

Australian Tourism Futures: Redefining the Future Communiqué, 2009

August, 2009

Prepared by

**SUSTAINABLE
TOURISM**



CRC

Sustainable Tourism Cooperative Research Centre (STCRC)

for

Tony Charters and Associates

Convenor, Tourism Futures Conference, 2009

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Acknowledgement

This report was prepared for the Sustainable Tourism Cooperative Research Centre (STCRC) by Ms Char-lee McLennan, School of Tourism at the University of Queensland.

Background to this Communiqué

The Tourism Futures conference was first convened during 2002 and emerged from a period of intense industry crisis that resulted from the September 11 terrorist attacks and the collapse of Ansett Airlines. The Australian tourism industry is once again struggling through a period of intense difficulties, including a severe Global Financial Crisis (GFC), a health pandemic and declining visitation.

The conference, now in its seventh year, represents a vital national strategic planning tool that brings together tourism industry leaders (tourism operators, researchers, consultants, tourism associations and organisations, government and education providers) and facilitates the exchange of information and new ideas. The aim of Tourism Futures is to assess emerging trends, challenges and opportunities likely to occur over the next ten years in order to provide insight and clarity into necessary future action and identify priority areas.

This communiqué reports on issues arising from the Seventh National Conference on Tourism Futures, themed “Redefining the Future”. Hosted on the Gold Coast, Australia, from 17th to 19th of August 2009 it brought together some 300 industry representatives from a range of key tourism sector agencies and organisations, from all states and territories. This communiqué primarily aims to deliver a synthesis of the key issues arising from the 2009 conference and to provide insight into the present and future direction of the Australian tourism industry.

Executive Summary

Over the last decade, the Australian tourism industry has changed significantly. A sequence of crises, strong international competition and fundamental economic and social change have contributed to Australia’s international tourism sector underperforming and the domestic tourism sector faltering, while growth in outbound travellers has been positive. Understandably, there is considerable interest among the tourism industry over the content and priorities of the National Long-Term Tourism Strategy (NLTTTS).

This communiqué provides a synthesis of issues discussed during the Seventh National Conference on Tourism Futures, themed “Redefining the Future”. The conference brought together some 300 industry representatives from a range of key tourism sector agencies and organisations from across Australia. It occurred at an opportune time to provide unique insight into potential drivers of the Australian tourism industry and the likely recommendations to be proposed in the NLTTTS.

This communiqué concludes that the tourism industry is generally optimistic about the future. Conference participants indicated a growing paradigm shift in the minds of Australia’s tourism industry leaders, with emphasis shifting towards destination management as the core area for focus. Conference delegates identified that the tourism industry has matured over the past decade with stronger leadership in place and better cohesion. Notwithstanding, considerable challenges remain.

Conference delegates indicated that the Australian tourism industry is most likely to adopt a sustainable tourism destination management approach, as its long-term strategy. However, the current Global Financial Crisis (GFC) has shifted the industry’s immediate focus to short-term survival. As a consequence, it was clear from discussions that the industry is still not standing

as one on sustainability issues. While sustainability and climate change are key issues for the majority of industry leaders, some still remain attached to pure economic metrics to guide decision making. Furthermore, while Australia is highly regarded as a sustainable tourism leader, it has a mixed reputation more generally and is not known for its environmentalism. The argument for supporting sustainable tourism policy needs to be made to all ministers to ensure there is a common goal, that marketing will be genuine and effective (i.e. avoiding “green-wash”) and that all actions are directed to a triple bottom line approach. If fragmented, taking a sustainability approach to tourism will not be effective and possibly detrimental to the industry. A strong NLTTTS may help to support a sustainability strategy.

Conference delegates indicated that the GFC has provided new opportunities for innovation, and that the NLTTTS should deliver a clear vision, solid strategies for future growth and a framework for implementing actions. Both the GFC and the forthcoming NLTTTS have the potential to redefine the future of Australian tourism. This will only occur if the industry uses fresh thinking, creativity and innovative ideas to enable true industry transformation. While it is critical to think differently for the future, it is vital to learn from the past and ensure that mistakes are not repeated and strategies that have worked well are retained. Table 1 summarises a series of key actions and priority areas, identified during the conference, that are likely to guide the Australian tourism industry over the next 10 years.

The three day conference consisted of a number of different sessions aimed at drawing out key issues and suggested action items in order to conclude with a plan for the future. Day one commenced with Best Practice Forums which discussed five key subthemes in depth. These subthemes were:

- Consumer Research and Market Winning Insights
- Tourism Online – Marketing and Distribution
- Sustainability and Climate Change
- Business Events Tourism
- Destination Management – Policy and Development

Day two, ‘*Tourism Futures Top-line*’, consisted of a series of keynote speakers and interactive expert panel discussions. Day three focused on Charting the Future by holding a leader’s forum, half day workshops and report back session to complete the work of the first day’s subthemes.

The Current Environment for Australia's Tourism Industry

Tourism Futures Top-line

In mid-2008, the Australian tourism sector began to prepare a new National Long-Term Tourism Strategy (NLTTTS) to guide the industry over the next decade. It is being developed at a critical time for the tourism industry. Current events, such as the GFC, volatile Australian dollar and health pandemics have weakened Australian tourism. There are considerable concerns amongst industry leaders over what the Strategy will deliver and it was clear that there is a need to think differently for the future.

The recently released 'Jackson Report' which resulted from the NLTTTS Steering Committee's review process was discussed at the Tourism Futures Conference. This report made a series of recommendations about the future of the tourism industry and how it could potentially respond to challenges, importantly these included:

- Increasing investment, infrastructure and innovation to provide the capacity required to meet anticipated future demand;
- Developing service quality through skills development;
- Sustainability and climate change; and
- Balancing the focus between supply and demand issues, particularly as the industry requires more than just advertising to be successful.

Discussing the Report, conference delegates acknowledged that the industry has been debating the effectiveness of marketing for too long without sufficient action. It was noted that Australia has some of the best marketers in the world and that it is necessary for marketing and product development to be on-going. The delegates also noted that the industry has been aware of, and responding to, many of the challenges identified in the Jackson Report long before it was released.

The Tourism Futures Industry Leaders Survey revealed that industry leaders believed the top challenges for the industry during the next ten years were the impact of climate change, followed by global competition (Roy Morgan Research, 2009). This study also indicated that Australia's competitive advantage is its:

- Relative safety;
- Natural environment; and
- Culture (friendly people and diversity).

However, a number of presenters argued that Australia's reputation as a safe destination has been declining. This indicates a need to protect the perception of Australia globally while seeking new means of gaining a competitive advantage. Australia can increase its competitive advantage by having strong brand recognition, managing its tourism assets, creating loyalty amongst consumers, developing the skills of the tourism labour market and capitalising on trends in marketing, distribution, sustainability and strong destination management at the regional and national level.

Key Trends and Opportunities

A number of general key trends were identified as potentially impacting on tourism during the next ten years. These included:

- Weak domestic tourism activity
- Increasing outbound travel
- An aging population (increased senior tourism, but smaller workforce)
- Smaller households
- Pets travelling with their owners
- Reduction in home ownership (driven by choice and cost structures)
- Increasing levels of education
- A need for personal growth and spirituality
- Increasing focus on health and well-being
- Increasing demand for eco-tourism holidays and authenticity
- China will emerge as an economic superpower (will provide large tourism market)
- Social responsibility, sense of community and environmental awareness
- Continuing demand for value, family holidays and packages
- Marketing will occur via social networking (i.e. Twitter, Facebook and MySpace)
- A trend towards transformative experiences and 'meaningful' goods and services
- Increasingly multicultural Australian population – will result in people feeling less 'Australian' (and has implications for future marketing activities)

For the long-term, the conference delegates identified that change will be driven by factors such as technology, investment, infrastructure, innovation and climate change and that new product opportunities could include: senior tourism; ecotourism; national landscapes; iconic experiences; short-breaks; cruise tourism, indigenous tourism; underwater or floating resorts; medical tourism; in-flight experiences (i.e. weddings); and space-travel.

Key Challenges and Threats

A number of current and future challenges for the Australian tourism industry identified by the conference delegates included:

- The tyranny of distance
- Difficulty in changing supply to match marketing efforts
- Increased global competition
- Working in a 'carbon' managed economy
- Developing flexibility in skills, training and the workplace
- Developing flexibility in cost structures
- Developing the Aviation sector
- Increasing investment and overcoming a lack of capital
- Ensuring collaboration between industry, community and government
- Developing ecotourism – particularly more standard forms
- Understanding the demand side of tourism (as industry is dependent on demand)
- Surviving the current GFC

The GFC is perhaps the most pressing immediate challenge facing the tourism industry as it has reduced consumer confidence; reduced the demand for holidays; threatened the viability of many tourism businesses; resulted in the loss of some tourism jobs; and has potentially caused skill levels to decline as training has stagnated. The most challenging element of the GFC is that it has changed the industry's focus to the short-term (as they struggling to survive) and this

can be detrimental to longer-term strategies and plans. As a result, conference presenters emphasised that recessions are normal cycles and that there is a need to “ride them out”, arguing that discounting is not a good option as it will be difficult to raise prices again later.

Fortunately, Australia has performed better than other destinations during the GFC, although other destinations are expected to rebound quickly. It has also not impacted on the tourism industry evenly, with some sectors having continued to grow. For example, cruise ships have had strong, above average, growth due to their all-inclusive tickets, exotic destinations, high repeat visitation, family orientation, safety and security measures, on-board entertainment and innovative extras. The GFC has resulted in fundamental cultural change and has presented new opportunities for tourism that will be capitalised on as the economy recovers. It was apparent that successful businesses during recession tend to be the more flexible and adaptive organisations.

In the long term climate change is a formidable challenge and Australia, and its icon destinations, is particularly at risk. Tourism is both a significant contributor to, and as a nature based destination, at a high risk from, climate change. Concerted effort, agreed mitigation and adaptation strategies, will be required to shape long term policy and planning control.

Discussion of Key Strategies, Actions and Priority Areas by Sub-Theme

This section summarises the key strategies, actions and priority areas identified by the conference delegates that are likely to guide Australian tourism over the next 10 years.

Consumer Research and Market Winning Insights

Improving Australia's Profile through Marketing

The world has become a global market place and customer expectations are higher and extremely dynamic. While Australia is a small voice in the global tourism market, the GFC has seen it gain back market share. According to the Country Brand Index (FutureBrand, 2008), Australia has the strongest country brand in the world and is "that place more people would like to live in". It rates highly in natural beauty, friendly people, beaches, resort and lodging options, outdoor activities, sports, nightlife and extending business trips. However, Australia scores poorly in ease of travel, value for money, history, art and culture, shopping, conferences, environmentalism, technology and rest and relaxation.

In recent years Australia's reputation as a safe destination has been suffering and it has a poor promotion - conversion rate. This could be overcome by building compelling reasons for visiting and addressing negatives of price, effort and risk. Marketing should focus on Australia's uniqueness and maximise word of mouth, particularly by using social networking sites (i.e. Facebook, Twitter, MySpace) which are effective as brand recall is often higher if associated with friends or family. Public relations can increase cost effective marketing and brand awareness. The challenge for the future is to increase Australia's profile in-market by undertaking tactical marketing that will provide a clear message to both the domestic and international markets.

Presenters suggested that, in the future, people will be highly educated, stressed and older, with fluid identities that restrict them from neatly fitting into particular markets. As standards of living in developing economies rise, people in these countries will demand more materialistic experiences; while more developed countries will seek out authentic experiences. People will be increasingly 'restless', will travel more and will live in multiple cities with less attachment to a single 'base' origin. Places like airports and hotel lobbies will become 'the third place' (next important living space after home and office). This trend has already been recognised by some tourism organisations (i.e. 'Zero Baggage').

Key actions:

- Use language trends in marketing
- Review Australia's destination image in order to ensure it creates demand
- Stay on top of trends - know the market and which trends are impacting on them

Delivering Quality

As consumer expectations increase, quality will be essential and this will most effectively be delivered through flexible skills and a skills culture. Accreditation is another way to ensure quality and during times of good economic growth, tourism associations (i.e. ATEC and TTF) can effectively set standards by only allowing organisations of a certain level to become members. However, in periods of recession, accreditation is challenging as the industry's focus is no longer on quality, but rather on maintaining an existence (as businesses fail and staff are laid off). It was argued that during these times the industry is more concerned with action rather

than abstract ideas. Despite this, it was noted that industry needs to develop quality guidelines and that all businesses need to adopt these as quality will be essential in the future. For example, it was indicated that small businesses currently aren't matching big business quality wise.

Key actions:

- Flexible skills, a skills culture and accreditation
- Undertake customer satisfaction research and seek out feedback

Product Development

Product development in the future will need to be creative and start with the market. It will be important for government and developers to know the market and the destination's positioning in order to develop the right type of tourism products that meet the demand of existing and emerging markets (based on pre-empting trends through research). It will be necessary to have a good understanding of what different regions and operators are offering and to capitalise on strengths and unique resources. Product development will also need to utilise technology in order to personalise the experience and train the consumer.

One product emphasised for development was Australia's '*National Landscapes*'. While they are a unique competitive advantage for Australia, they currently lack investment (i.e. in accommodation, toilets and walking paths). They have a number of management issues, including variable leadership, no regulation controlling design standards which cross over state boundaries, which indicates a need for destination development in these areas to be approached in a different way. With around 600 National Parks in Australia, tourists are easily confused about the product and there is a need to simplify and consolidate tourist information and train Aussie Specialists about the product.

Key actions:

- Offer more than an experience: make memories, enhance learning, provide meaning, deliver personal satisfaction and offer chance for visitors to participate and contribute
- Develop Australia's '*National Landscapes*' brand /cluster.

Segmentation Strategies

Many-to-many direct marketing will become critical as the internet expands. It will be necessary to shift away from marketing to demographic segmentations and instead market to individuals. Simply defining the market by descriptive tools (i.e. demographics and activities) will no longer be effective. More sophisticated tools that tap into consumer behaviour will need to be employed, such as psychographic segmentation (e.g. NEOs, the creative class, consumer confidence and the experience seeker). There is a need to understand and determine the correct segmentation tool and then educate operators about the tool, particularly if it is complex psychographic segmentation.

Key actions:

- Use psychographic segmentation
- Use expertise in segmentation to make decisions and shape tourism activity

Weak Domestic Tourism

A systemic challenge for the Australian tourism industry over the long-term is weak domestic tourism which has been stagnant for some time, but more recently has started to decline. A changing social culture has seen many Australians stockpile leave and substitute domestic travel for other goods and services, such as outbound travel, technology, medical care and the home. This cultural change has been driven by financial pressures, the need to keep up with technology, increasing pressures from the workplace and a lack of spare time. It has been reinforced by the perceptions that:

- Australia is expensive
- Holidays are time-consuming
- Holidays are international travel

Australian tourism is highly dependent on domestic tourism, but increasingly it is seen as too expensive with many regular families and lower-income households having been alienated from the market. As a result, holidays are no longer as in-grained into the Australian culture as they previously have been in the past.

There is an opportunity to revive the domestic market, particularly as there are large annual leave stockpiles (approximately \$33 billion in wages). Higher tourism prices have been excluding Australian's from domestic tourism experiences. It is important for the Australian people to maintain a 'work-life-balance' for social well-being and many Australian regions depend on domestic tourism activity. Further development of the short break holiday market could contribute to maintaining domestic tourism, particularly as low cost carriers have made this market more viable with a greater variety of destinations. Importantly, it provides time-poor Australians a chance to undertake holidays and maintains it as a social norm.

Key actions:

- Stimulate the domestic market
- Offer value for money and help people budget for holidays
- Make it easier to plan holidays
- Highlight the importance of spending time together
- Give people a reason to holiday i.e. events and festivals
- Give people the ability and incentives to take time off
- Encourage leave through well-designed embedded policy
- Develop the short-break market

Tourism Online – Marketing and Distribution

The world is becoming an increasingly networked 'global society' and technology has become well in-grained into most societies. Consumers are becoming "tech savvy" and are making decisions far more rapidly than in the past. Importantly, technology has facilitated a shift from mass marketing (seen as white noise) towards many-to-many marketing (mass customisation). Recognising the trend, tourism has been adopting online tools for marketing and distribution activities and this has influenced the nature of the tourism industry. For example, the lag between booking and travelling has closed due to online sales initiatives from accommodation providers and low cost carriers (i.e. Wotif.com and Bestflights.com). The future may even see customers booking and paying via social network sites. However, much of the tourism industry, particularly small to medium enterprises (SMEs), lag behind in online initiatives.

As consumers gain greater access to information via the internet, they will become 'travel professionals' and will have the same information as travel agents. This will mean there will be a need to add real value. Moreover, consumers will access information everywhere, including while they are on holiday. This means that the opportunity to interact with the consumer isn't over once the trip has begun. It will be necessary to use maps (i.e. Google Maps and whereis.com) and mobile phone devices to inform tourists about products.

Technology has empowered consumers and is dictating marketing activities. Today it is no longer possible to simply have a website to maintain competitiveness. Potentially consumers may stop visiting business websites and will instead rely on content they receive as they interact with brands within the online environment. For example, Skittles does not have a single detailed website; rather it has a series of pages and information sources that highlight the features of the brand, such as on Facebook, YouTube and banner advertising.

There is major change occurring in media consumption and marketing channels, with a reduced reliance on traditional media. Discussions at the conference revolved around the rapid declines in newspaper and television advertising and fast increases in the use of the internet to obtain information (i.e. online news, social networking, search engines and online videos such as YouTube). These tools were seen as highly effective as they allow detailed audience segmentation (many-to-many marketing) which can maximise impact and minimise wastage.

It has become necessary for tourism marketers to understand, adopt and maximise tools such as the internet, social networking sites (i.e. Twitter and Facebook) and smart phones. This is mainly because changing consumer behaviour means that targeting via newspapers or television is no longer effective. There is some reluctance to adopt such marketing tools as they require an organisation to relinquish control over the marketing message. Clearly, a potential problem with the internet is that complaints can be posted online for public viewing. However, using online tools can provide strong and cost effective global marketing campaigns, as demonstrated by the success of Tourism Queensland's 'The Best Job in the World' campaign. The effectiveness of such campaigns can be maximised by ensuring:

- The timing is right
- The story is innovative, simple and authentic
- The organisation has a flexible culture to deal with a "big" campaign
- Public relations is used to distribute the message
- Good spokespeople for the company (i.e. friendly, honest and open) are used
- The company is willing to admit mistakes
- The campaign is true to the brand

Key actions:

- Capitalise on online tools for marketing and distribution
- Establish metrics and measure online marketing efforts in order to manage them
- Educate the tourism industry about online tools (particularly SMEs)
- Provide access to mentors to up-grade small businesses
- Overcome the digital lag in tourism by educating industry about online tools (particularly in SMEs)

Sustainability and Climate Change

Sustainability

Sustainability is a complex issue and its effective implementation crosses over all industries and communities. Potentially, competitive advantage in the tourism industry may become defined by the practices and principles employed to protect and benefit the environment and society (e.g. corporate social responsibility). Australia has a reputation for being among sustainable tourism leaders; this is despite the fact that, more generally, Australia is not highly regarded for its environmentalism. Tourism cannot achieve sustainability alone.

There is a need to position and build a reputation of Australia as a sustainable destination, but this is only credible if such practices are occurring. It is only possible to avoid green-wash if claims are authentic. The tourism industry, as the custodians of the Australian brand, need to attempt to create support and awareness of sustainability to develop an international reputation in this area. To be successful, it has become necessary for different government departments and industries to work together to achieve sustainable development.

A potential challenge is that tourism SMEs may not have the capacity to adopt sustainable practices, so there needs to be direct support for industry shifting towards more sustainable practices. Organisations need time to understand sustainability and adopt it at their own pace in the most effective way for their business. It was suggested that a mentor program could facilitate the adoption of sustainability as sustainable tourism operators could help others to adopt sustainable practices.

With global adoption of sustainable development there is likely to be a change in consumer behaviour, which may result in the emergence of new markets that demand authentic experiences, spiritual connections, involvement of locals, world heritage areas and simple, basic pleasures. Tourism has a potential to capitalise on this trend but developing ecotourism experiences (particularly mainstream and budget).

Key actions:

- Reduce the negatives of tourism in order to emphasise the positives
- Demonstrate new sustainable technologies
- Create transitional and legislative support from government
- Develop a base platform for sustainability, but allow regional areas to adopt particular practices relevant to them
- Consolidate information on sustainable development and climate change
- Manage locally
- Improve engagement both internationally and with environmental agencies
- Focus on reputation as a sustainable tourism destination
- Raise market awareness of operators with environmental commitment (i.e. marketing campaigns, trade education)
- Help businesses adopt Corporate Social Responsibility (CSR)
- Understand different alternatives and the impacts of taking particular trajectories
- Build capacity in organisations (e.g. flexibility and cross-skilling)

Climate Change

Climate change (or global warming) is arguably seen as the key challenge and single biggest threat for the Australian tourism industry over the long-term. While currently representing 5% of

global emissions (mainly from transport and accommodation), tourism has been gradually becoming more energy intensive, particularly as global visitation increases. In the future all industries, including tourism, will be challenged to report on their energy and broader environmental efficiencies.

Research presented at the conference indicated that global warming is resulting in more intense cyclones and storms, less regular rainfall, rising sea levels, poor water quality, loss of wetlands and changing species distribution and behaviour. Unfortunately for tourism Australia's key iconic tourism sites appear most at risk from climate change. Tourism markets, such as the Europeans, are becoming increasingly aware of climate change and have a desire to offset the impacts of travel. However, as a long-term issue, its importance has been weakened by more immediate challenges, such as the GFC.

Climate change has a range of potential implications for the sustainability of the Australian tourism industry. A change in the earth's climate has the potential to alter Australia's unique set of environmental resources, affect economic growth, and jeopardise the future viability of the tourism industry. For example, it could result in higher insurance costs, increased use of electricity for cooling, loss of natural tourism assets (e.g. Great Barrier Reef (GBR) and ski fields) and greater water use.

While there is a need for adaption, in the future the focus will be on mitigation for the long-term benefits it can provide. Simply off-setting the carbon footprint does not tackle the cause of the issue and the environment will continue to be detrimentally impacted. Long-term mitigation strategies should focus on investing in technological development and finding new fuel types (particularly in transport). In reality, the tourism sector in Australia is largely unprepared for climate change mitigation or adaptation. There is a need to "bridge the gap" between climate change statistics and action items that businesses and communities can easily implement. The industry needs incentives to uptake tools provided to help them reduce their environmental impact (e.g. emissions calculator and climate action certification).

Resources need to be used in the most effective way and this should be determined across regions and the triple bottom line (TBL). However, there are few practical TBL decision making tools that can guide regional destinations and provide on-going measurement of the reciprocal relationship between tourism and climate change. A paradox of tourism is that visitors are aware of environmental issues but to the present their behaviour remains unchanged as they expect the industry to solve the problem. It was advised that the TBL should be expanded to include visitors (the Visitor, Industry, Community, Environment (VICE) approach) to allow sustainability to be more effectively achieved by increasing visitor awareness and demand for environmental protection and social development.

Key actions:

- Effectively monitor and evaluate climate change impacts
- Increase scientific credibility and awareness that climate change is occurring in order to provide motivation to avoid risk or take up opportunities
- The tourism industry should agree on a voluntary emission reduction goal in line with other sectors
- Develop mitigation strategies

- A carbon management program for tourism should be initiated, based on various instruments
- Develop TBL impact measurements to indicate the relationship between climate change and tourism
- Establish an emission trading scheme that includes aviation
- Ensure a long-term strategic focus for the industry
- Define and clearly communicate key messages to industry on climate change

Business Events Tourism

The business events (BE) sector contributes significantly to Australia's economy by providing high-yield returns, opportunities for trade and innovation, pre and post tourism activity, repeat visitation and increased word of mouth promotion. Australia's competitive advantage in this sector is its unique meeting locations, stunning landscapes, rich history of cultural freedom and innovative industry (e.g. Melbourne's new convention centre which set new standards in environmental design and practices).

While there has been good growth and development in the sector in the past, more recently Australia has been losing market share in the global meetings sector (particularly to Asian destinations) and inbound convention figures have declined since the GFC. The GFC has particularly affected 5 star hotels which has indirectly impacted on all types of BE providers as competition and discounting has intensified. As a result return on investment (ROI) has become a key issue (the new "black") for the BE sector.

Key opportunities for the future include developing business hubs, buying and creating business and growing markets such as Asia, environmental sciences, defence, government, education and research, mining, agriculture, aerospace and health and community services. It will be important to develop and maintain links with organisations such as government and universities to guarantee business events are retained within Australia. While there has been huge growth in association meetings in Australia, the size of the associations and Australia's market share in this sector has been falling. There is a potential to increase the number of associations that have Head Offices in Australia thereby indirectly increasing the number of meetings hosted in Australia.

Business event consumers are becoming savvier and with increased global competition it has become gradually more difficult to attract and maintain business. A looming threat facing the sector over the long-term is the increasing use of technology for communication (such as, virtual meetings, video conferencing and tele-presence) which reduces the need for face to face interaction. Other future challenges identified by the BE forum were:

- Developing a more integrated national BE strategy
- Separating BE marketing from leisure marketing (i.e. separate business brand)
- Developing collaboration with the tourism sector (i.e. hotels)
- Creating initiatives to facilitate corporate social responsibility (CSR)
- Connecting with the multiple layers of government
- Maintaining best practice
- Overcoming regionalisation which has seen Australia miss out on regional growth in the US and Europe (regional rotation is not automatic)
- Maintaining competitive advantage against strong international competition i.e. Asia

Key actions:

- Ensure ongoing communication and collaboration between stakeholders
- Undertake research across countries to predict changes and pre-empt problems (i.e. delegate expenditure surveys)
- Continually monitoring performance of individual operations
- Have a skilled and dedicated workforce focused on maintaining best practice
- Develop appropriate infrastructure, such as accommodation
- Maximise technology and research / development to gain advantages
- Balance business from associations and the corporate sectors to ensure greater stability
- Develop authenticity and social and environmental responsibility
- Link BE with science and innovation
- Maximise secure business i.e. pre / post tourism, study tours and regional dispersal
- Align business events with economic development and government priorities

Destination Management – Policy and Development

Leadership

In reality, many of the issues discussed at the conference (i.e., marketing, sustainability and business events) can all fit neatly under the destination management umbrella. The conference delegates identified a paradigm shift in the tourism industry over the past decade which follows conclusions of an earlier Sustainable Tourism Cooperative Research Centre (STCRC) report (McLennan, 2009). There are strong signs of maturity in the industry's leaders' thinking, including a shift from destination marketing towards destination management, less discussion of fragmentation, more highly educated leaders, solid business networks and increased collaboration.

Fundamentally, tourism is a private business activity as it has primarily been developed through entrepreneurial activities and private capital. The industry wants viable businesses to generate income and maintain livelihoods, but achieving long-term sustainability is also a priority. The conference delegates recognised that sustainable destination management is required for the industry to be successful over the long-term. While the leadership is in place, action is now required to lead the industry towards implementing the strategy. It was indicated that the NLTTS needs to learn from past mistakes to deliver strong leadership and provide solid strategic plans for the next ten years.

Key actions:

- Clarify industry needs and requirements
- Ensure a clear, collaborative and engaging national vision
- Pre-plan and learn from mistakes and other destinations
- Balance supply and demand
- Consider impacts across the TBL
- Ensure investment is occurring, infrastructure is in place and a quality experience is being delivered
- Undertake monitoring and performance measurement to ensure that excellence in policy and destination management is being achieved

Policy Development and Regulation

The Australian government is relatively proactive in the development of tourism, although there are areas which could be improved and strengthened. Although tourism will always share a minister with other portfolios, it was seen as essential for the industry that a tourism minister is in cabinet. A key challenge is that traditionally there is little pure tourism policy, with tourism generally providing input into other department's policy. It is important to develop regional plans that identify the best tourism opportunities as they are powerful tools for supporting plans when working with local, state and federal government.

An important strength of the tourism industry is that it is not dependent on the government and this separation needs to be maintained. Tourism is multi-sectoral and often fragmented and the industry associations have worked hard in the past to create cohesion. However, they continue to lack political strength. The industry needs to work together and support the associations' advocacy of tourism. A clear message should be presented to government that tourism provides good economic return, stimulates job growth, facilitates migration and has the skills and products required to deliver returns.

Presenters suggested that Australia has become heavily regulated over the past 20 years, particularly when compared to Asian countries which are becoming increasingly flexible. Town planning was viewed as a major regulatory barrier to tourism as it has made investment in tourism businesses extremely difficult, especially for SMEs in regional areas. It was noted that the private sector cannot be relied upon to undertake investment and that regulation limits entrepreneurial activity and innovation. Investment and innovation could be facilitated by deregulation, overcoming regulation problems, streamlining regulation, increasing ongoing monitoring or regulating on a project-by-project basis.

Key actions:

- Align tourism vision to key government priorities
- Determine national objectives and targets
- Develop destination plans including innovation, investment and infrastructure planning i.e. Tourism Queensland's Tourism Opportunity Plans (TOPs)
- Overcome regulatory issues preventing tourism entrepreneurship

Crisis Management

Tourism is constantly coping with and adapting to external impacts, such as climate change, globalisation, the GFC and demographic and social change. Fortunately, the Australian tourism industry is dynamic and adaptive and has, thus far, remained relatively resilient. However, conference delegates recognised a need to improve crisis management, particularly at the local destination level. Presenters highlighted that the main issue is managing people's perceptions of the crisis and maintaining reputation. Implementing crisis management should ensure that destinations are prepared for a range of crises by having detailed contingency plans in place and ensuring quick response times (within the hour). It is important to use isolation strategies and to provide credible information about the crisis and its implications.

Key actions:

- Develop risk assessments for tourism at the regional and local level
- Proactively develop strategies aimed at managing potential future cyber attacks (i.e. protecting data) and possible sea piracy (i.e. may impact on cruise ships).
- Provide incentives for the industry to adopt the strategies

Aviation

The aviation sector is vital for developing new international markets. Presently the sector is continuing business under the low cost carrier model and there is push to expand capacity, the number of flights and flight routes. There was some support for changing the aviation model as low cost fares were not viewed as sustainable, and aviation generally is increasingly seen as detrimental to the environment. To offset environmental issues, it was suggested that aviation should adopt a “pay or avoid” scheme, however this could decrease tourism activity, isolating rural communities and creating a greater divide between urban and rural communities. Despite energy and sustainability issues, the tourism industry clearly intends to continue to develop aviation technologies and efficiencies as aviation, among all transport options, enables ready access to destinations and ensures ongoing viability of businesses.

Key action:

- Ensure good relationships between the Australian tourism industry, domestic / international airlines and government in to facilitate aviation development

A High-Yield or High-Volume Pricing Model

A key debate at the conference was whether the industry should follow a yield or high volume (value for money) pricing model. A number of presenters argued for a yield model as it facilitates sustainable development and reduces infrastructure stress. They also noted that a yield model should be maintained even during recession as discounting weakens branding and can make it difficult to increase prices later. A problem with this strategy, particularly in mass tourism destinations shifting to such a model, is that this market is smaller and seeks a different type of product. Therefore it will result in structural change in the industry, with decline for some businesses. However, economic impact will remain high and negative impacts on the environment will be lower. Such an approach was seen as a key strategy in the face of long-term climate change and sustainability issues.

Others postulated a high-volume model arguing that industry is currently struggling financially, that visitation has been declining over the long-term and that the high-yield model has contributed to the cultural change in Australia that has seen domestic tourism decline. For example, in the future, the Gold Coast is aiming to refocus on its traditional family image and domestic tourism by focusing on its strengths while still aiming to grow new markets such as China and India which are looking for value. Despite this, the Gold Coast tourism industry leaders believe that it is still necessary to attract high yielding visitors. Taking a diverse strategy will often dilute the marketing message and brand; however adopting many-to-many marketing may overcome this.

Key action:

- Clarify the best approach for Australia and ensure the product matches marketing

Research and Performance Measurement

Industry learning is critical for on-going development and research is the most effective tool to aid the learning process. Research was highlighted as an important issue and there were some concerns that this area will suffer, particularly if the STCRC is unable to secure ongoing funding. The conference delegates indicated that there is a need for government and industry to link more closely to academia in order to gain access to high quality, rigorous and peer-reviewed (credible) research and to ensure it is more relevant to the industry's needs.

Key actions:

- Develop better metrics and indicators for assessing performance across the TBL (don't just look at economic factors or carrying capacity)
- Undertake ongoing performance measurement, monitoring and review (to identify problems early and to prove outcomes)
- Work with tourism operators to gain cost effective data (e.g. GBR research)
- Ensure data is centralised, shared and accessible
- Undertake additional forecasting to provide insights into the potential future
- Determine how to make destinations more efficient and effective
- Undertake consumer research – understand needs, wants and trends
- Ensure data collection and analysis is rigorous and consistent
- Improve communication between scientists and the tourism industry in order to develop scenario building and risk assessment
- Focus on local and regional levels
- Undertake comparative studies with international destinations
- Investigate what 'green practices/products' are expected by target visitor segments

Investment

Currently the supply-side of tourism is struggling with recession, low ROI, and a lack of capital and investment which has seen the focus shift back towards increasing tourism demand and marketing. Conference discussions indicated that operating in cities is currently easier than in regional areas as it is easier to attract staff and visitors. However, investment was viewed as an issue for both regional and urban areas, although their future challenges vary. For example, in popular urban destinations the approaching issue will be that the industry has capital for investment, but not the land for development. The rural dilemma is almost in direct contrast.

Ensuring good ROI and improving business viability is critical for increasing confidence in the industry and ensuring ongoing investment in tourism. A key issue with ROI in tourism is that it often flows on to external agents, for example a larger proportion of tourism spend may go to the producers' associated suppliers, rather than to the tourism industry itself. Tourism is also often perceived as high risk and so private investors and banks may be reluctant to invest in the industry. Interestingly, perceptions of the tourism industry seem to be the key in overcoming issues with investment. For example, it was argued that the issue for the Gold Coast is that it is perceived by markets as unchanged and old. This was attributed to a lack of investment despite acknowledgement that the Gold Coast has recently had large investments made in tourism (i.e. the Gold Coast Convention Centre, sports stadiums and aviation etc.). Thus the issue is more perception, rather than a lack of investment capital.

It was suggested that investment will be driven by industry associations (i.e. TTF) and policy in tourism departments in order to facilitate a good mix of public and private sector investment.

Generally the public sector should only step in when the market fails and investment is not occurring (this rarely occurs in popular urban destinations). Conference delegates acknowledged that it will never be possible to get enough funding to invest in all destinations for all products. While, it was argued that it is not possible to create an artificial investment climate it was suggested that government should provide incentives and reduce complex regulation to enable the private sector to undertake investment.

Key actions:

- Ensure that there is good ROI (financial yield)
- Identify who are likely to be the next generation of investors
- Prioritise investments by ranking across regions and the TBL

Infrastructure

While Australia has a pool of diverse tourism products and infrastructure, there are a number of apparent tourism infrastructure gaps that need to be closed through public and private investment. These gaps have occurred as:

- Responsibility of infrastructure is split over a range of state and federal departments
- Tourism is generally not considered during the regional planning process
- There are a number of emerging tourism markets which require different types of infrastructure
- Tourism is generally a second order consideration

Conference delegates suggested that infrastructure requirements should be determined on a destination level as infrastructure gaps and capacity constraints vary across regions.

Key actions:

- Develop airports, roads, cruise ship terminals and basic facilities to cater for tourists
- Develop capabilities to improve quality and environmental protection

Innovation

Innovation was a key theme of the conference across all forums. It was considered as necessary in order for the tourism industry to:

- Progress
- Remain competitive
- Build capacity
- Facilitate growth
- Continue to be viable in the future
- Provide solutions i.e. to meet new demand, revive old products and deal with sustainability / climate change.

The tourism sector, in general, is quite conservative when it comes to innovation. As entrepreneurs are drivers of innovation, it is necessary to create an entrepreneurial culture in the tourism industry.

Key actions:

- Facilitate and support entrepreneurs to take on new trends
- Encourage collaboration and information exchange to stimulate the innovation process

- Minimise risk associated with innovation

Budgetary Issues

A key issue for the Australian tourism sector is budgetary constraints. This is a critical issue as there are global competitors with increasingly larger budgets. Currently the industry is struggling to determine the best allocation of scarce resources, particularly in areas such as infrastructure development, marketing and business tourism. This is due to a large number and diverse range of stakeholders. As a result public agencies having been trying to do more with less and outcomes have not been effective.

It was proposed that a way to overcome budgetary constraints was to focus investment on 'top destination's' (i.e. front-stage [major regions] / back-stage [smaller regions] approach). The aim would be to develop access to Australia to deliver more tourists to destinations. This strategy would be appropriate if marketing, infrastructure and sustainable practices are in place to deliver and support increased visitation.

By focusing on larger destinations, however, there is a potential to create a highly urban tourism experience. It needs to be considered whether this is the correct tact for Australian tourism and whether it is the message that has been marketed as the Australian experience. Focusing on 'front-stage' destinations may indirectly lead to urban drift and rural social problems as tourism jobs decline in regional economies. In many regional areas tourism is viewed as a way to supplement declining agriculture, halt 'out-migration' and maintain the rural lifestyle. Furthermore, taking such inadvertently focuses on larger organisations.

One discussion during the destination management forum identified that industry often speaks to government in terms of economic metrics. When queried about why lobbyists' focus only on economic factors when the TBL is well ingrained into industry knowledge, the response was that "Treasury will only listen to the economic benefits". This indicates a need for a fundamental change of thinking in government. If some sectors of the economy are working towards sustainability, they should be measured in terms of the TBL when they seek budgets. Otherwise sustainability will never be fully adopted and taking a sustainable approach in tourism would not be effective and possibly detrimental.

Key actions:

- Lobby government for funding and support
- Ensure marketing spend is focused on viable target markets
- Undertake quarterly reviews to determine where scarce budget resources would be best allocated
- Determine opportunities and priority areas for development (e.g. ecotourism, aviation)
- Generate resources from both government and private stakeholders
- If a sustainable approach is adopted, ensure tourism is measured and funded based on the TBL

Skill Shortages

Tourism workforce skills were discussed as an issue for the future, with skill gaps being identified in both tourism and hospitality. While the economic crisis has increased the number of available skilled staff, when the economy recovers the industry is likely to once more face a

skills shortage. Indeed, the GFC has seen organisations reduce training initiatives which has implications for quality and repeat visitation over the long-term.

It's become critical to develop a skills culture in the Australian tourism industry and ensure that there is access to training, career paths and performance recognition. Tourism associations, such as QTIC and Tourism Queensland, have begun to work towards overcoming this challenge with initiatives such as "Fire and Ice" and other training and mentorship programmes. It is essential that these initiatives are being utilised and are linked together nationally to increase their effectiveness and ensure they provide flexible outcomes. A skills culture could also be facilitated by increased collaboration between education providers and industry and the implementation of a national skills strategy.

Key actions:

- Work with industry to determine how to attract and maintain skilled staff
- Develop the industry's awareness of the importance of training
- Prioritise skills and leadership development requirements
- Develop strategies to retain staff and tourism organisations in the industry for longer (important for long-term operations and continual improvement of the industry)
- Ensure there is exposure of SMEs to the workforce
- Determine what skill gaps are present across the industry
- Develop a skills culture and link initiatives nationally
- Engage with universities and tourism students to ensure that the most appropriate skills are being developed

Bottom-up Approach with a National Vision

There was a call for a national vision with clear actions at the national, state, regional and local level. While, sustainability issues (such as climate change) are yet to be a priority at the executive level of Australian businesses or across all departments of government, globally they have become a key trend. Adopting sustainable development has become essential for long-term viability and maintaining competitive advantage. It was suggested that the vision for the future should be to position and build a reputation of Australia as a sustainable destination. This would be most effectively achieved by adopting a decentralised business-by-business approach (i.e. micro-solutions) as it would deliver more flexible and spatially relevant regulation and actions. There must be regional and government commitment to adopting sustainability or the approach will not be effective. It is important to define and communicate key messages to industry on sustainable issues, provide them with practical advice and offer incentives and justification for adopting sustainable practices.

Key actions:

- Ensure a clear national vision and communicate a collective message
- Consolidate information on sustainable development
- Identify and capitalise on the unique features and experiences of a destination

Collaboration and Whole of Government Approach

A significant challenge for tourism is that it has multiple stakeholders, crosses over a number of different industries and is often fragmented. Generally, destinations which work together under a single vision are successful in tourism (e.g. Melbourne City, VITC). Collaboration

brings industry together (reduces fragmentation) and raises the profile and the voice of the tourism industry. Concepts of collaboration, communication and clear visions need to be a fundamental part of destination management. This should include industry, community, all levels and departments of government.

Effective collaboration amongst the tourism industry requires sectoral approaches and finding champions as the industry tends to learn more effectively from one another, rather than being directed by government. Industry needs to support industry associations (i.e., TTF and ATEC) to help advocate tourism with government to achieve funding and sustainable outcomes. Involving both industry and government in the development of strategic plans is important to ensure ownership of strategies. It is necessary to work with government at all levels as government recognition and support is the key for the industry's on-going development, especially as it shifts to a sustainable development platform.

The main problem occurs at the federal level where tourism crosses over many different departments and so is not a particular priority. However there is a need for consistency of policy by adopting a 'Whole-of-Government' approach, particularly for infrastructure development, sustainable tourism and budgetary issues. It must be recognised that tourism is not just marketing, but can significantly benefit the economy, community and environment.

Key actions:

- Develop networks in each state (i.e. operators, developers, destinations)
- Engage the consumer and stakeholders i.e. use technology (social networking sites)
- Ensure collaboration and communication between the regional and national level
- Strengthen regional networks and interaction
- Ensure tourism continues to collaborate with other industries
- Promote the industry to markets and government with a consistent message
- Undertake cooperative marketing and branding

Community Engagement

The destination management forum highlighted that the community must be considered when using tourism as a tool for economic development. Engaging and educating the community about tourism and sustainable development was seen as critical. It was also suggested that the community needs to have greater involvement in tourism to ensure that development maximises the benefits to them and does not impose initiatives which are detrimental to the regions social norms. A community jury was proposed as a good way to involve the community as it would ensure tourism projects are community owned and could help identify and maximise opportunities in particular regions.

Tourism is viewed as a tool to aid indigenous development and maintain the indigenous culture. The indigenous people view tourism as an important story teller that facilitates communication, enables the exchange of cultural information and breaks down cultural barriers. Tourism benefits indigenous people by offering them a tool to become independent and develop skills and experience (including traditional skills). An issue is that indigenous tourism businesses are often high risk ventures and require support, particularly in the initial stages of development. It was indicated that urban Australians need to gain a greater understanding of and change their attitudes towards indigenous and rural communities. This can be facilitated by encouraging

tourism activity to these communities which would also help these communities achieve independence and maintain their lifestyles.

Key actions:

- Examine potential of 'community juries'
- Encourage domestic tourism into indigenous and rural areas

Conclusion - A Challenging Future – faced with optimism

The industry is generally optimistic about the future, and sees itself as resilient. Indeed, many conference attendees noted that “tough times” are generally the best opportunities for revising industry strategies and implementing more effective and innovative plans for the future.

Conference discussion and workshops indicated a growing paradigm shift in the minds of Australia’s tourism industry leaders, with emphasis shifting towards destination management as the core area for focus. Conference delegates identified that the tourism industry has matured over the past decade with stronger leadership in place and better cohesion. Notwithstanding, considerable challenges remain.

A key debate at the conference was whether the industry should follow a yield or high volume (value for money) pricing model. Such an approach was seen as the key strategy dimension in the face of long-term climate change and sustainability issues. Other participants postulated a high-volume model arguing that industry is currently struggling financially, that visitation has been declining over the long-term and that the high-yield model has contributed to the cultural change in Australia that has seen domestic tourism decline. Resolution of this debate and its implications for destination Australia and all aspect of tourism planning, management and marketing will be central to the NLTTTS and its implication.

The conference delegates observed that the Australian tourism industry is adaptive and dynamic which will allow it to make the changes needed to fully adopt leading-edge sustainable tourism destination management over the coming decade. However it was evident that this requires good strategic planning, research, innovation, leadership, a balance between supply and demand, a collaborative and “Whole-of-Government” approach and an understanding of and view towards the future.

Table 1 Key actions and priority areas for Australian tourism over the next 10 years

<p>Consumer Research & Market Winning Insights</p> <ul style="list-style-type: none"> • Use language trends in marketing • Review Australia’s destination image to ensure it creates demand • Stay on top of trends - know the market & which trends are impacting on them • Flexible skills, a skills culture & accreditation • Undertake customer satisfaction research & seek out feedback • Offer more than an experience: make memories, enhance learning, provide meaning, deliver personal satisfaction & offer chance for visitors to participate & contribute • Develop Australia’s National Landscapes • Use psychographic segmentation • Use expertise in segmentation to make decisions & shape tourism activity • Stimulate the domestic market • Offer value for money & help people budget for holidays • Make it easier to plan holidays • Highlight the importance of spending time together • Give people a reason to holiday i.e. events & festivals • Give people the ability & incentives to take time off • Encourage leave through well-designed embedded policy • Develop the short-break market <p>Business Events Tourism</p> <ul style="list-style-type: none"> • Ensure ongoing communication & collaboration between stakeholders • Undertake research across countries to predict changes & pre-empt problems • Continually monitoring performance of individual operations • Have a skilled & dedicated workforce focused on maintaining best practice • Develop appropriate infrastructure, such as accommodation • Maximise technology & research / development to gain advantages • Balance business from associations & corporate to ensure greater stability • Develop authenticity & social & environmental responsibility • Link BE with science & innovation • Maximise secure business • Align business events with economic development & government priorities 	<p>Sustainability & Climate Change</p> <ul style="list-style-type: none"> • Reduce the negatives of tourism in order to push the positives • Ensure a long-term strategic focus for the industry • Demonstrate new sustainable technologies • Create transitional & legislative support from government • Develop a base platform for sustainability, but allow regional area’s to adopt particular practices relevant to them • Consolidate information on sustainable development & climate change • Manage locally • Improve engagement both internationally & with environmental agencies • Focus on reputation as a sustainable tourism destination • Raise market awareness of operators with environmental commitment (i.e. marketing campaigns, trade education) • Help businesses adopt CSR • Understand different alternatives & the impacts of taking particular trajectories • Build capacity in organisations • Effectively monitor & evaluate climate change impacts • Increase credibility & awareness that climate change is occurring to provide motivation to avoid risk or take up opportunities • Develop mitigation strategies • Establish an emission trading scheme that includes aviation • The tourism industry should agree on a voluntary emission reduction goal in line with other sectors • A carbon management program for tourism should be initiated, based on various instruments • Develop TBL impact measurements of relationship between climate change & tourism • Define & clearly communicate key messages to industry on climate change <p>Tourism Online – Marketing & Distribution</p> <ul style="list-style-type: none"> • Capitalise on online tools for marketing & distribution • Establish metrics & measure online marketing efforts in order to manage them • Educate the tourism industry about online tools • Provide access to mentors to up-grade small businesses • Overcome the digital lag in tourism by educating industry about online tools
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<p>Destination Management – Policy & Development</p> <ul style="list-style-type: none"> • Clarify industry needs & requirements • Ensure a clear, collaborative & engaging national vision • Pre-plan & learn from mistakes & other destinations • Balance supply & demand • Consider impacts across the TBL • Ensure investment is occurring, infrastructure is in place & a quality experience is being delivered • Undertake monitoring/performance measurement to ensure excellence in policy & destination management • Align tourism vision to key government priorities • Determine national objectives & targets • Develop destination plans including innovation, investment & infrastructure planning • Overcome regulatory issues preventing tourism entrepreneurship • Develop regional/local risk assessments for tourism • Proactively develop strategies aimed at managing potential future cyber attacks & possible sea piracy • Provide incentives for the industry to adopt the strategies • Ensure good relationships between the Australian tourism industry, domestic / international airlines & government in to facilitate aviation development • Clarify the best approach for Australia & ensure the product matches marketing • Develop better metrics & indicators for assessing performance across the TBL • Undertake ongoing performance measurement, monitoring & review • Work with tourism operators to gain cost effective data • Ensure data is centralised, shared & accessible • Undertake forecasting to gain insights into the future • Determine how to make destinations more efficient & effective • Undertake consumer research – understand needs, wants & trends • Ensure data collection/analysis is rigorous & consistent • Improve communication between scientists & the tourism industry to develop scenario building & risk assessment • Focus on local & regional levels • Undertake comparative studies with international destinations • Investigate what ‘green practices/products’ are expected by target visitor segments Ensure that there is good ROI • Identify the next generation of investors • Prioritise investments by ranking by regions & the TBL • Develop airports, cruise ship terminals & basic facilities to cater for tourists 	<ul style="list-style-type: none"> • Develop capabilities to improve quality & environmental protection • Facilitate & support entrepreneurs to take on new trends • Encourage collaboration & information exchange to stimulate the innovation process • Minimise risk associated with innovation • Lobby government for funding & support • Ensure marketing spend is focused on viable target markets • Undertake quarterly reviews to determine where scarce budget resources would be best allocated • Determine opportunities & priority areas for development • Generate resources from both government & private stakeholders • If a sustainable approach is adopted, ensure tourism is measured & funded based on the TBL • Train industry on how to attract & maintain skilled staff • Develop industry’s awareness of importance of training • Prioritise skills & leadership development requirements • Develop strategies to retain staff & tourism organisations in the industry for longer • Ensure there is exposure of SMEs to the workforce • Determine what skill gaps are present in the industry • Develop a skills culture & link initiatives nationally • Engage with universities & tourism students to ensure that the most appropriate skills are being developed • Ensure a clear national vision & communicate a collective message • Consolidate information on sustainable development • Identify & capitalise on unique features of destinations • Develop networks in each state • Engage the consumer & stakeholders • Ensure collaboration & communication between the regional & national level • Strengthen regional networks & interaction • Ensure tourism continues to collaborate with other industries • Promote the industry to markets & government with a consistent message • Undertake cooperative marketing & branding • Develop a system of ‘community juries’ • Encourage domestic tourism to indigenous & rural areas
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