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Author

Ruhanen, Lisa, McLennan, Char-lee

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STRATEGIC ISSUES IN THE AUSTRALIAN TOURISM INDUSTRY: AN ANALYSIS OF NATIONAL TOURISM STRATEGIES AND PLANS

Lisa Ruhanen

University of Queensland

Char-lee McLennan

University of Queensland

ABSTRACT

Predicting future events, trends and issues that will impact on the tourism sector is not an exact science. The 21st century has already seen a number of significant, radical and unexpected events, and in many instances the industry has not been prepared to respond to the magnitude of these, nor appreciated the extent to which such events would impact on tourist activity and businesses. In such a volatile global climate, more than ever there is a need for the tourism industry as a whole to embrace a disciplined, structured and continuous approach to identifying and monitoring future trends and issues to inform policy making and strategic planning. The tourism sector has often been criticised for its lack of strategic direction, particularly in relation to policy and planning. Indeed, some have described the public sector as being overtly concerned with marketing and product development. Given this background, the purpose of this paper is to present the results of an analysis of current and future issues identified in a sample of Australian national level tourism strategies and plans. The results show that despite pressing global issues such as climate change, at a national level, the Australian tourism industry is primarily concerned with issues of product development and marketing.

Keywords: strategic issues, policy, planning

INTRODUCTION

As has been the case in many countries around the world, the Australian tourism industry has faced considerable challenges, particularly over the past decade. The spin-off effects of terrorism, political unrest, natural disasters and pandemic diseases in the region, coupled with skilled labour shortages, and the urgent need to address climatic changes, environmental management and sustainable development have all taken their toll on the viability and growth of the Australian tourism industry. This year alone, an imminent recession in the United States is expected to have catastrophic impacts on the economies of many countries. In Australia, interest rate rises and a slowing economy have forced further pressure on an already besieged tourism industry. Indeed, it has been claimed that the health of the tourism industry is inextricably entwined with issues as diverse as new food technologies, a changing natural environment, a looming global water crisis, potentially pandemic diseases, new transport technologies and the sciences that drive advances in metal technologies, fuel efficiencies and engine technologies (Cooper, Prideaux & Ruhanen, 2003). Further, changing consumer demographics and behaviour patterns, maintaining share of discretionary income from substitution goods, and strong competition from other destination markets mean the industry has to take a more strategic destination management approach to its planning to remain competitive (Russell, 2000).

The ability of destination planners and managers to identify and plan for both current and future issues that will, or may, affect the tourism industry is paramount. Failure to do so has proven to adversely impact on the industry's viability and competitive advantage. The identification, analysis and monitoring of key industry trends and issues is a fundamental prerequisite to the policy and strategic planning process yet the tourism industry is often accused of lacking this strategic view. Indeed, one could say that there is marketing, as opposed to management, mentality

in Australia (Hall, 2003; Faulkner, 1994; Ruhanen, 2004). However, is this criticism fair? Given the spotlight on the environment, climate change and sustainable development over recent years have industry planners and managers broadened their previously limited scope of concern? Therefore, the purpose of this paper is to present a synthesis of the strategic issues identified in a sample of Australian national level tourism strategies and plans published since 2000. The paper aims to provide a platform for discussion and debate with colleagues regarding strategic issues for the tourism industry and concomitantly, critique the ability of the tourism industry to keep abreast of contemporary issues and challenges to inform policy making and strategic planning.

LITERATURE REVIEW

Undoubtedly the tourism industry, like other economic sectors and industries, is impacted upon by trends, issues and challenges at the international, national and local levels. Globally, the tourism industry has been criticised for its ability to proactively identify, prepare and respond to issues that impact, either directly or indirectly, on the sector. The September 11 terrorist attacks, while certainly unprecedented in terms of scale, led to a flurry of new initiatives and actions with respect to risk management and disaster preparedness. However, the tourism industry was again unprepared to respond to the spin-off impacts of SARS, Foot and Mouth and outbreaks of Avian Influenza on tourism demand. Arguably, the industry has improved its capabilities in this area. For instance the actions taken by the Thai government following the Indian Ocean Tsunami or those of the Queensland State government in the wake of Cyclone Larry in Far North Queensland show a higher level of preparedness and more proactive approach than has been the case in the past.

The ability of destination planners and managers, and indeed the industry as a whole, to proactively identify current and emergent issues and trends is a crucial factor in maintaining competitive advantage. Awareness of, and preparedness for,

changes in consumer markets, the environment, and global economy are vital if the industry is to remain 'ahead of the pack' and implement strategic actions to alleviate any negative consequences. However, the tourism industry has been criticised for being responsive rather than proactive in identifying issues and trends and this impacts on the ability of policies and plans to adopt a strategic view. This criticism can certainly be applied to the tourism public sector. The public sector has traditionally been viewed as responsible for higher order planning, but they have been found guilty of lacking a strategic view (Cooper, 1995; Dredge & Moore, 1992; Page & Thorn, 1997). As Jenkins (1991, p.62) notes, "ad hoc responses to tourism opportunities and problems do not constitute a policy for tourism, they merely provide short-term solutions to essentially long-term problems".

At each level of government in Australia there has been a tendency, and an inherent organisational mandate, to focus on marketing, promotion and product development, usually in that order. It has been noted that a preoccupation with marketing in Australia, at the expense of research, strategic planning and other activities has been to the detriment of a more balanced and rational approach to the development of the tourism industry (Faulkner, 2003). Referring to the need for increased funding for research, Hall (2003, p.200-201) provides an interesting commentary that illustrates the overemphasis on tourism marketing in Australia. He writes that,

"The transfer of funds from policy, planning and research to the promotional functions of state government agencies led the then Director of the Bureau of Tourism Research, Dr Bill Faulkner, to comment publicly on the emergence of 'advertising fundamentalism', whereby research programs were being downgraded to spend more money on advertising. As Faulkner commented: it is unlikely that research into, for instance, the environmental and social impacts of tourism would be carried out under the market forces regime, even though the problems in these areas could eventually render the tourism product of particular regions unsaleable. That Dr Faulkner hit a raw nerve

with his comments was indicated by the reply of the New South Wales Minister of Tourism... who stated that: to accuse the commission of 'advertising fundamentalism' merely highlights deficiencies in Mr Faulkner's own research into this subject. Over a decade later such a debate remains very relevant, and the minister's comments reflect a deep division as to the role and character of government involvement in tourism in Australia and as to the future nature of tourism development. More often than not, success in tourism in Australia is measured in terms of numbers of visitors and their expenditure rather than the net benefits to be gained from tourist visitation and associated tourism development".

Tourism destination strategic planning involves making a sequence of choices and decisions about the deployment of resources committing a destination to a future course of action (Brownlie, 1994). Indeed, strategic planning is defined as a rational, analytical thought process; taking into account the opportunities offered by the environment, the strengths and weaknesses of the organisation, culminating in a detailed specification of both the long-term aims of the organisation and the specific strategy for achieving these aims (Hussey, 1999; Kotler, Adam, Brown & Armstrong, 2001). In a tourism destination context it requires a deliberate, integrative and formalised plan which will permit the destination to adapt quickly to changing situations and develop information, planning and control systems to monitor and respond to this change (Chon & Olsen, 1990; Cooper, 1995). Importantly, it also emphasises the need for both short and long term objectives which can accommodate changing circumstances, and which the sector can be judged against in the future (Cooper, 1995; Faulkner, 1994; Hall, 2000; Hall & McArthur, 1998).

In such a volatile global climate, more than ever there is a need for the tourism industry as a whole to embrace a disciplined, structured and continuous approach to identifying and monitoring future trends and issues to inform policy making and strategic planning. So what are the big picture issues that should be on the tourism industry radar?

Current Issues and Trends

It is certainly not an easy task to predict the future although academics, researchers, government and industry commentators spend much time considering what the next big issue will be. The purpose of this paper is not to labour over likely trends but it is useful to consider some of the current and possible future issues. Emerging tourism industry trends are given an annual platform for discussion and debate amongst academia, industry and government members of *Trinet* with Dr David Edgell's annual call for input into a list of the ten most important issues for the forthcoming year. The issues identified for 2008, ranked in order of priority, consisted of:

1. Safety and Security in Tourism
2. Best Practices for Managing Sustainable Tourism
3. New Developments in e-commerce tools in tourism
4. Effect of Climate Change on Tourism
5. Influence of the World's Economy on Tourism
6. Tourism Policy and Planning
7. Tourism Education and Training
8. Marketing Quality Tourism Products and Experiences
9. Partnerships and Strategic Alliances in Tourism
10. Impact of Natural and Other Disasters and Health Concerns on Tourism

The 2007 list also featured safety and security as the number one issue. Other issues that appeared on both the 2007 and 2008 lists include: e-commerce; sustainable tourism; education and training; and, policy and planning. Interestingly, issues such as climate change did not feature on the 2007 list possibly attributable to the flood of media interest that has occurred in the past 12 months. Further, sustainable tourism was ranked lower at number four in 2007 as opposed to its second place on the 2008 list.

Although the list of the ten most important issues for 2009 was not released at the time of submission, Edgell in his *Trinet* post of the 17 September, noted that for 2009 the themes emerging were: the impact of fuel costs on tourism; influence of the economic downturn in many countries on tourism; growing concerns over the sustainability of tourism; impact of conflicts and wars on tourism; natural disasters and tourism; climate change and tourism; tourism safety and security; strategic tourism planning for the future; marketing tourism in a dynamic environment; education and training in the future; new technologies changing the marketing of tourism; and, space tourism. Not unexpectedly some of these issues are similar to those raised for 2008.

In Australia, a study was undertaken by Fredline, Jago & Day (2006) to identify tourism industry operators' perceptions of the impacts of various issues affecting their businesses. Using a scale ranging from very negative (-2) to very positive (+2) it was found that the most concerning issue was the increase in fuel prices, followed by labour shortages (Table 1).

Table 1: State of the Tourism Industry: Ranking of Issues

Issue	Average rating n=456
Increased fuel prices	-1.07
Labour shortages	-0.58
Flat growth in domestic tourism	-0.56
Profit levels or yield	-0.42
Concern about security	-0.40
Concern about pandemics	-0.33
Concern about natural disasters	-0.25
Airline regulation/deregulation	-0.17
Low Cost Carriers	-0.16
Exchange rates	-0.04
Industrial Relations reform	0.04
Changing distribution systems	0.16
Tourism marketing	0.23
Changing demographic profiles	0.62
Accreditation and professionalism	0.74

Source: Fredline, Jago & Day, 2006

RESEARCH METHODS

This paper presents the results of an analysis of strategic trends and issues identified in national tourism policy and planning documents. These results are a component of a larger study undertaken to audit and review current issues concerning the Australian tourism industry at the national, state/territory, regional and local levels. However, only the results of the national analysis are presented in this paper. The research was undertaken for the Sustainable Tourism Cooperative Research Centre (STCRC) to inform the National Tourism Alliance in the preparation of their forthcoming national tourism industry strategy.

A total of 24 national policy and/or planning documents were sampled and analysed using secondary content analysis, which is a recognised qualitative technique often applied in tourism planning (Janesick, 2000; Dey, 1993; Glesne, 1999). Documents sampled were limited to those published after 2000 to ensure relative relevancy, and those publicly available online due to the time constraints of the study. A number of the documents were sourced from Federal government departments or agencies such as the Department of Resources, Energy and Tourism or Tourism Australia (Table 2). Policies from tourism related agencies were also sampled to ensure that a cross-section of tourism related issues were included. Therefore, policy documents from the Wine Makers Federation of Australia and Restaurant and Caterers Australia were included. Documents were also sought on national tourism programs and assorted topics such as quality and accreditation. The sample presented is certainly not exhaustive and does not claim to be. The study is delimited by its objective of providing an overview and synthesis of the strategic trends and issues identified in a range of national tourism policy and planning documents. Further, no attempt has been made to weight papers relative to their 'importance' i.e. a national level policy as opposed to a marketing strategy. This is acknowledged as a limitation of the study and an issue to be considered in future research.

Table 2: Catalogue of strategic documents included in analysis

Document Author	Date of Publication	Document Title
AusIndustry	2008	Business Ready Program for Indigenous Tourism and Australian Tourism Development Program
Australian Tourist Commission	2002	China Strategy Study and Actions
Department of Industry, Science and Resources - Sport and Tourism Division	2000	Towards a National Sports Tourism Strategy
Department of Industry, Tourism and Resources	2003	Tourism Green Paper
Department of Industry, Tourism and Resources	2003	Tourism White Paper
Department of Industry, Tourism and Resources	2005	The Business of Eating Out: An Action Agenda for Australia's Restaurant and Catering Industry
Department of Industry, Tourism and Resources	2006	Revised Action Plan for the Development of the Australia-Pacific Cruise Industry
Department of Industry, Tourism and Resources	2007	Australian Government National Tourism Investment Strategy
Department of Resources, Energy and Tourism	2007	National Tourism Incident Response Plan
Department of Resources, Energy and Tourism	2007	Tourism White Paper Annual Progress Report, 2006
Department of Resources, Energy and Tourism	2008	Industry Quality and Standards
Department of Resources, Energy and Tourism	2008	National Tourism Accreditation
Indigenous Tourism Australia	2007	National Strategy for Indigenous Tourism 2007-2012
Organisation for Economic Cooperation and Development	2003	National Tourism Policy Review of Australia
Restaurant and Caterers Australia	2004	Restaurant and Caterers Australia Policy Platforms: Complete Policy Document
Department of Industry Tourism and Resources	2007	The Business of Eating Out: Restaurant and Catering Industry Action Agenda- Third Year Implementation Report
Tourism Australia	2005	National Road Tourism Strategy
Tourism Australia	2006	A Uniquely Australian Invitation: The Experience Seeker - Strategy and Execution
Tourism Australia	2006	Action Plan for Japanese Tourism: Embracing change
Tourism Australia	2007	Planning for Inbound Success
Tourism Australia	2008	Tourism Australia's Corporate Plan 2007/08-2009/10
Tourism Events Australia	2004	Tourism Events Australia Discussion Paper
Tourism Research Australia	2008	Through the Looking Glass: The Future of Domestic Tourism in Australia
Winemakers Federation of Australia	2007	Wine Australia: Directions to 2025 – An Industry Strategy for Sustainable Success

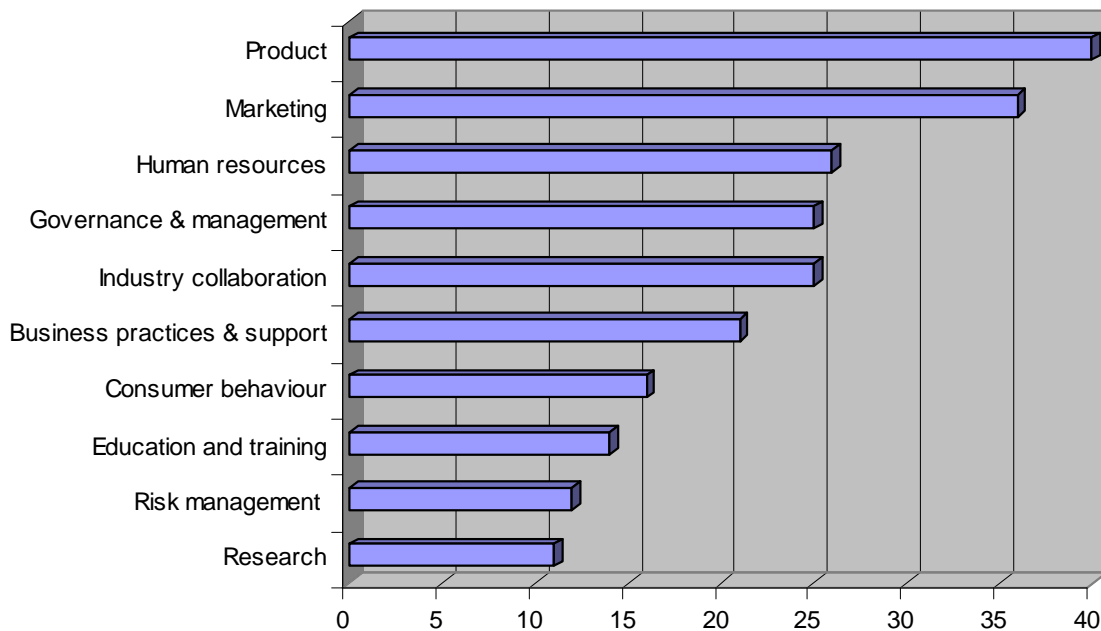
RESULTS

The 24 national tourism policy and/or planning documents were analysed and all cited strategic issues recorded. Each of the issues was then grouped within broader themes and a total of 24 themes were uncovered.

The two most frequently cited themes related to product (40 citations) followed by marketing (36 citations) (Figure 1). As detailed in Table 3 the product theme included issues such as the need to diversify product offerings and develop new products. Also within this theme was the need for quality and innovative products as well as the development of niche markets. In terms of marketing the most frequently cited issues included dissatisfaction with current industry marketing efforts and the need to target new markets with marketing campaigns (Table 3).

The third most prevalent issue identified in the analysis was human resources (26 citations) with most documents referring to skilled labour shortages. The issue of governance and management (25 citations) covered a range of issues including the need for strong leadership of the industry, enhancements to industry regulation and improved coordination with other agencies, for example, National Parks and Wildlife Services (Table 3). Also a frequently cited theme was the need for improved industry collaboration (25 citations), with all except one citation referring to the need for improved collaboration and coordination amongst the tourism industry.

Figure 1: Top 10 Issues Identified in Sampled Documents



Amongst the remaining top 10 themes were business support and practices (21 citations), consumer behaviour (16 citations), education and training needs (14 citations), risk management (12 citations) and research (11 citations) (Table 3). In terms of the business support and practices theme a diverse range of issues were cited in the analysed documents (Table 3), including profitability of tourism businesses and the need for increased funding and support programs for tourism businesses. The majority of consumer behaviour issues raised were in the context of changing consumer behaviour patterns (Table 3). Within the education theme improving education and training for the sector was considered an issue (Table 3). Responding to external threats/factors was the most frequently cited issue in the risk management theme and in terms of research; the need for increased data and information sources was identified as an issue (Table 3).

Figure two displays the remaining issues identified through the document analysis. These included issues of industry fragmentation and professionalism (10 citations), within the transportation theme (9 citations) the need to increase/improve

transportation services and further develop the aviation industry was identified, and in terms of infrastructure (8 citations) the issues identified focused on the need for new investment and development of new facilities (Table 3). Technology (7 citations), legislation (7 citations) and the distribution system (6 citations) were each cited in a number of the plans. However, the issues of regional tourism, sustainable tourism, environmental impacts of tourism and competition were each cited in only four plans respectively. The remaining issues identified were grouped within the themes of accommodation (3 citations), strategic destination planning (3 citations) and economic conditions (1 citation) (Table 3).

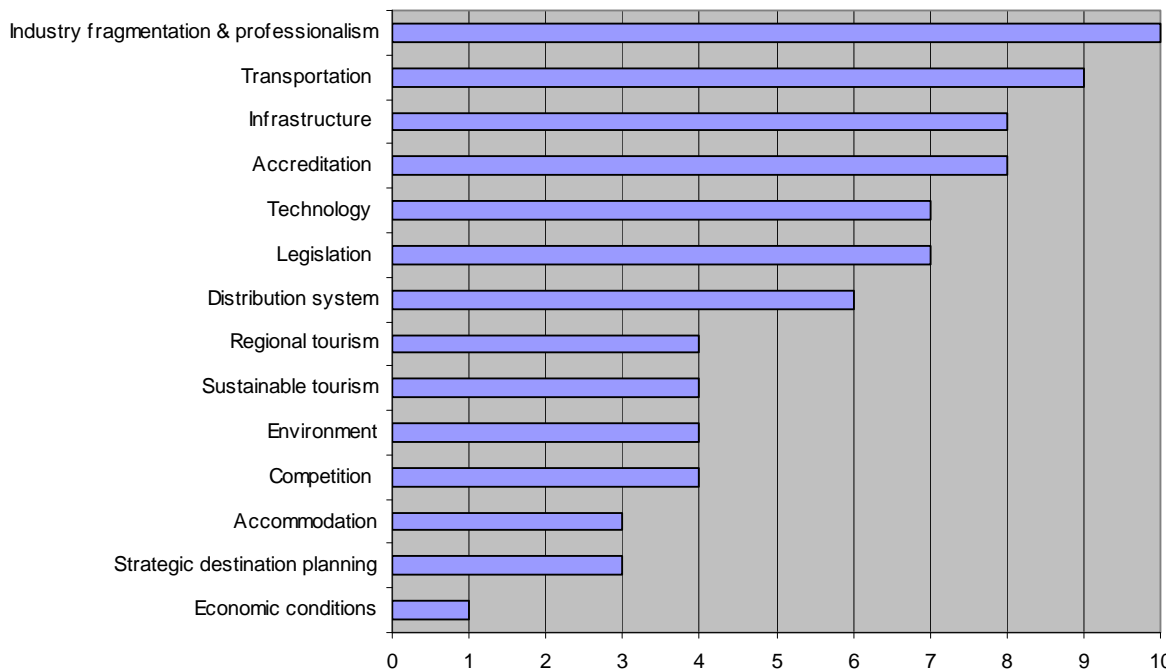
Table 3: Issues Identified by Theme, Sub-theme and Citation Frequency

Theme	Citation Frequency	Sub-themes	Citation Frequency
Product	40	Diversification/new products	10
		Quality/innovation	9
		Niche market development	8
		High yield/increase yield	7
		Attract/develop events	3
		Meet demand	1
		Road signage	1
		Pricing	1
Marketing	36	Unsatisfied with current marketing	9
		Target markets/new markets	6
		Branding/positioning	5
		Destination image/perceptions	5
		Awareness in key markets	4
		Cooperative marketing	3
		Trade/media events	3
		Innovative approaches	1
Human resources	26	Labour and skill shortages	9
		Perceptions of industry/conditions	6
		Flexible labour market	3
		Workplace relations/awards	3
		Indigenous employment	2
		Increase productivity	2
		Working-Holiday Maker Scheme	1
Governance & management	25	National leadership	8
		Regulation	5
		Coordination with other agencies	5
		Strategic management	2
		Membership of UNWTO	2
		Industry support programs	1
		Policy changes	1
		Emphasis on business development	1
Industry collaboration	25	Collaboration and coordination	24
		Unified political position	1

Table 3 cont.

Business practices & support	21	Profitability/profit margins Funding/support for business Business practices Skills of business operators Professionalism Productivity Lack of investment Challenges of SMEs Business viability Access to capital Service quality	3 3 2 2 2 2 2 2 1 1 1
Consumer behaviour	16	Changing consumer patterns Domestic demand/growth Emerging markets	10 5 1
Education and training	14	Education/training Develop labour force Community awareness of industry	10 2 2
Risk management	12	Respond to external threats/factors Strategic contingency planning Security	9 2 1
Research	11	Increased data Targeted research Capabilities in research	7 3 1
Industry fragmentation & professionalism	10	Quality and professionalism Fragmentation Capabilities of industry Benchmarking business practices	6 2 1 1
Transportation	9	Increased transportation services Aviation development Affordable transport Access	4 3 1 1
Infrastructure	8	New investment and development Usage of facilities	7 1
Accreditation	8	Business accreditation Approved Destination Status	6 2
Technology	7	Changing technology Adapt to communicate/marketing	4 3
Legislation	7	Taxation/GST Regulatory burdens Land tenure	4 2 1
Distribution system	6	Changes to distribution system Supply chain management	3 3
Regional tourism	4	Increase tourism in regions Dispersal into regional areas	2 2
Sustainable tourism	4	Sustainable tourism	4
Environment	4	Environmental impacts Eco-efficiency	3 1
Competition	4	Globalisation Competition from other markets Increasing competition	2 1 1
Accommodation	3	Increased stock needed More affordable options	2 1
Strategic destination planning	3	Increased emphasis on planning Strategic directions needed Destination management approach	1 1 1
Economic conditions	1	Current economic situation	1

Figure 2: Remaining Issues Identified in Sampled Documents



DISCUSSION

The analysis of strategic issues identified within Australian national tourism policies and plans provides some valuable insights into current trends, issues and concerns of the Australian tourism industry. A total of 24 broad themes were identified which represented some 89 individual issues.

Product development and marketing is still the dominant issue addressed in national level tourism documents. In part, this may be excused by the origins of some of the documents given that they are from bodies such as Tourism Australia which have an inherent marketing and promotion focus. However, it is somewhat concerning that the majority of the documents originated from the Department of Resources, Energy and Tourism (as it is currently known) which would be expected to have a far broader scope of concern than marketing and product development. Such findings lend support to previously outlined arguments by Hall (2003) and Faulkner (1994) that the Australian government has a preoccupation with marketing

and product development. While other issues featured in the ‘top 10’, the frequency of these did not match that of product development and marketing with 40 and 36 citations respectively. If the remaining strategic issues are considered alongside those identified by Edgell (2007) as the top 10 issues for 2008 some discrepancies can be noticed (Table 4).

Table 4: Top 10 Issues –Australian National Policies vis-à-vis Edgell (2008)

National Tourism Policies and Planning Documents	Ten Most Important Issues for 2008 compiled by Edgell via Trinet
1. Product development	1. Safety and security
2. Marketing	2. Sustainable tourism
3. Human resources	3. e-Commerce developments
4. Governance and management	4. Climate change
5. Industry collaboration	5. World economy impacts
6. Business practices and support	6. Policy and planning
7. Consumer behaviour	7. Education and training
8. Education and training	8. Marketing/quality products
9. Risk management	9. Partnerships and strategic alliances
10. Research	10. Natural and other disasters

Product development and marketing do feature on Edgell’s compilation but for instance sustainable tourism which is ranked second by Edgell does not feature in the top 10 issues identified in the national plans. Similarly, climate change does not feature in the top 10 issues for national policies yet is ranked fourth on Edgell’s list. This is despite the fact that climate change is a major issue on the global agenda and the focus of considerable media attention at present. Such an issue presents a number of questions. Firstly, is the fact that climate change does not feature in the analysed documents a result of the time scale of the sampled documents and that, for instance, in the early half of the decade climate change was not a forerunning concern when these documents were written and published? Perhaps this is the case but for an issue like sustainable development this excuse cannot be used. Sustainable development has been a topical issue in the tourism industry for several decades; indeed it is ranked second on Edgell’s list. However, in the analysed plans sustainable development was only cited on four occasions. This is in spite of the fact that sustainability issues have reputedly become a key driver of the social and political agendas in many countries, including Australia (Berke, 2002; Jayawardena,

2003; Ruhanen, 2004). Stemming from criticisms of the government's marketing-centric approach other authors have noted that in Australia economic goals are given a far higher priority than social and environmental concerns in state and national government's tourism policy agenda (Hall, 1994).

CONCLUSION

The tourism industry will continue to experience rapid and unexpected change over the coming years. Catastrophic events, climate changes, the natural environment, changing consumer behaviour patterns, technology development: the list can go on. Continued volatility in the global marketplace and the urgent need to respond to issues of climate change and natural resource usage all suggest that the tourism industry is not set to enter a period of relative stability. As with past events there is a need for the sector to demonstrate preparedness and responsiveness to issues and challenges, ideally before they become a problem. Therefore, there is a need for proactive decision-making and strategic planning to maximise opportunities, minimise adverse impacts and maintain competitive advantages.

The ability of destination planners and managers to identify and plan for both current and future issues is vital. The identification, analysis and monitoring of key industry trends and issues is the basis of setting policy directions and developing strategic plans. The analysis undertaken of Australian national tourism industry policy and planning documents does highlight some deficiencies in the industry's identification of key and current issues. Product development and marketing are a major focus at the national level, yet less attention is given to issues of climate change and sustainable development, arguably a key concern at present. The results of this analysis do concur with the notion that Australian government policy is marketing centric (Hall, 2003; Faulkner, 1994; Author, 2005) and highlight the need to look at broader and more strategic issues, particularly at the Federal government level. Further research should examine this situation in the international context.

Further, this analysis points to some deficiencies in the timeframes associated with the policy and planning process, namely the lag between the development and publication of documents and the correlation between the actual issues and trends currently impacting on the industry. This suggests that in the 21st century 'traditional' policy and planning processes which can take months or even years to formulate may become increasingly outmoded and new approaches may be needed that can keep pace with the rapid and unexpected changes impacting on the industry at any given time. Given the conference theme of 'See Change: Tourism and Hospitality in a Dynamic World' it is hoped that this paper can provide a platform for discussion and debate amongst colleagues as they consider national responses to issues and challenges affecting the Australian tourism industry in what is certainly a dynamic world.

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