptake of new technologies, such as providing information and 'how to' kits on new innovations.

There was some uneasiness amongst the industry representatives regarding the possible substitution of the travel experience for virtual reality and multi-sensory technology (e.g. virtual business meetings). However, technology can also facilitate cost reductions and profit enhancements which will maintain the viability and sustainability of the industry and can mitigate environmental impacts. Obvious innovation is required in aviation. Long-haul aviation is vital to Australia, yet climate change has seen it criticised. With reducing long-haul travel being impractical, the initial response has been to introduce carbon offsets; however this may create pricing distortions within the industry. Innovation should be focused on determining creative ways to reduce the environmental impacts of tourism and reducing costs of inputs to ensure continued profitability and viability. The focus should be on energy sources, utilisation and business practices. There is a definite need to determine the tourism industry's current innovation and technological adoption rates and to benchmark these against other industries.

## **Performance Measurement**

A focus of the industry workshop, which was not so apparent in the strategic planning documents, was a need for performance measurement tools to guide, monitor, evaluate and improve, destination and business management and planning. These tools should provide an indication of business and destination viability in order to:

- allow new businesses entering the industry to determine pre-feasibility and reduce the high rate of business attrition
- monitor and ensure ongoing sustainability and development of existing businesses
- identify businesses vulnerable to failure and provide support and practical advice to aid viability, particularly for small- and medium-sized enterprises.

There is a need to develop appropriate key performance indicators (KPIs), identify carrying capacities and undertake independent but centralised monitoring. Indeed, the industry representatives suggested that performance measurement data should be scientifically validated by STCRC as they are seen as a neutral agency and more transparent in their activities.

## **Sustainable Development and Triple Bottom Line**

Clarity and guidelines are required to define values underpinning appropriate and successful development. There is also a need to determine how success may be measured and monitored effectively. The industry workshops recommended a focus on sustainable development underpinned by triple bottom line values.

Workshop participants viewed the goal as developing a sustainable and viable industry but felt that there was a lack of metrics, indicators and best practice development models and guidelines that could support the sustainable development paradigm. For the sector as a whole there is a need to develop models which are forward looking, value based and based on a sustainable 'balanced scorecard' approach which includes environmental accounting in order to indicate tourism's role in Australia's overall development. It was recognised that industry behaviour needs to continue to change, implying that the models should be adaptable and dynamic. The priority should be on sustainable development that aims to improve standards of living and the robustness of the economy, guided by values pertaining to corporate social responsibility underpinned by the triple bottom line.

### **Risk Management, Adaption and Transformation**

Tourism is a naturally dynamic industry and despite numerous external shocks it has, to date, proven resilient; yet the strategic planning documents noted a need to increase risk management and strategic response (McLennan & Ruhanen, 2008). The workshops expanded on this to include enabling product adaption and strategic institutional and structural change (transformation).

The workshop participants' view of risk management was the development of strategies that manage transition and enable the industry to cope successfully with risk and change (i.e., climate change, terrorism, business and financial failures etc.). Workshop participants proposed developing tools that can gauge and manage risk and track key data variables, such as global economic and market performance and shocks, which may impact on the tourism system. Product adaptability was associated with developing the industry's capacity to respond to changes in market demand and its ability to make incremental adjustments to strategies like marketing, packaging and transport modes to deal with and respond to conditional fluctuations or impacts.

The representatives also recognised a need to develop a transformative industry that can undertake learning and structural adjustment to evolve to a sustainable tourism platform that can deal with future challenges. A transformation strategy is the deliberate adjustment of institutions that lead to structural change, often aiming to improve efficiency and maturity of a system (Loye & Eisler, 1987; Spitzer, 2007). To develop the industry's ability to strategically manage the change process it was recognised in the workshops that there is a need to undertake performance measurement and design models of change.

However the industry called for:

- clarity around what is required in order to transform the industry to allow environmental adaption and social and economic efficiency
- a national level strategy and action plans for destinations and businesses to facilitate their shift to the sustainable development platform
- measurement of regional and national level progress towards implementing sustainable development across the triple bottom line
- determination of limits of acceptable change, ethical values and how to manage and monitor the evolution of these values.

### **Business Events, Major Events and Festivals**

The review of the strategic planning documents identified both major events and business events as a key priority (McLennan & Ruhanen, 2008). The workshop participants particularly focused on the management and development of business events and highlighted the need to understand and measure the triple bottom line benefits of events generally, particularly how they impact on destinations.

During the workshops, discussions noted that the Business Event Council of Australia (BECA) had recently released a strategy for their sector and that this would need consideration in determining future research needs. Major and business events, as an industry issue, was ranked higher in importance by the strategic planning document review (McLennan & Ruhanen, 2008) compared to the industry workshops, which may be related to limited participation of event specialists at the workshops.

*Chapter 6*

## CONCLUSION

The Australian tourism industry is comprised of a series of highly competitive states/territories and destinations. The industry's key focus has been on product diversification and marketing Australia's many strengths; which has had a dilutive effect upon marketing efforts (McLennan & Ruhanen, 2008). This suggested a need to reassess and refine previous strategies to determine the most appropriate approach for the future.

Analysis of material stemming from four industry workshops held in Australia in late 2008 revealed that there has been an observable paradigmatic transformation in the minds of Australia's tourism industry leaders, with the emphasis shifting from destination marketing to destination management. In the years ahead, the industry is likely to be guided by a vision that seeks to develop coordinated best practice destinations with well defined roles and responsibilities aligned to a triple bottom line sustainable development platform and implemented by developing corporate social responsibility amongst tourism operators.

The industry workshops highlighted research as a key issue for the tourism industry. They recommended developing a national tourism research agenda to inform and assist the implementation of the National Long-term Tourism Strategy (NLTS). The development of a national research strategy to guide tourism research agencies was deemed necessary to ensure coordinated, relevant and outcome orientated research efforts. The industry's research needs are closely associated with gaining a reliable understanding of the long-term future. Indeed, it was inferred that the tourism planning process and research projections (mainly scenario based) should assess the triple bottom line impact of visitor growth and market development beyond the traditional ten year planning term, to 2050. This was seen as important to facilitate sustainable development strategies which tend to have goals and implications that extend across generations.

The national level broad themes identified by the industry representatives at the workshops were:

- applied research and modelling
- research management, dissemination and use
- consumer behaviour
- marketing
- internationally competitive, domestically cooperative
- destination management and planning
- policy
- leadership
- advocacy, engagement and communication with community and local government
- environmental issues i.e. climate change and land use
- access and aviation
- industry and business development
- investment
- innovation, product development and quality
- labour and skills development
- technology
- performance measurement
- sustainable development and triple bottom line
- risk management, adaption and transformation
- business events, major events and festivals.

The development of supply and demand models that can incorporate triple bottom line accounting is viewed as a key requirement for the tourism industry. This is reflected in the broader themes that emerge by grouping together the key issues and challenges. The broad themes reveal that the major issues and challenges for the tourism industry at the end of 2008 were: applied research and modelling; marketing; consumer behaviour; environmental issues; and, research management, dissemination and use, amongst others.

A main finding of the analysis of outcomes from the industry workshops was that the industry's focus has shifted from destination marketing toward a vision of leading edge destination management underpinned by

triple bottom line reporting and supported by robust research. Other notable changes in industry thinking include a shift from product development and diversification towards principles aimed at understanding community aspirations alongside tourism consumer needs and developing strong products to meet appropriate sources of demand. While industry thinking has transformed, implementing the vision will see the Australian tourism industry face new challenges. A core challenge identified by this study is how to close the knowledge gap that surrounds leading edge sustainable tourism development—the nexus of viable tourism businesses operating within sustainable destinations to achieve society’s economic, social and environmental goals.

**APPENDIX A: TOP RANKED SPECIFIC INDUSTRY ISSUES**

Rank	Specific Industry Issue	No. of Citations
1	Indicators & best practice destination models	33
2	Economic Impact Scenario Models of Tourism	29
3	Insights & modelling of future consumer behaviour & tourism market	24
4	Understanding the current tourism market & their needs	19
5	Understanding current consumer behaviour generally	19
6	Tracking global trends in consumer behaviour & economy	16
7	Labour issues	15
8	Aviation issues	15
9	Destination / business management, planning, monitoring & evaluation	14
10	Triple bottom line	13
11	Other access issues	13
12	Innovation strategy & leading edge product development	12
13	Industry education	12
14	Competition verse cooperation	12
15	Tools for monitoring industry & business performance	12
16	Land use assessment	10
17	Monitoring, tracking & managing the 'carbon footprint'	10
18	Increased communication across the industry	10
19	Yield vs. volume – definition of growth	10
20	Risk management & strategic response	10
21	Increase leadership & industry's ability to self-manage	10



**APPENDIX B: NATIONAL LEVEL KEY STRATEGIC THEMES –  
ISSUES COMBINED AND GROUPED**

Rank	Broad Key Themes	No. of Citations
1	Applied research & modelling	90
2	Marketing	63
3	Consumer behaviour	61
4	Environmental Issues i.e. Climate change & Land use	55
5	Research management, dissemination & use	50
6	Innovation, product development & quality	50
7	Advocacy, Engagement & Communication with community & local government	50
8	Destination management & planning	44
9	Labour & skills development	44
10	Industry & business development	43
11	Sustainable development & triple bottom line	39
12	Access & aviation	28
13	Technology	28
14	Internationally competitive, domestically cooperative	28
15	Performance measurement	26
16	Risk management, adaption & transformation	25
17	Investment	21
18	Policy	21
19	Leadership	16
20	Major events, business events & festivals	9

## APPENDIX C: NATIONAL LEVEL KEY STRATEGIC THEMES BY SPECIFIC ISSUES

Broad Key Issue	Specific Issue	No. of Citations
Applied research & modelling	Indicators & best practice destination models	33
	Economic impact scenario model of tourism	29
	Socio-economic/community modelling	8
	Yield & impact modelling i.e. IPAT & TSA	8
	Case studies & modelling	6
	Supply & demand research & scenario modelling	5
	Cost benefit analysis	2
	Regional & local area data modelling	2
	<b>Total applied research &amp; modelling</b>	<b>95</b>
Marketing	Understand the current market & its needs i.e. Market research	19
	Possible declining interest in national parks & trend towards adventure tourism	9
	Reassess current product & develop pricing metrics	7
	Marketing issues & effectiveness	6
	Media	5
	New markets	4
	Market performance & optimisation	4
	Avoid green wash – market response to climate change	3
	Ensure correct market positioning – marketing first principles	3
	Indigenous tourism	2
<b>Total marketing</b>	<b>63</b>	
Consumer behaviour	Insights & modelling of future consumer behaviour & tourism market	24
	Understanding current consumer behaviour	19
	Trend tracking	16
	Likely external impacts on consumer behaviour	2
<b>Total consumer behaviour</b>	<b>61</b>	
Environmental issues	Land use assessment	10
	Monitoring, tracking & managing the ‘carbon footprint’	10
	Land use – protecting assets	6
	Measuring environmental management & tourism impacts	5
	Climate change as an issue for the industry	5
	Carbon offsetting & pricing elasticity	4
	Mapping & scenario modelling of climate change impacts	3
	Strategic guidelines & advice on to ensure credible environmental practices	3
	Tourism industry change to facilitate environmental resilience i.e. aviation	3
	Supply side impact analysis	2
	Green accreditations	2
<b>Total environmental issues</b>	<b>55</b>	
Research management, dissemination & use	Data availability, management & use	9
	Centralised knowledge database	7
	Regional & local level data	6
	Changing & new distribution channels	6
	Turn current information into knowledge	5
	Benchmarking of destinations with national consistency	4
	Longitudinal consumer research studies	4
	Mapping	3
	Research needs assessment	3
	Tactical & strategic research	3

**STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008**

Broad Key Issue	Specific Issue	No. of Citations
	<b>Total research management, dissemination &amp; use</b>	<b>50</b>
Innovation, product development & quality	Innovation strategy & leading edge product development	12
	Matching product to market demand	7
	Ensuring quality standards & accreditations	7
	Product development	6
	Entrepreneurship	4
	Product demand	3
	Product requirements	3
	Adventure tourism	2
	Destination differentiation	2
		<b>Total innovation, product development &amp; quality</b>
Advocacy, engagement & communication with community and local government	Increased communication across the industry	10
	Tourism advocacy & community value	8
	Strong single message & industry advocacy	6
	Local government engagement	6
	Community engagement	5
	Cultural benefits & community development from tourism	5
	Indigenous engagement	4
	Corporate social responsibility	4
	Industry engagement	2
		<b>Total advocacy, engagement &amp; communication</b>
Destination management & planning	Industry education	12
	Tourism planning integrated in local/state government policy	4
	Visitor Management & Planning	4
	Long-term industry agreed national vision & strategy	3
	Address barriers & constraints	3
	Destination & Place management	3
	Holistic approach	2
	Infrastructure development	2
	Local level planning & management	2
	Product development impacts	2
	Strategic implementation	2
	Strategic Management	2
		<b>Total destination management &amp; planning</b>
Labour & skills development	Labour issues	15
	Investigate potential labour force	6
	Workforce attraction & development	6
	Workforce monitoring	6
	Skills development	5
	Better working conditions, career paths & remunerations	4
	Skills audit & comparison of destination managers	2
	<b>Total labour &amp; skills development</b>	<b>44</b>
Industry & business development	Industry development workshops	5
	Increase structural efficiency of the industry	5
	Changing industry behaviour & learning	4
	Viable businesses & ability to cope with change	4
	Accreditation	3
	Industry support	3
	Increase opportunities	2
	Industry 'ownership'	2
	Industry assistance & incentives	2
	Measuring & communicating industry outcomes	2
	Future driven industry with succession planning	2
	Holistic & strategic management of outcomes in fragmented industry	2
	<b>Total industry &amp; business development</b>	<b>43</b>
Sustainable development &	Triple bottom line – what is the new industry structure?	13

**STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008**

Broad Key Issue	Specific Issue	No. of Citations
	Yield versus volume – definition of growth	10
	Sustainable & viable industry	8
	Balanced scorecard approach	6
	Sustainable development model & guidelines	2
	<b>Total sustainable development &amp; triple bottom line</b>	<b>39</b>
Access & aviation	Aviation issues	15
	Other access issues	13
	<b>Total access &amp; aviation</b>	<b>28</b>
Technology	Understand impacts & use of technology i.e. virtual, digital	7
	Use of technology in branding	7
	Technologically advanced industry	6
	Use of technology to create knowledge & educate industry	4
	<b>Total technology</b>	<b>28</b>
Internationally competitive, domestically cooperative	Competition versus cooperation	12
	Cooperation & coordination	9
	Achieving competitive advantages	7
	<b>Total internationally competitive, domestically cooperative</b>	<b>28</b>
Performance measurement	Destination/business management, planning, monitoring & evaluation	14
	Tools for monitoring industry & business performance	12
	<b>Total performance measurement</b>	<b>26</b>
Risk management, adaption and transformation	Risk management & strategic response	10
	Strategic management of change	6
	Product adaptability	4
	Measuring & modelling change	4
	Justification for supporting ecological adaption	1
	<b>Total risk management, adaption &amp; transformation</b>	<b>25</b>
Investment	Return on investment	6
	Investment – optimal levels & limitations	6
	Increasing investment	3
	Increasing viability of businesses to attract investment	3
	Long-term investment & user pays i.e. Infrastructure	3
	<b>Total investment</b>	<b>21</b>
Policy	Need flexible policy that enables & supports industry	7
	Carbon offset programs	3
	Identify policy failures	2
	Taxation	2
	Best practice policy frameworks	2
	<b>Total policy</b>	<b>21</b>
Leadership	Increase leadership & industry's capacity to self manage	10
	Increase tourism leadership skills through development & better working conditions	7
	<b>Total leadership</b>	<b>16</b>
Major events, business events & festivals	Management & measurement of events	4
	Triple bottom line impacts of events	3
	Develop events	2
	<b>Total major events, business events &amp; festivals</b>	<b>9</b>

*Note:* Only those issues stated more than once are presented in this table, although for ranking the broad and individual issues they were included.

**APPENDIX D: SYDNEY WORKSHOP**

**Location:** Sydney Marriott Hotel, 36 College St, Sydney

**Date:** Monday 3 November 2008, 8.45am – 4.45pm

**Facilitator:** Mr Stewart Moore, CEO, EC3 Global

**Attendees:**

<b>Title</b>	<b>Full Name</b>	<b>Job Title</b>	<b>Company</b>
Ms	Liz Crowley	General Manager Operations	AAT Kings NSW
Mr	Justin Lalor	Research & Development Manager	Australian Capital Tourism
Ms	Jennifer Woodbridge	Manager, Research & Industry Development	Australian Tourism Export Council
Ms	Elizabeth Rich	Executive Officer	Business Events Council Australia
Mr	Alex Cockinos	Tourism Division	DRET
Mr	Robert van den Honert	Manager, Strategy & Research	Events NSW
Mr	Bill Wright	Chairman	ID Australia
Ms	Wendy Hills	Manager – Australian Experiences Team	Indigenous Business Australia
Ms	Jenny Lambert	Chief Executive Officer	National Tourism Alliance
Ms	Erin Morris	Research Policy & Project Officer	National Tourism Alliance
Mr	Chris Flynn	Regional Director - Pacific	Pacific Asia Travel Association
Mr	Bruce Leaver	First Assistant Secretary	Parks Australia
Mr	Simon Pogmore	Manager Tourism Development	Qantas Airways
Mr	Simon Bernardi	General Manager	Tour East Australia (Qantas)
Mr	David Holderness	Manager, Consumer & Market Insights	Tourism Australia
Mr	Peter Valerio	Consultant	Tourism Industry Council NSW
Ms	Eileen Gilliland	Manager Regional Markets	Tourism NSW
Mr	Colin McLean	Manager Regional Markets	Tourism NSW
Mr	Aaron Spadaro	Strategy & Planning Coordinator	Tourism NSW
Ms	Angela Collard	GM Strategic Services & Business Tourism	Tourism NT
Mr	Justin Vaughan	Research Manager	Tourism NT
Mr	Euan Robertson	National Manager, Research	TTF Australia
Ms	Evelyn Tricardos	Research & Analysis Officer	TTF Australia
Mr	Charles Carlow	Director	Wilderness Australia
Mr	Ian Kennedy	Principal	Ian Kennedy Associates

**Attendees from host organisations:**

<b>Title</b>	<b>Full Name</b>	<b>Job Title</b>	<b>Company</b>
Mr	Ian Kean	CEO	STCRC
Prof	David Simmons	Director of Research	STCRC
Mr	John Fitzgerald	COO	STCRC
Ms	Nell Anderson	GM Strategy & Research	Tourism Australia
Mr	Vic Dobos	GM Tourism Research Australia	Tourism Australia

**STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008**

<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
Access and aviation	Aviation	Aviation
	Aviation	Aviation
	Aviation	Aviation futures
	Aviation	Aviation impacts
	Aviation	Aviation initiatives 'STCRC seen as neutral party'
	Other Access	Quality access to destinations
Advocacy	Advocacy of tourism	Legacy (CSR) value of tourism
	Advocacy of tourism	Strong perception of tourism
Balanced scorecard approach	Balance scorecard	The Balanced scorecard
	Balance scorecard	Balance Scorecard model of yield
	Balance scorecard	Growing regions not necessarily aligned with STOs & NTOs
	Balance scorecard	The 'balanced scorecard' measurement of tourism
	Balance scorecard	The 'Balanced Scored' approach to sustainability (yield measurement) – economics, environment (including resource use), social / cultural
Business events	Develop events	Business events
	TBL impacts of events	Business events & adaptation
		Business events implications
	Management & measurement of events	Consider national business events Strategy & potential research – review business events strategy
	Management & measurement of events	Corporate policy & business events implications / site selection – CSR
Businesses	Assessment of business establishment costs & government support	Business Establishment costs in regional/rural areas & incentives/ assistance compared to other industries
	Improving SMEs' ability to change & remain viable	Improving resilience & adaptability of SM(T)Es
	Industry focus	Industry focus
	Viable businesses	Operator stability – greater investor confidence
	Educate the industry	Operators better understand key drivers
	Improving SMEs' ability to change & remain viable	SME adaptability

## STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008

Broad Theme	Specific Issue	Original Label
Climate change	Tracking the 'carbon footprint'	Carbon foot printing tracking
	Carbon neutral events	Carbon neutral (lite) events & business events case studies
	Carbon offset pricing elasticity	Carbon offset benchmarking models/comparisons
	Strategic management of climate change	Climate change framework/blueprint
	What is expected of the industry & strategic responses	Mitigations strategies for industry
	Mapping & scenario modelling of climate change	On ground climate mapping, particularly down to regional level
	Tourism's ability to change an opportunity to help environmental resilience	Tourism as climate change opportunity – comparison to other industry
Change the tourism product to deal with climate change i.e. aviation	Transport & product adaptation to climate change	
<b>Communication</b>	<b>Increased communication</b>	<b>Communication</b>
Community	Cultural benefits & community development from tourism	Consumer/community needs (Indigenous)
	Corporate social responsibility	CSR needs
	Competition	Dilutive impact of competing states in current environment
	Advocacy & community value	Government recognises & values tourism
	Advocacy & community value	Hot Buttons: how tourism provides solutions to government/community issues & planning – demonstrating tourism benefits in relation to issues i.e. urban drift, water security, Indigenous issues, land use conflict, mining, manufacturing
Advocacy & community value	Industry profile – awareness & understanding	
Advocacy & community value	Positive contribution of visitors, e.g. 'voluntourism'	
Advocacy & community value	Tourism delivering value	
<b>Destination attributes</b>		<b>Core competencies of destinations – alignment, mainstream</b>
Destination management and planning	Address constraints	Role of accommodation constraints – inbound tourism – exchange rates
	Cooperation & coordination	Coordination & linkages across destination – agencies & private sector
	Industry education	Education
	Holistic approach	Holistic approach
	Industry education	Industry education
	Industry education	Industry personnel training & knowledge on Climate Change issues & initiatives
	Industry education	Info to industry?
	Infrastructure development	Infrastructure planning & management
	Place Management	Place management – destinations
	Product development	Products/experiences held together by destinations
	Strong single message & advocacy	Strong story – 'safe'
	Strong single message & advocacy	Strong story or tourism contribution
	Increase tourism leadership skills	Successful destination/tourism managers – identify business skills
Tourism planning integrated in local & state government	Tourism planning integrated to Government – local/state planning & incentives	
Development requirements	Understanding development needs	

**STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008**

<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
Economic	Avoid green wash Branding Avoid green wash	Avoiding green wash Natural areas & branding Real green not just perception of green (not green wash)
Economic modelling	Impact scenario model of tourism (TBL) Impact scenario model of tourism (TBL) Impact scenario model of tourism (TBL)	Effects of global economic crisis Impact of global economic crisis/other shocks Modelling impacts on visitation from response to Climate Change by consumers
<b>Engagement</b>	<b>Engagement</b>	<b>Strong community buy in – ‘pride’</b>
Environment	Green accreditations Measuring environmental management & tourism impacts (positive & negative) Measuring environmental management & tourism impacts (positive & negative) Protecting natural environments Land use – legal issues	Wholesale accreditation – Green Business Environmental impacts – perceptions/outcomes on distribution, spending perceptions vs. reality Impact on alpine regions/parks Protecting natural amenity, including visual landscape Understanding legal issues for land use & resource use
Future traveller	Future visitor Future visitor	Future markets e.g. China/India Generation Y + changes in travel behaviour
Industry development	STCRC seen as neutral party	Industry initiatives ‘STCRC seen as neutral party’
Industry transformation to allow for adaption	Strategic management Measuring change Product adaptability Product adaptability	Adaptation actions for destinations & SMEs Measure national/regional progress of adaptation – e.g. reduced energy, design Transport mode analysis, impacts & product adaptation strategies Travel package adaptation → new travel products
Innovation and product development	Innovation strategy & product development Innovation strategy & product development	Innovation – new & adaptive product; adaptive destinations Product development – what is the opportunity to deliver new products?
Investment	Return on investment Return on investment Return on investment	Investment – ROI ROI: Tourism Investment (Accommodation) Tourism investment & ROI
Labour and skills development	Skills audit of destination managers – compare to other industry managers Labour issues Skills & leadership development Workforce monitoring Workforce attraction / development Workforce monitoring Workforce attraction / development Skills development Providing opportunities Skills audit of destination managers – compare to other industry managers Skills development Labour issues Labour issues	Analysis of NTO, STO, RTO skills & conditions compared to other sectors Barriers/costs, particularly regional Business skills Cross referencing employment databases How SMEs recruit Idea/example – South Pacific workers scheme Incentives compared to other industries Incorporating tourism into all levels of education Indigenous opportunities Industry leadership identification: National, State, Local Information – Changing vocational expectations Labour market challenges Labour shortage (monitoring vacancies, clarifying shortages)



## STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008

	Labour issues	Labour supply issues – skills / availability, barriers / costs
	Workforce monitoring	Modelling employee needs & motivations (How operators package)
	Workforce monitoring	Modelling employees needs & motivations (package for operators) – knowledge diffusion
	Labour issues	Regional access (right people, right place, right time)
	Workforce monitoring	Review other labour market models – South Pacific workers scheme
	Skills & leadership development	Skills for destination management
	Skills development	Skills/availability
	Workforce attraction / development	Tourism businesses & employment
	Workforce monitoring	Tracking tourism graduate employment (overtime)
	Workforce attraction / development	Vocation expectations & regional needs – tracking graduate employment (longitudinal)
	Defining success	What does success look like? (consider international best practice in facilitating investment) look towards historical success?
	Skills development	Workforce skills/training
Land use	Land use	Land use management & implications
	Land use	Strategic analysis of land use for tourism development & comparison to other use
	Land use	Tourism vs. recreation use (visitor type) – conflicts of use
Leadership	Leadership	Benchmark industry leadership progress/best practice
	Leadership	Successful destination managers
Market /Marketing	Branding	Brand diagnostic tools
	Market needs	Cultural needs of different markets e.g. Germans
	Branding	Destination branding of natural areas (refer Wet Tropics)
	Branding	Destination image/brand
	Distribution channels – research	Distribution patterns (transport modes)
	Current market	Domestic & international considerations
	Branding	Experience delivery/destination branding
	Indigenous tourism	Indigenous experience demand
	Market failure	Market failure
	Current market	Visitation profile market – what does the visitor look like? Social drivers & wealth, domestic, international, future proof
	Marketing	Destination marketing & evaluation
	Media	Influence of media – TV, Film on consumers (shelf life)
	Media	Media consumption
	Media	Media consumption / placement
	Nature based tourism trends	National parks
	New markets	New markets
	New markets	Niche travel – special interest opportunities / new markets
	Pricing metrics	Pricing the experience
	Positioning	Product placement – portfolio of product & positioning
	Marketing first principles	Understanding tourism is consumer to product not product to consumer

**STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008**

<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
Modelling	Best practice models i.e. for destination development & innovation	Clear roles & responsibilities – best practice
	Best practice models i.e. for destination development & innovation	Comparing planning, construction, operating models with other destinations
	Demand research & scenario modelling	Demand scenario modelling on forecast variations – what are supply
	Best practice models	Design/construction best practice
	Best practice models	Destination management model/template
	Best practice models	Destination management templates / models
	Economic Modelling	Economic modelling
	Best practice models i.e. for destination development & innovation	Planning tools for destinations
	Yield modelling	Sustainable yield modelling
	Tourism Satellite Accounts	TSA Satellite Accounts
	Best practice models i.e. for destination development & innovation	Urban tourism – needs of urban destinations, trends for city places
Use of IPAT	Use of tools such as IPAT in measuring success	
	Metrics models	What are the metrics/models?
Performance measurement	Destination & business management, planning, monitoring, performance evaluation	Data validation by STCRC
	Destination & business management, planning, monitoring, performance evaluation	Destination management assessment tools
	Destination & business management, planning, monitoring, performance evaluation	Destination modelling & evaluation
	Destination & business management, planning, monitoring, performance evaluation	Destination planning/monitoring/evaluation
	Destination & business management, planning, monitoring, performance evaluation	KPI measurement of success
	Destination & business management, planning, monitoring, performance evaluation	Scientific validation of data & performance
	Destination & business management, planning, monitoring, performance evaluation	Scientific validation of data performance
Policy	Local government impact on tourism	Impact of larger local governments on tourism
	Legal basis of tourism planning – trigger environmental protection agency	Legal basis of tourism planning – trigger EPA
	offset programs	Offset programs
	Taxation	Taxation barriers & incentives in regional Australia
	Taxation	Taxation implications & elasticity
Product development	Matching market demand & supply	Experience expectation & value
	Matching market demand & supply	Product development matching – message & application, gaps & management
	Product development	Product experiences (including infrastructure & amenity)
	Product requirements	Product needs
	Matching market demand & supply	Value: image vs. experience/delivery

**STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008**

<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
Quality	Meeting expectations Quality standards & accreditation Quality standards & accreditation Quality standards & accreditation	Experience expectations & value Quality benchmarking (e.g. Qualmark Green) Quality standards / accreditation models Quality standards & national accreditation modelling/evaluation
Research	Brand tracking Understanding consumer behaviour Community modelling Benchmarking  Understanding consumer behaviour Understanding consumer behaviour Understanding consumer behaviour Understanding consumer behaviour  Understanding consumer behaviour Understanding consumer behaviour  Cost benefit analysis Data availability, management & use Turn current information into knowledge Economic modelling Understanding consumer behaviour  Community modelling Supply & demand research  Understanding consumer behaviour  Local level data Local level data Understanding consumer behaviour Data availability, management & use  Longitudinal studies Longitudinal studies Mapping Mapping Market research Understanding consumer behaviour Benchmarking Centralised knowledge database  Distribution channels – research  Local level data  Land use modelling Centralised knowledge database  Understanding consumer behaviour  Understanding consumer behaviour Understanding consumer behaviour	Brand diagnostics Changing consumer needs Community well being modelling Competitive destination benchmarking (Singapore) Consumer behaviour & insights Consumer behaviour & perceptions Consumer Insights – future behaviour Consumer needs & demand – longitudinal research on behaviour Consumer panels/groups Consumer perceptions & behaviour – tipping points for change Cost/benefit analysis Data availability & management Decipher  Economic modelling External/environmental impacts on consumer behaviour Host community surveying How demand responds to price/supply considerations How visitor (pax) volumes respond to changes in economic activity & wealth Improved local data – planning/destinations Improved local data sets (cost effective) Industry trends & impacts Knowledge diffusion & industry uptake of strategic research & tools – partnership implications Longitudinal research Longitudinal study Mapping Mapping impact at regional/local levels New structures (market research) Ongoing consumer research Product benchmarking Register library linkages (ATRI outlook forum) Research distribution communication – new ways Stronger local data required – NVS & IVS not robust at local level, IPAT implementation Templates – Greenfield modelling (land use) Topic areas, central pool knowledge from industry ATEC etc Tracking consumer behaviour & demand over time Tracking consumer trends – time series Tracking demand changes

**STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008**

<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
Sustainable development	Sustainable development Yield vs. volume – defining growth Yield vs. volume –defining growth	Sustainability Volume vs. yield Volume vs. yield (India, China)
Technology	Distribution channels – research Industry relevant & useable strategic tools  Impacts of technology  Impacts of technology Technologically advanced industry Virtual technology	Distribution channels (adaption) Knowledge diffusion & industry uptake of strategic research tools industry relevant tools & partnership approach to diffusion Technology impacts & opportunities on industry Technology impacts on industry technology take up etc. Virtual replacement of travel experiences (e.g. meetings, Virtual Business Events)
Triple bottom line	Triple bottom line Triple bottom line  Triple bottom line	Triple bottom line Triple bottom line changing industry behaviour – who/what will they look like? Value based decisions
Visitor management	Visitor friendly Visitor management	Visitor friendly Visitor management
Communication	Increased communication	Communication

## APPENDIX E: MELBOURNE WORKSHOP

**Location:** Karstens at CQ Melbourne

**Date:** Monday 24 November 2008, 8.45am – 4.45pm

**Facilitator:** Mr Stewart Moore, CEO, EC3 Global

**Attendees:**

<b>Title</b>	<b>Full Name</b>		<b>Job Title</b>	<b>Company</b>
Mr	Wayne	Walker	GM Customer Experience	APT Group
Ms	Helen	Hardwick	Destination Management Program Manager	City of Melbourne
Ms	Penny	Wilson	Tourism Project Coordinator	City of Melbourne
Dr	Kevin	Hennessy	Team Member	CSIRO Climate Impact & Risk Group
Mr	Chris	Buckingham	Chief Executive Officer	Destination Melbourne
Ms	Tula	Harris	Customer Service & Business Improvement Manager	Federation Square Pty Ltd
Mr	Terry	Hickey	Deputy Exec Director	Geelong Otway Tourism
Mr	Peter	Olah	National Affairs Manager	Hotel Motel & Accommodation Association
Ms	Dianne	Smith	Manager, Tourism Partnerships	Parks Victoria
Ms	Pauline	Coates	Business Manager Research	South Australia Tourism Commission
Mr	Mark	Poll	Acting Head of Research	Tourism Tasmania
Ms	Denise	Ulbrick	A/Research Manager, Strategy & Policy	Tourism Victoria
Mr	Wayne	Kayler- Thomson	Chief Executive Officer	Victorian Employers' Chamber of Commerce & Industry
Ms	Jodie	Wickham	Senior Policy Adviser	Victorian Employers' Chamber of Commerce & Industry
Mrs.	Jennifer	Hutchison	Chief Executive Officer	Yarra Ranges Regional Marketing Ltd

**Attendees from host organisations:**

<b>Title</b>	<b>Full Name</b>		<b>Job Title</b>	<b>Company</b>
Mr	Ian	Kean	CEO	STCRC
Mr	John	Fitzgerald	COO	STCRC
Ms	Nell	Anderson	GM Strategy & Research	Tourism Australia
Mr	Vic	Dobos	GM Tourism Research Australia	Tourism Australia

**STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008**

<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
Access and aviation	Other access	Access
	Other access	Effective transport networks – dispersal addressed
	Other access	Public transport deficiencies – dispersal
	Other access	Quality access – land/sea/air
Business events	Develop events	Leisure experiences accompanying meetings
Climate change	Strategic management of 'footprint'	Footprint mitigation
	Credible practices for mitigation	What is green wash/white wash? Carbon trading
	Climate change	Climate change
	Climate change	Climate change – maps
	Climate change	Climate change mapping – destinations / agriculture
	Mapping & scenario modelling of climate change	Climate change mapping & scenario models
	Strategic management of change (environmental & industry)	Park (PA) management & climate change e.g. increasing bush fires
Tracking the 'carbon footprint'	STCRC carbon footprint & risk analysis	
Communication	Increased communication	Communication – agency coordination, clearing houses etc
	Increased communication	Communication/education linkages to industry (SMEs)
	Increased communication	Customise industry communication tools around learning styles
	Increased communication	Information exchange – pathways, clearing house, templates
Community	Cultural benefits & community development from tourism	Community development
	Corporate social responsibility	CSR approach not just carbon trading/offsets
	Corporate social responsibility	CSR guide to broader consumer behaviour
Competition vs. cooperation	Competition	Globally competitive
	Competition	Competitive advantage – tracking point of difference
	Competition	Competitive industry – higher quality product & experiences
Destination attributes	Address constraints	Planning constraints addressed
	Address constraints	Town planning constraints/impediments
Destination management and planning	Infrastructure development	Infrastructure
	Tourism planning integrated in local & state government	Integrated planning
	Local level planning & management	Management
	Local level planning & management	Town/regional
	Industry education	Workshops
	Cooperation & coordination	Agency coordination/info sharing e.g. tourism & parks
	Strategic management	Confident-transparent-open
	Strong single message & advocacy	Consistent messages
	Cooperation & coordination	Coordination
	Strategic implementation	Implementation
	Cooperation & coordination	Lack of agency coordination to engage business development
	Long-term industry agreed national vision & strategy	Long-term agreed industry vision
	Long-term industry agreed national vision & strategy	National tourism strategy
	Strong single message & advocacy	One message
	Place management	Place management X2
Climate change	What are tipping points for Australia & how we communicate progress to market?	

## STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008

Broad Theme	Specific Issue	Original Label
Economic modelling	Impact scenario model of tourism (TBL)	Climate change impact on industry costs & profitability
	Impact scenario model of tourism (TBL)	Economic modelling – transport impact & cost (TBL)
	Impact scenario model of tourism (TBL)	ETS implications – economic models
	Impact scenario model of tourism (TBL)	Impact assessment
	Impact scenario model of tourism (TBL)	Managing impacts
	Impact scenario model of tourism (TBL)	STCRC – assessing tourism impacts e.g. alpine/coastal impacts
Engagement	Engagement	Genuine community engagement
	Engagement	Community ‘buy in’ engagement model
	Engagement	Community engagement
	Engagement	Local government & communities – tourism involvement in sustainability
	Engagement	Local government coordination – pathways, maps, signage
	Engagement	Local government engagement
Environmental	Measuring environmental management & tourism impacts (positive & negative)	Measuring environmental management & tourism benefit
	Supply & demand dynamics	Supply & demand dynamics
	Supply side analysis	Supply side delivery
Future traveller	Virtual technology – replacement of tourism	Future experience replacement (virtual)
	Future visitor	Future needs
	Future visitor	Understand the visitor 2020 & beyond (2050) – domestic & international
Industry development	Changing industry behaviour	Adaptation uptake
	Industry assistance	Assistance
	Case studies & modelling	Case studies
	Changing industry behaviour	Changing industry behaviour
	Industry support	Effective organisation support
	Distribution channels – research	How consumed/disturbed?
	Efficient industry structure	How do we structure industry?
	Strategic management of outcomes in fragmented industry structure	How to achieve with fragmented industry structures?
	Industry support	Industry support (enabling)
	Roles & responsibilities	Roles & responsibilities
	Industry support	Support mechanisms
	Increase structural efficiency of industry	Effective tourism structure
	Understand & mitigate climate change	Helping industry understand/embrace climate change
	Industry development workshops	How businesses access industry development programs
	Industry learning	How do other industries learn?
	Industry incentives	Incentives for industry
	Increasing industry capacity to self manage	Industry capacity to self manage (market failure addressed)
	Industry 'ownership'	Industry driven plan (supported by Government not the other way around) – strong industry leadership
	Industry / government partnerships	Industry need for partnerships with government
	Industry 'ownership'	Industry ownership – ‘buy in’
Industry development	Organisation structure support & clarity	

**STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008**

<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
	Holistic management	Part of holistic management of regions/destinations
	Increase structural efficiency of industry	Structural efficiency of industry
Industry transformation to allow for adaptation	Strategic management Strategic management Strategic management	TBL & industry response Adaptation – pathways Management/adaptation
Innovation	Entrepreneurship Entrepreneurship	Entrepreneurship impacts Ownership-management-entrepreneurship
Innovation and product development	Innovation strategy & product development Innovation strategy & product development Innovation strategy & product development Innovation strategy & product development	Innovation strategy New product offerings Opportunities product (communication guidelines) What are the opportunities?
Investment	Investment limitations Investment enabling Investment limitations Return on investment  Investment limitations Investment limitations Increasing investment	Lack of capital Framework process to enable investment Impediments to investing Investment – ROI realised – investment enabling not constraint  Investment impediment – access – aviation Investment limitations Investment /development
Labour and skills development	Labour issues Labour issues Potential labour force Skills & leadership development Potential labour force Potential labour force Labour issues Potential labour force Labour issues Labour issues Potential labour force Labour issues Labour issues Labour issues Labour issues Skills & leadership development	Capacity Career path development Case studies Management skills variance Mature age Migrant Reducing capacity/operations of business Seasonal/complimentary destinations Seasonality Skilled & unskilled Employment options Housing affordability – workforce Labour issues Regional support – employment Skilled industry
Land use	Land use Protecting assets Land use	Land use (state, local, regional) A national focus – national landscapes model Land use policy planning
Leadership	Leadership	Leadership
Market / Marketing	Current market Current market  Current market Current market Business tourism Market needs Market needs  Market needs  Marketing  Media Media Pricing metrics	Baby boomer (next 20 years) China vs. India needs (different needs & market segments) Generation X & Y Market beyond 20 years Business events Market needs, demand & supply Market needs/expectations & differentials relating to sustainability issues Visitor expectations/consumption needs (holiday seen as indulgent resulting in high consumption) How we engage markets differently – not just cost? Communication / media Communication/media consumption Metrics/pricing



## STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008

Broad Theme	Specific Issue	Original Label
	Pricing metrics	Price sensitivity (vs. experience) \$AUD
Modelling	Best practice models i.e. for destination development & innovation	Best practice (models)
	Emissions trading scheme economic model	ETS implications – economic modelling
	Policy support framework	Policy support framework
	Scenario modelling	Scenario modelling
	Best practice models	Sustainable practices – global best practice – tourism as a winner
	Best practice models	Best practice management e.g. Scotland - first impressions management
	Best practice models	Comparison of planning schemes – tourism precinct planning/nodes
	Best practice models	Destination development planning best practice
	Best practice models	Destination diagnostics – template
	Best practice models	Destination management models – diagnostic tools
	Best practice models	Destination models (best practice)
	Best practice models	Global best practice (lack of info on international product & tourism development trends)
	Best practice models	Innovation / best practice
	Local area data modelling	Local area data modelling & communication
	Best practice models i.e. for destination development & innovation	Planning/guidelines
	Best practice models i.e. for destination development & innovation	Templates
Performance Measurement	Tools for monitoring industry performance	Business churn
	Tools for monitoring industry performance	Business churn – causes & impacts
	Tools for monitoring industry performance	Health check tools
	Destination & business management, planning, monitoring, performance evaluation	Metrics required to model success & progress over time in regions (must have data)
	Tools for monitoring industry performance	Small business burn & churn
Policy	Will consumers pay for carbon offsets?	Consumers – will they pay?
	Flexible policy that enables & supports industry	Government recognise & support best practice sector
	Inflexible policy	Lack of zoning flexibility
	Policy failures	Legislative failure
	Regional development	Regional delivery
	Transparency	Transparency
	Policy driver	Driver of policy – attain share of policy voice
	Offset programs	Offsets
	Policy frameworks	Policy frameworks, guidelines & regional response
Product development	Matching market demand & supply	Delivering on the promise
	Destination differentiation	Different products & experiences
	Adventure tourism	Experiential
	Matching market demand & supply	Meeting market expectations (self actualisation experiences)
	Nature based tourism trends	Nature based is central
	Matching market demand & supply	Experience delivery (product)
	Product development	Infrastructure/product implications
	Leading edge product	Leading edge not bleeding edge
	Nature based tourism trends	Nature based tourism (enabling environment)
	High yield product	Need a higher yield product

**STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008**

<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
	Matching market demand & supply	Product offering vs. consumer demand
	Product service	Product service
	Destination differentiation	Understand 'point of difference' from rest of the world
Research	Assessing vulnerability	Assessment of vulnerability of tourism regions
	Benchmarking	Benchmarking
	Case studies & modelling	Case studies
	Understanding consumer behaviour	Consumer demand
	Understanding consumer behaviour	Consumers seek unique experiences
	Cost benefit analysis	Cost benefit analysis
	Data availability, management & use	Data sets & mapping
	Understanding consumer behaviour	Demographics – psychographics
	Understanding consumer behaviour	During visit
	Understanding consumer behaviour	F.I.T
	Understanding consumer behaviour	Greater flexibility
	Data availability, management & use	How does industry get the info (better connection of agencies)?
	Understanding consumer behaviour	How markets for Australia consume/experience tourism within (2 hours) of their homes?
	Understanding consumer behaviour	India middle class
	Understanding consumer behaviour	Pre-visit
	Turn current information into knowledge	Re-interpret existing data & support (SMEs) for tourism
	Understanding consumer behaviour	Smaller groups
	Social economic modelling	Social impacts – wealth – health (Segmentation)
	Local level data	Survey methodology for regions
	Understanding consumer behaviour	Tracking markets (not just here & now)
	Understanding consumer behaviour	Visitor behaviour
	Understanding consumer behaviour	Young Australian
	Case studies & modelling	Case study applications
	Centralised knowledge database	Clearing house – info & data – S LGA, SME
	Centralised knowledge database	Clearing house of 'best practice' info
	Demand research & scenario modelling	Demand
	Economic modelling	Economic models
	Mapping	Map research
	Turn current information into knowledge	Mapping existing research (& packaging for industry) – how end user can apply?
	Market research	Market analysis research
	Consistent benchmarking across country	Metrics must be consistent national (understanding connotations)
	Centralised knowledge database	Need clearing house of info/data (LGA)
	Understanding consumer behaviour	Regional behaviour of international markets
	Regional modelling	Regional modelling – optimum supply capacity – case studies
	Social economic modelling	Social economic modelling – aggregation & consistent use
	Supply research	Supply
	Understanding consumer behaviour	Trend observations
	Understanding consumer behaviour	Using data to track trends
	Understanding consumer behaviour	Visitor decision making process
Risk Management	Risk management & strategic response	Transition strategies/risk management
	Risk management & strategic response	Managing risk successfully e.g. climate change, business, financial
	Risk management & strategic response	response

**STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008**

<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
Sustainable development	Sustainable response guidelines	Guidelines response
	Sustainable development & viability	Destinations & industry sustainability
Sustainable industry – viable industry	Sustainable industry	Profitable industry
	Sustainable industry	Sustainable industry
	Yield vs. volume – defining growth	Understand ‘true yield’ of industry – volume vs. yield.
	Sustainable model	What is a sustainable model?
	Technology	How-to kits
Technology	Distribution channels – research	Access to info – distribution
	Centralised knowledge database	Clearing houses/portals
	Branding	Design ‘brand’ lead
	Technologically advanced industry	Technology
	Technologically advanced industry	Technology savvy industry
	Transform to greater industry efficiency – consider best practice	Transform to greater industry efficiency (consider other industry cases)
	Triple bottom line	Triple bottom line
Triple bottom line	Triple bottom line	Planning linked to community (TBL)
	Triple bottom line	Destination management
	Triple bottom line	Structure/management model (TBL)
Visitor management	Visitor services effectiveness	Value of effectiveness of visitor services
	Visitor management	Visitor experience

## APPENDIX F: BRISBANE WORKSHOP

**Location:** Rydges Southbank Brisbane

**Date:** Tuesday 18 November 2008, 8.45am – 4.45pm

**Facilitator:** Mr Stewart Moore, CEO, EC3 Global

**Attendees:**

<b>Title</b>	<b>Full Name</b>	<b>Job Title</b>	<b>Company</b>
Mr	Wayne Clift	Managing Director	Beetswalkin (QLD) P/L
Mr	Mick Capelin	Director Rural Futures, Specialist & Infrastructure Planning	Dept of Infrastructure & Planning
Ms	Amanda Yeates	Director – Food Industry Development	Dept of Tourism, Regional Development & Industry
Mr	Stephen Gregg	Chief Executive Officer	Dreamworld
Ms	Anne Greentree	Visitor Services Manager	Environmental Protection Agency
Mr	Steve Holle	Director of Corporate Relations & Development	Gold Coast Tourism
Mr	Brad Nardi	Market Intelligence Coordinator	Gold Coast Tourism
Mr	Shane O'Reilly	Owner/Principal	O'Reilly's Guest House
Mr	Bill Tatchell	General Manager	Outback Queensland Tourism Authority
Ms	Kim Harrington	Business Development & Policy Manager	QTIC
Ms	Susan Murphy	QAL Marketing Analyst	Queensland Airports Limited
Ms	Isabelle Yates	Marketing Coordinator	Queensland Airports Limited
Mr	James Visser	Chief Executive Officer	Restaurant & Catering Queensland
Mr	John Sharpe	Owner/Principal	Riverlife
Mr	Kim Henshaw	Chief Operating Officer	Southern Downs Tourism Assoc
Mr	David Holderness	Manager, Consumer & Market Insights	Tourism Australia
Mr	Richard Gregor		Tourism Queensland
Ms	Jayne Jennings	Manager Industry Development, Destination Qld	Tourism Queensland
Mr	David Morgans	Director - Product Development	Tourism Queensland
Mr	Peter Doggett	International Marketing Manager	Warner Village Theme Park Group

**Attendees from host organisations:**

<b>Title</b>	<b>Full Name</b>	<b>Job Title</b>	<b>Company</b>
Prof	David Simmons	Director of Research	STCRC
Mr	John Fitzgerald	COO	STCRC
Ms	Nell Anderson	GM Strategy & Research	Tourism Australia

<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
Access and aviation	Other access	Access – LCC – impact, consumer dynamics, needs
	Other access	Access – understanding outcomes inform
	Other access	Access & trigger points for development of services – air, rail, road
	Other access	Access road/rail infrastructure
	Aviation	Aviation – tourism market growth (new opportunities, SE Asia) & residential catchment – trigger points for viability
	Aviation	Aviation – Understanding Low Cost Carrier model dynamics – Changes to source markets – Spending patterns of visitors – Trigger points for viability
	Aviation	Aviation access
	Other access	Impact on traditional drive destinations
	Other access	Impact on travel mode
	Aviation	LCC & consumer behaviour → impact on tourism destinations
	Aviation	LCC impact on travel mode & impact on traditional drive destinations
	Aviation	Low cost carrier (LCC) & consumer behaviour impact
	Aviation	Low cost carrier research
Other access	Transportation / access / price / what cost?	
Other access	Transportation integration	
Aviation	Understanding LCC model dynamic	
Business events	TBL impacts of events	Business events opportunity vs. leisure in Australia
	Management & measurement of events	Event management – Encore mark II
	Management & measurement of events	Festival & events tourism management – Encore mark II
Businesses	Viable businesses	Business viability if dependent on natural assets that could be impacted by climate change e.g. Wet Tropics, Great Barrier Reef
Climate change	Strategic management of change	Practical adaptation & mitigation
	Climate change information & advice	‘ Informed’ information – metrics, info advice
	Economic modelling of climate change	Economic modelling consumer tipping points – pricing
	What is expected of the industry & strategic responses	Green expectations & responses
	Monitoring carbon footprint	Carbon footprint – tourism vs. other industry
	Industry change due to climate change	Changes in the business environment arising from climate change
	Climate change	Climate change
	Carbon offset pricing elasticity	Elasticity on basis of carbon offsets
	Carbon offset pricing elasticity	Elasticity on basis of carbon offsets / pricing
Carbon offset pricing elasticity	Elasticity / carbon pricing	
Monitoring carbon footprint	Offsets – programs / analysis	
Communication	Increased communication	Communication
Community	Advocacy & community value	Community amenity supporting tourism
	Cultural benefits & community development from tourism	Community based tourism – stepping stones
	Cultural benefits & community development from tourism	Integrate community planning

**STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008**

<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
Competition vs. cooperation	Competition	Being outcompeted by Asia on quality
	Competition	Competitive environment advantage
	Competition	Consumer spending competition
	Competition	Consumer spending options competition
	Competition	Future tourist? – future scope of market need, different mindset, different purchase decisions
Competitive advantage	Competitive advantage	Competitive advantage for proven best practice – operators in protected areas?
	Competitive advantage	Competitive product – current & future (advantages) ‘template’
	Competitive advantage	Define & focus on product competitive advantage – pick the winners – define our product
	Competitive advantage	Define competitive advantage – how to protect beyond 2020?
	Competitive advantages	How planning environment supports – what is the competitive set & what gaps have we got to compete?
	Competitive advantage	How to protect competitive advantage beyond 2020?
	Competitive advantage	What is the global competitive set & what gaps have we got to fill to compete?
Destination management and planning	Tourism planning integrated in local & state government	Integrated planning mechanism/cross sector (place management) image/content
	Smaller regions struggling/declining	Decline in smaller accommodation in regions
	Industry education	Education & communication – improved extension & diffusion
	Product development impacts	New product influence & impacts – education, sport, events
	Cooperation & coordination	Competition vs. cooperation
	Cooperation & coordination	Cooperative structures (clusters) ‘ Diffusion network’
	Cooperation & coordination	Coordination
	Tourism planning integrated in local & state government	Destination development – integration & alignment, planning national parks, resource management \$
	Industry education	Education ‘continuing’ support
	Industry education	Education of industry support mechanisms – diffusion/extension of research
	Strategic implementation	Implementation
	Cooperation & coordination	Industry/regional collaboration – ‘competition vs. coepetition’
	Industry education	Learning, education & knowledge
	Long-term industry agreed national vision & strategy	National tourism strategy
Strong single message & advocacy	One message	
Industry education	Ongoing education of industry – support & mechanisms, diffusion & extension	
Quality product	Quality destinations – quality product – quality experience	
Cooperation & coordination	Regional collaboration	
Developing destination management capacity	Resources, knowledge, destination management capacity	
Industry education	SEQ regional plan example – what is a sustainable development e.g. accommodation outside of urban footprint	
Economic	Declining interest in national parks	Interest in national parks declining? Youth seeking experiences

## STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008

Broad Theme	Specific Issue	Original Label
Economic modelling	Impact scenario model of tourism (TBL)	Impact on tourism destinations & visitation patterns
	Impact scenario model of tourism (TBL)	Agriculture – higher inputs/costs
	Impact scenario model of tourism (TBL)	Cost vs. return – costs of not doing it
	Impact scenario model of tourism (TBL)	Economic impact significance public/private
	Impact scenario model of tourism (TBL)	Economic outcomes
	Impact scenario model of tourism (TBL)	Impact of regulatory changes on the sustainability of tourism operators & the actions businesses need to be taking)
	Impact scenario model of tourism (TBL)	Monitoring impact visitation to support management frameworks
	Impact scenario model of tourism (TBL)	Recognition of economic benefit of tourism
	Impact scenario model of tourism (TBL)	Regional impacts – models/management
	Impact scenario model of tourism (TBL)	Supply chain issues/impacts
Engagement	Engagement	Indigenous engagement & opportunities
	Engagement	Indigenous engagement
	Engagement	Indigenous engagement critical
	Engagement	Indigenous enterprise – expectations, engagement
	Engagement	Local government toolkit – extension? STCRC tools available for LGAs – extension strategy required
	Engagement	Local government toolkit (extensions)**
	Engagement	Local government toolkit – STCRC tools available for LGAs – extension strategy required
Environment	Green accreditations	Green expectations
	Measuring environmental management & tourism impacts (positive & negative)	Implication for national parks
	Trend towards adventure tourism	Pure nature (passive), more adventure (active) e.g. mountain biking?
Future traveller	Future visitor	The new global middle class
	Future visitor	What markets will look like 2020 & beyond
	Future visitor scenario modelling	Future visitor scenario modelling
	Future visitor	Different mindset
	Future visitor	Different purchase decisions
	Future visitor	What is the market opportunity in relation to major market development e.g. Asia, Dubai?
Industry development	Accreditation	Accreditation – alignment to other processes e.g. tourism awards (watching brief)
	Accreditation	Accreditation – For what value? – Needs to align to other industry processes/schemes e.g. tourism awards
	Accreditation	Accreditation business practice for what value
	Industry development	Extension
	Future driven industry	Future proof industry
	Gauging efficiency & effectiveness of tourism industry	How effective efficient is tourism?
	Regulation compliance	How to respond to regulation – compliance
	Industry development – sustainability	Industry development/sustainability

**STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008**

<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
	Industry development	Mainstream engagement of Indigenous people in tourism businesses – how, mentoring / other, pathways to success, global examples/ learning
	Increase opportunities	Opportunities need to be facilitated – cluster opportunities
Industry transformation to allow for adaptation	Justification for supporting ecological adaptation transformation models	‘Why’ perception vs. reality – why does industry need to adapt & mitigate? Adaptation models – 5 regions STCRC commenced
	Strategic management Product adaptability	Mitigation action / adaptation strategies Product adaptability – appeal in response to market change/conditions – what is the relative competitive demand of product?
	Product adaptability	Product adaptability – responding to market demand/change
Innovation	Entrepreneurship	Importance of (fostering) entrepreneurship in destination development
	Entrepreneurship	Importance of entrepreneurship in destination development – fostering
Investment	Increasing investment	Domestic vs. international investment decisions
	Return on investment Investment limitations Viable businesses Return on investment	Financial return – investment labour planning Investment limitations Profitable/successful businesses ROI for public agency resourcing management of assets
	Increasing investment User pays	Strong investment – asset management User pays opportunity
Labour and skills development	Labour issues Labour issues	Labour cost Labour force issues – availability of workers, skills shortages, pay/remuneration levels à employer attitudes, support of Indigenous entry
	Skills development Potential labour force	Labour/work skills Opportunity for Indigenous employment – assistance needed
	Skills & leadership development & better working conditions Workforce attraction / development	Skills, people, payment levels Work/life balance
Land use	Land use Land use	Land use capacity modelling (CSIRO) Land use planning – modelling tourism versus other
	Land use	Landscape capacity – including protecting attributes (viewscales) as well as resource capacity
	Protecting assets	Protected area use – green expectations – youth needs, parks – national parks, current & future needs perceptions
	Protecting assets	Vulnerability of different areas (sea level impacts etc)
Leadership	Leadership Leadership Leadership	Leadership National champions role Role of National champions/ industry leadership
Market / Marketing	Market needs Market needs Market optimisation Create market position	Consumer demand Market needs Market optimisation & product optimisation Needs to advantage business – create market position
	Distribution channels – research	Product distribution & packages



<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
	Is current market sufficient?	Tourism market size/growth & residential catchment size – business model experience – city pairs – tipping point – domestic vs. international – SE Asian region opportunity with aircraft range & LCC model – middle class – LCC impact on destination marketing – short haul – high line information
	Reassess current product	Business vs. leisure
	Pricing metrics	Consumer pricing \$
	Market performance	Market performance
	Market performance	Market performance
	Technology	Peak oil – transport implications, technology options for adaptation, car travel, rail/packages
	Pricing metrics	Price inputs & effect on travel option decisions by consumers
	Reassess current product	Relativity of mainstream opportunities to country – display
Modelling	Best practice models	Defining best practice process as a core component of destination
	Best practice models	Best practice guidelines & templates
	Best practice models	Successful organisational frameworks
	Best practice models	Best practice models for destination management
	Market shift models	Framework – models for considering ‘real time’ market shifts
	Best practice models	Organisational structures – best practice model for destination management (principles & guidelines)
	Best practice models	Principles for management / guidelines
	Best practice models	What is a tourism destination – top down or bottom up approach – how to get the nexus right
	Best practice models	What is best practice destination management?
Performance measurement	Destination & business management, planning, monitoring, performance evaluation	Business diagnostic tools for people entering sector – high rate of business attrition – pre-feasibility assessment – elasticity / carbon pricing options
	Tools for monitoring industry performance	Business tools & diagnostics for industry
	Destination & business management, planning, monitoring, performance evaluation	Business diagnostic tools
	Destination & business management, planning, monitoring, performance evaluation	Business model experience, city pairs – tipping point for sustainability, south east Asian region, middle class, short haul, high line information
	Destination & business management, planning, monitoring, performance evaluation	Business tools (viability test) diagnostic
	Destination & business management, planning, monitoring, performance evaluation	Destination management
	Tools for monitoring industry performance	In response to – business attrition in the sector
	Tools for monitoring industry performance	Indigenous enterprises – communication of tools – combination of tourism product & cultural experience (not just a product) – flexibility & recognition

**STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008**

<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
	Tools for monitoring industry performance	Industry needs operational practical advice (tools)
	Destination & business Management, planning, monitoring, performance evaluation	Reinvestment/performance criteria, attributes, carrying capacity, option case studies
	Tools for monitoring industry performance	Small business support toolkit
Policy	Roles & responsibilities	Increasing role of govt vs. private sector e.g. Airlie Beach Lagoon
	Flexible policy that enables & supports industry	Government policy support
	Increase policies	Insurance company policy changes impacting businesses within certain distance from coastline
	Reduce regulation	Less regulation
	Policy funding	Policy funding
	Tactical & strategic research	Tactical responses
Product development	Adventure tourism	Adventure & events
	Product demand	Demand – regional product
	Product requirements	Infrastructure support, product requirements
	Product development	Product development
	Product development	Product development (pump prime)
	Product development	Product development process as component of destination management
	Product requirements	Regional access – product needs
	Product demand	What is the relative competitive demand of product?
Quality	Quality destinations	Quality ‘destinations’ (shifts demand)
	Quality product	Quality product experience in Australian context
	Quality workforce	Quality workforce – career training, pathways
Research	Case studies & modelling	Case study orientation
	Understanding consumer behaviour	Demand domestically 2020
	Understanding consumer behaviour	Market identification – commercial visitor vs. VFR
	Understanding consumer behaviour	Social trends (global/international & national/domestic)
	Understanding consumer behaviour	Are there generational shifts in tourism behaviour & decisions?
	Understanding consumer behaviour	Baby boomer – international change what are demand points?
	Case studies & modelling	Case study models of success
	Understanding consumer behaviour	Consumer understanding / behaviour – trigger points, marketing response, competitive gain
	Turn current information into knowledge	Data/package
	Understanding consumer behaviour	Demand internationally by 2020
	Understanding consumer behaviour	Demographic change
	Understanding consumer behaviour	Domestic vs. international motivations & decisions
	Understanding consumer behaviour	Domestic vs. International purchase decisions
	Understanding consumer behaviour	Framework – model for considering real time market shifts
	Understanding consumer behaviour	Future scope – international market needs
	Understanding consumer behaviour	Generational shift in tourism behaviour & decisions e.g. less pure nature, more adventure
	Needs metric	Informed information – industry needs information (need metrics)

## STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008

Broad Theme	Specific Issue	Original Label
	Social economic modelling	Interpretation of broader social research on tourism sector – social pulse, work-life balance
	Needs metric	Metrics must be consistent national (understanding connotations)
	Data availability, management & use	National & regional data
	Data availability, management & use	National vs. regional data
	Needs metric	Needs metrics – understand impact as an industry, define competitive advantage
	Understanding consumer behaviour	Observed trends? – Demographic change, growth of quantity not quality, decline in small accommodation in regions, business events opportunity vs. leisure, interest in national parks declining? Youth?
	Data availability, management & use	Operator take up of research – engagement (extension strategy required)
	Local level data	Research – local area data & flexible data sets, data access & packaging to inform decisions
	Scenario modelling	Scenario planning
	Social economic modelling	Social pulse
	Understanding consumer behaviour	Social trends 'attitudes' motivations
	Understanding consumer behaviour	Social trends & motivations
	Tactical & strategic research	Tactical research – shifts in demand (short term)
	Tactical & strategic research	Tactical research needed as well as strategic – e.g. shifts in short term consumer
	Understanding consumer behaviour	Tracking market performance
	Understanding consumer behaviour	Tracking performance by market
	Economic modelling	Trigger point economic model
	Turn current information into knowledge	Use existing research (aggregate, decipher, dissemination)
Risk management	Risk management & strategic response	Demand caused by crisis/ other external factors (tourism vs. retail vs. other spend)
	Risk management & strategic response	Regular tracking data of impacts of global credit crisis as an example.
	Risk management & strategic response	Response
	Risk management & strategic response	Risk management – some tools available (extension strategy required)
	Risk management & strategic response	Risk management – tools are there – extension
Sustainable development	Yield vs. volume – defining growth	Growth of quantity of tourism not quality (viability/sustainability?)
	Yield vs. volume – defining growth	Need middle class vs. \$ money
	Yield vs. volume – defining growth	Quality vs. quantity \$viability
	Yield vs. volume – defining growth	Sustainability defined (capacity, value, return (yield)), yield measurement
	Sustainable industry – viable industry	Sustainable small businesses – support tools, benchmarking
	Sustainable development	Tourism planning, destination/supply, social outcomes
	Yield vs. volume – defining growth	Volume vs. quality
	Yield vs. volume – defining growth	What is growth? – balanced growth versus volume, defining desired outcomes
Technology	Turning data into knowledge & industry education	Data – knowledge transfer learning
	Technologically advanced industry	Energy capture / offset sink / technology efficiency
	Technologically advanced industry	Innovation / best practice

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***STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008***

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<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
Triple bottom line	Triple bottom line	Policy linkages TBL
	Triple bottom line	TBL x 4
	Triple bottom line	TBL approach needs to be applied to all best practice research & modelling by STCRC
	Triple bottom line	TBL approach to all best practice modelling
	Triple bottom line	Winners

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## **APPENDIX G: PERTH WORKSHOP**

**Location:** Perth Convention and Exhibition Centre

**Date:** Friday 21 November 2008, 8.45am – 4.45pm

**Facilitator:** Mr Stewart Moore, CEO, EC3 Global

**Attendees:**

<b>Title</b>	<b>Full Name</b>		<b>Job Title</b>	<b>Company</b>
Ms	Margaret	Wilson	Branch Manager WA	Australian Tourism Export Council
Ms	Sharon	Dignard	Adviser, Industry Policy	Chamber of Commerce & Industry WA
Ms	Peta	McAuliffe	Business Development Officer, Business & Tourism	City of Swan
Mr	David	Mazitelli	Principal	David Mazitelli Pty Ltd
Mr	Chris	Pye	Managing Director	Hospitality Inns, Drive WA
Mr	James	Duggie	Principal Policy Officer Adaptation	Office of Climate Change, Dept of Environment & Conservation
Mr	Mark	Kendall	Commercial Manager	Perth Convention & Exhibition Centre
Ms	Claire	Savage	Managing Director	Savagely Creative
Mr	Terry	Penn	Director	Tourism Co-ordinates
Mr	Steve	Crawford	Director Strategic Policy	Tourism WA
Ms	Derryn	Belford	Manager - Research & Analysis	Tourism WA
Mr	Jim	Sargent	Strategic Policy, Industry Development	Tourism WA
Ms	Laura	Tricker		Tourism WA
Mr	Colin	Ingram	Manager, Park Policy & Services	WA Dept of Environment & Conservation
Ms	Amanda	Smith	Social Science Coordinator	WA Dept of Environment & Conservation
Ms	Jessica	Lenney	Community Policy Officer	WA Local Government Association
Ms	Kylie	Adams	Chairperson	Young Australian Tourism Association

**Attendees from host organisations:**

<b>Title</b>	<b>Full Name</b>		<b>Job Title</b>	<b>Company</b>
Mr	John	Fitzgerald	COO	STCRC

**STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008**

<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
Access and Aviation	Aviation	LCC impact on destinations à consumer behaviour – domestic, inbound & outbound
	Aviation	LCC impacts (aviation)
Advocacy	Advocacy & community value Corporate social responsibility	Community understands/ values Tourism CSR – social impact assessment in legislative framework (in QLD)
	Cultural benefits & community development from tourism	Strong Indigenous culture & storytelling (addressing barriers)
Balanced scorecard approach	Balanced scorecard	The balanced scorecard **
Business events	TBL impacts of events	Understanding events benefits / TBL impacts
Climate change	Tracking the 'carbon footprint'	Size of footprint
Communication	Increased communication	Communication & extension
	Increased communication	Communication strategy (rebid)
	Increased communication	Communications – marketing influencing consumer behaviour
Competition versus cooperation	Competition	Competitive environment/industry exposure
	Competition	Competitive industry (competition Asia Pacific)
	Competition	Competitive issues/exposure (model trade exposure)
Destination management and planning	Industry education	Education – curriculum, career path
	Increase tourism leadership skills	Governance, leadership & management capacity of our tourism structures
	Holistic approach	Holistic ownership
	Land use	Local regional land use planning – coastal
	Cooperation & coordination	Partnerships STO & industry
	Improve tourism policies	Planning & approval processes
	Strategic management	Strategic focus
Cooperation & coordination	Strong connections & partnerships	
Economic modelling	Impact scenario model of tourism	Criteria for trade exposure subsidy
	Impact scenario model of tourism	Economic model
	Impact scenario model of tourism	Economic model – impacts
	Impact scenario model of tourism	ETS – economic modelling, carbon price impact, scenario planning, pricing points
	Impact scenario model of tourism	Modelling destination opportunities & impacts & actions from resource boom communities (or other industries)
Engagement	Engagement	Community engagement by tourism industry
	Engagement	Range of engagement – mainstream, ownership, front line, cultural, what is the detailed needs of the market (international / domestic)
Environmental	Measuring environmental management & tourism impacts (positive & negative)	Environmental – impacts of cruise shipping
Future traveller	Demographics	Demographics – domestic & international
	Priority destinations	Priority future growth destinations
Industry development	Increase opportunities	Enterprises have opportunities
	Benchmarking	Industry comparison to other industries
	Communicating industry outcomes	Industry outcomes 'translation'
	Increase structural efficiency of industry	Industry structure support
	Succession planning	Succession planning for existing businesses
	Measuring tourism development	Thresholds of tourism development
Industry transformation to allow for adaptation	What are the limits of acceptable change?	Limits of 'acceptable change' – what are the values & how do we manage & measure those (evolving) values
	Strategic management	Mitigation adaptation

## STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008

Broad Theme	Specific Issue	Original Label
Innovation and product development	Innovation strategy & product development	Indigenous tourism opportunities – also sameness of product is an issue
	Innovation strategy & product development	Innovation to assist industry – offsets, new technology, reduced energy use
	Innovation strategy & product development	Product innovation – Indigenous, drive, protected areas, built environment, experience
	Innovation strategy & product development	Product innovation in protected areas – built environment, experience
	Innovation strategy & product development	Product innovation, Indigenous, drive, other
Investment	Long-term investment focus	Investment community understands (long term) returns
	Investment in infrastructure	Investment infrastructure – urban, regional, planning & approvals (best practice, TTF?), Accommodation
	Optimal investment	Optimum level of capital investment / demand – protected areas
	Viable businesses	Viable enterprises (ROI)*
Labour and skills development	Workforce attraction/development	Appeal ‘brand image’ of industry – career
	Workforce attraction/development	Employment conditions i.e. wages, career paths
	Career paths & remunerations Strong workforce	Employment, wages, career paths Strong capable workforce/career paths
Land use	Land use	Government Planning support/land use
	Land use	Local regional land-use planning – coastal
	Protecting assets	Strong stewardship – Protecting assets
Leadership	Leadership	Leadership – advocacy of science
	Leadership	Leadership & advocacy – advocacy of science
	Leadership	Strong leadership – government & private sector
Market/Marketing	Market needs	Consumer expectations
	Is current market sufficient & what does it look like?	Cultural/social, domestic, inbound à what does the market look like?
	Market optimisation	Customer base delivering profitability à domestic & international needs
	Market needs	Customer expectations
	Indigenous tourism	Indigenous tourism (domestic & inbound)
	Is current market sufficient?	market fit with Australia
	marketing effectiveness	Effectiveness of tourism marketing
	New markets	Emerging market – China, India
	Market response to climate change	Market (consumer) response to climate change – market needs, product development needs
	New markets	Markets emerging – China , India
	Nature based tourism trends	Nature based tourism – uniqueness?
Nature based tourism trends	Nature based uptake	
Marketing	Tourism marketing – communication, technology	
Marketing	Tourism marketing – communication, technology	
Modelling	Best practice models	Best practice destination management models – planning, organisations, community TBL
	Best practice models	Best practice destination management models i.e. organisational structures & the differences of destinations
	Best practice models	Best practice planning & approval process (comparative case studies)
	Best practice models Case studies & modelling	Best practice regions Case studies as a part of models

**STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008**

<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
	Best practice models i.e. for destination development & innovation	Model – best practice, planning, organisations, community (TBL)
	Best practice models i.e. for destination development & innovation	Planning & approval processes/ frameworks for development
	Yield modelling	SM(T)E yield management modelling
	Solutions modelling	Solutions modelling
	Yield modelling	Understanding yield – yield modelling
	Modelling to prove value of tourism – advocacy	Value of tourism modelling progressing greater engagement of community
Performance measurement	Tools for monitoring industry performance	Simple explanation tool for industry – industry can do something ‘what can we do’ (business improvement focus)
	Tools for monitoring industry performance	Small business tools
	Tools for monitoring industry performance	Small business tools & support
Policy	Flexible policy that enables & supports industry'	Analysis of government support – infrastructure, business skills & management (success/failure)
	Flexible policy that enables & supports industry	Government policy & politics – market responses, industry responses, emissions trading scheme – impacts, understanding – tools for industry, practical response, regional mapping of impact
Product development	Product demand	Affordable coastal accommodation – consumer impacts, staff impacts, community & brand impacts
	Product development	Experience linkages – infrastructure & critical mass
	Nature based tourism trends	Future demand for nature based experience – passive / active
	Nature based tourism trends	How markets experience nature/national parks (segmenting) – an advantage for Australia?
	Interpretation	Interpretation
	Packaging	Packages/experiences – self determined involvement
Research	Data availability, management & use	Application ‘how to’
	Understanding consumer behaviour	Changing demographics – domestic & international – what does the market look like?
	Community modelling	Community modelling for destination management – mining case study, soft-hard investment
	Community modelling	Community modelling, mining, case study, soft & hard investment
	Understanding consumer behaviour	Consumer expectations & behaviours
	Understanding consumer behaviour	Customer behaviour & motivations
	Information support	Information support
	Local level data	Local area data
	Centralised knowledge database	National research agenda
	Data availability, management & use	User friendly format
Risk management	Risk management & strategic response	Market challenges & risk – market expectations, product, cultural, access, visas,
	Risk management & strategic response	Market challenges & risk, market expectations – product, cultural, access, visas, market fit with Australia
Sustainable development	Yield vs. volume – defining growth	Maximise yield & expenditure
	Sustainable development	Sustainable resources as a platform across all themes
	Sustainability	Trading hours sustainability



**STRATEGIC ISSUES FOR AUSTRALIAN TOURISM 2008**

<b>Broad Theme</b>	<b>Specific Issue</b>	<b>Original Label</b>
Technology	Turning data into knowledge & industry education	Consumer interaction & take up. Data management, UGC – social networking
	Impacts of technology	Digital impacts / technology
	Digital technology	Digital technology influence
	Interpretation technology	Interpretation technology
	Technologically advanced industry	Technology – bookings, communications, marketing, mapping, GPS, push/pull
	Virtual technology	Technology – virtual reality (multi sensory) – Communications / broadband
	Turning data into knowledge & industry education	Technology data dist – content for multiple application
	Using technology to increase business sustainability/viability	Technology options for business sustainability
	Turning data into knowledge & industry education	Technology – bookings, communications, marketing, mapping, GPS, push/pull, consumer interaction & take up, data management, UGC social networking
Triple bottom line	Triple bottom line	TBL models

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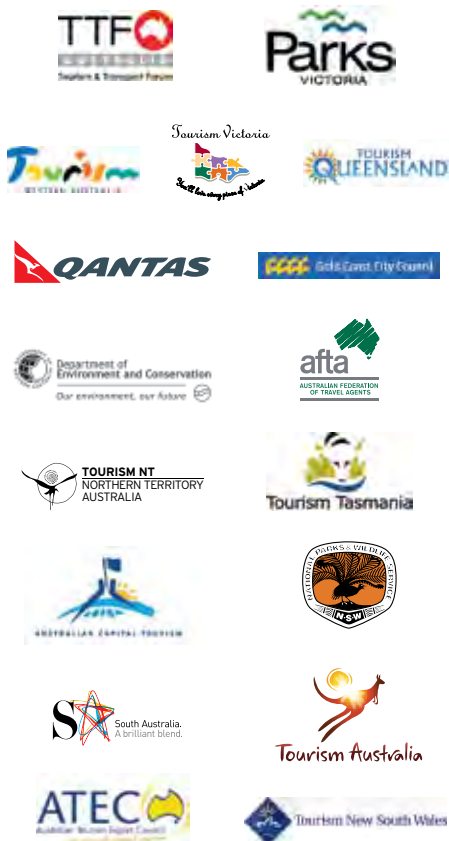
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Ms Char-lee McLennan has a Bachelor of Hotel Management (Event Management)/Bachelor of Business (Financial Economics) with First Class Honours from Griffith University. She has previously worked as a Tourism Research Officer in the tourism branch of Gold Coast City Council. More recently she was working as the project officer on the International Visitor Survey for Tourism Research Australia. She now works as a Senior Research Technician for the School of Tourism at the University of Queensland where she is a PhD Candidate. Her PhD topic focuses on Tourism Economics and Strategic Destination Management.

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Sustainable Tourism Cooperative Research Centre (STCRC) is established under the Australian Government's Cooperative Research Centres Program.

STCRC is the world's leading scientific institution delivering research to support the sustainability of travel and tourism—one of the world's largest and fastest growing industries.

### Introduction

STCRC has grown to be the largest dedicated tourism research organisation in the world, with \$187 million invested in tourism research programs, commercialisation and education since 1997.

STCRC was established in July 2003 under the Commonwealth Government's CRC program and is an extension of the previous Tourism CRC, which operated from 1997 to 2003.

### Role and responsibilities

The Commonwealth CRC program aims to turn research outcomes into successful new products, services and technologies. This enables Australian industries to be more efficient, productive and competitive.

The program emphasises collaboration between businesses and researchers to maximise the benefits of research through utilisation, commercialisation and technology transfer.

An education component focuses on producing graduates with skills relevant to industry needs.

### STCRC's objectives are to enhance:

- the contribution of long-term scientific and technological research and innovation to Australia's sustainable economic and social development;
- the transfer of research outputs into outcomes of economic, environmental or social benefit to Australia;
- the value of graduate researchers to Australia;
- collaboration among researchers, between researchers and industry or other users; and
- efficiency in the use of intellectual and other research outcomes.