

Tourism Futures

NATIONAL CONFERENCE

Secretariat, GPO Box 2301, Brisbane QLD 4001 Ph: +61 7 3012 9575 Fax: +61 7 3012 9576 info@tonycharters.com www.tourismfutures.com.au

Tourism Futures National Conference 2008

Issues Analysis

Prepared by
Tony Charters and Associates

Initiated by Tourism Queensland, proudly sponsored by



VeryGC
VERY GOLD COAST



ABN 224689 87596

Contents

Introduction	1
1.0 Sector Composition of Delegation	2
2.0 Issue Categories	3
3.0 Policy	4
4.0 Marketing	5
4.1 Promotion and Communication	6
4.2 Product	7
4.3 Target Market	8
4.4 Price	9
4.5 Marketing Strategy	10
5.0 Education and Workforce Futures	11
6.0 Investment	12
7.0 Climate Change	13
8.0 Transportation / Aviation	14
9.0 Summary	15

Introduction

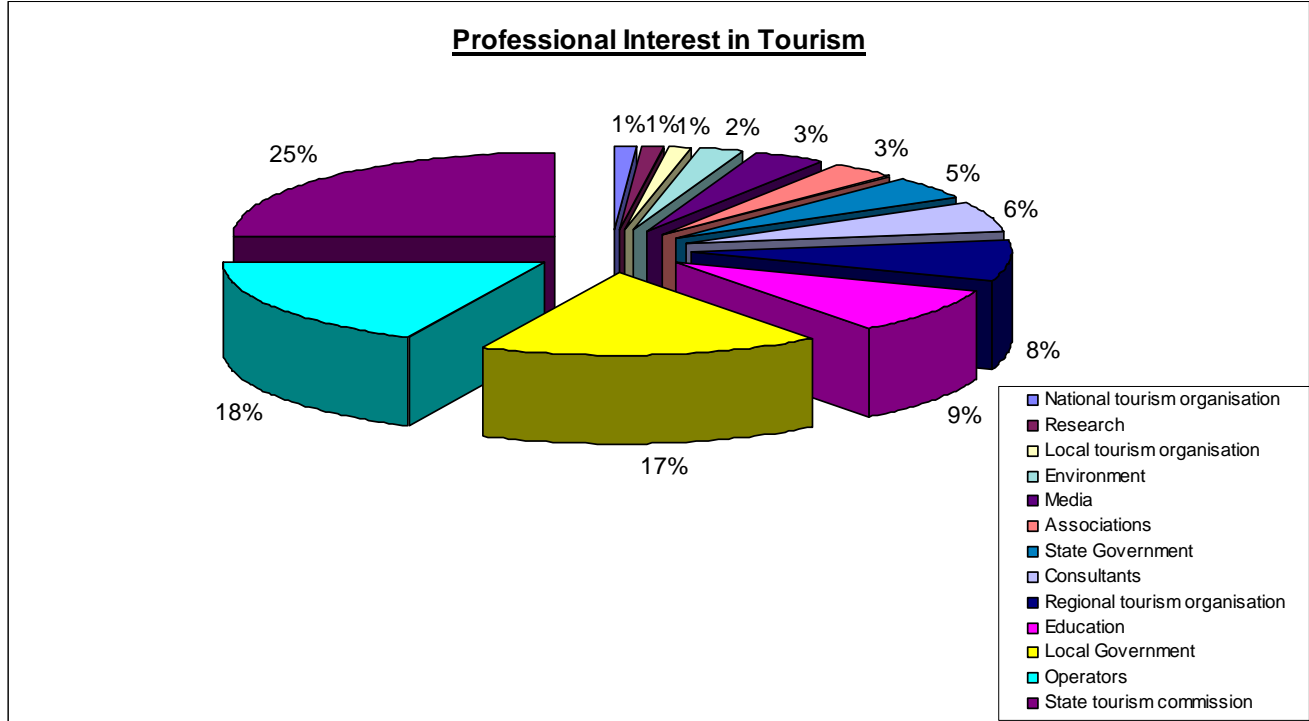
The Sixth National Conference on Tourism Futures was an opportunity for operators, policy makers, academics and tourism professionals to discuss, debate and address the challenges and opportunities for the future of Australia's tourism industry. The theme of the conference was *Global Market, Competitive Edge*, with sub themes emphasising topics including *Tourism Technology and Distribution, Access and Transport, Product Development, Workforce Futures, Climate Change and Sustainability, and Marketing and Research*.

During the morning plenary workshop, Wayne Kayler-Thomson, as facilitator asked delegates to nominate on paper the three key issues that they felt should be addressed to the National Tourism Strategy (NTS) in order to deliver positive tourism futures.

This report details the issues raised by delegates.

1.0 Sector Composition of Delegation

A total of 114 delegates responded, (41% of the delegation). The following graph shows the profile of respondents who participated to the survey.

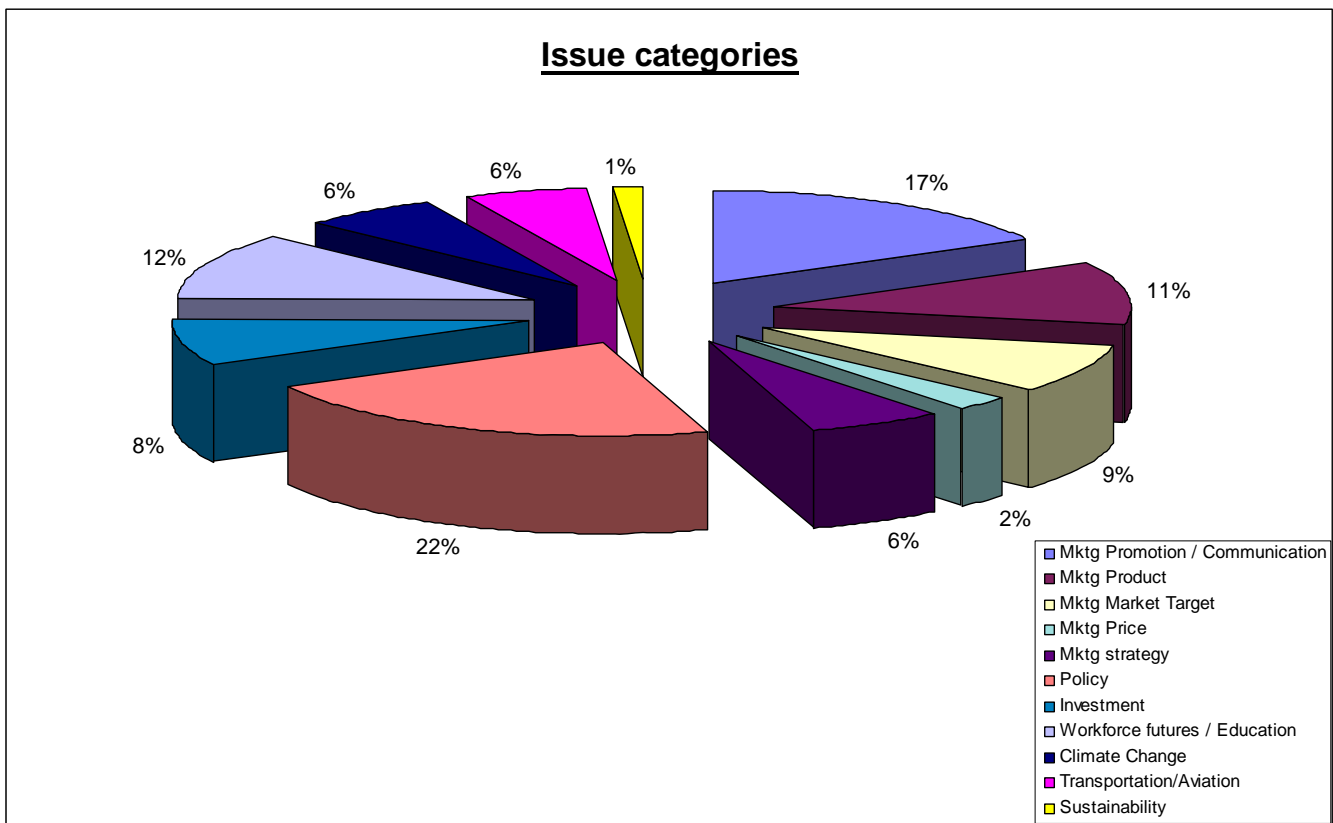


2.0 Issue Categories

Delegates indicated they would like to see the NTS address eleven separate overarching issue categories.

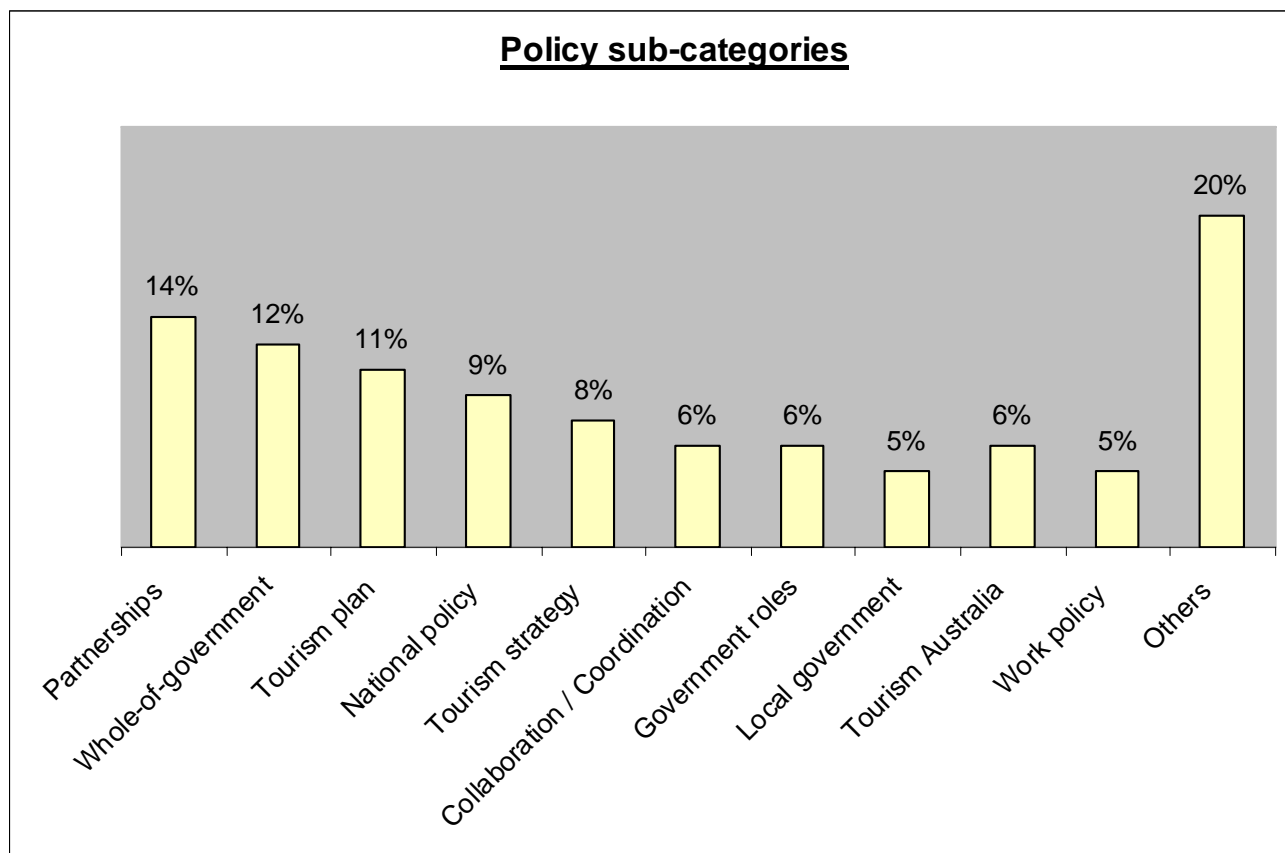
The most important issue categories for respondents are the Policy (58%), Marketing Promotion/Communication (45%), Workforce Futures/Education (31%), Marketing Product (29%), Marketing Market (23%) and Investment (18%).

Respondents also expressed interest in Climate Change (16%), Marketing Strategy (16%), Marketing Price (6%) and Sustainability (4%).



3.0 Policy

Policy was recognised as an issue the NTS needs to address with 66 identified issues (58%) and 10 discreet categories as listed below.



A large number of respondents (14%) showed that Partnership in Private and Public Industry is an important issue for the NTS.

“Whole-of-government” was one of the main topics (12%) which involves all layers of government working more in unison.

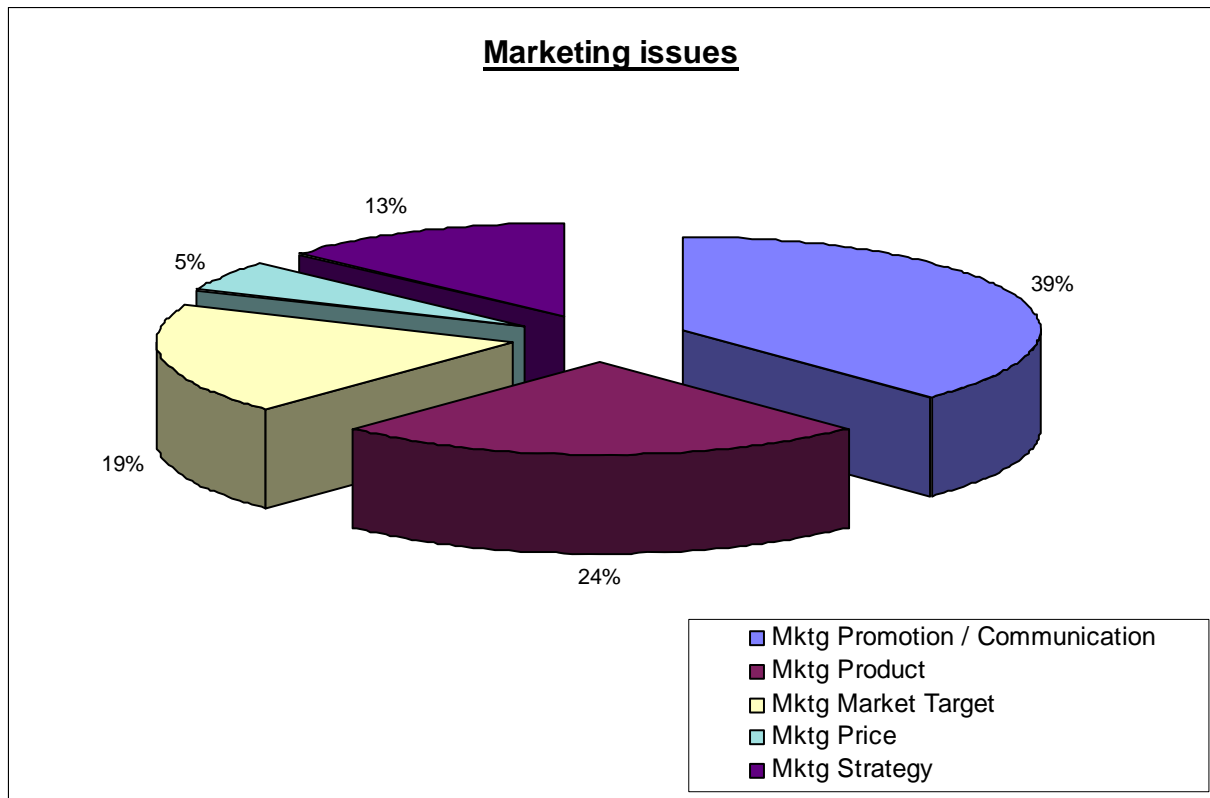
Tourism plan (meaning planning approaches that should be adopted) was nominated by 11% of delegates, National Policy (9%) and Tourism Strategy (8%) were also noticed as key issues.

Collaboration/Coordination between Government and Industry (6%), Government Roles (6%) and especially Local Government (5%), Tourism Australia (6%) and Work Policy (5%) were represented as issues.

Other subjects (20%) had been approached as Leadership and Lobby in Industry and Government, National Park or Tourism contribution.

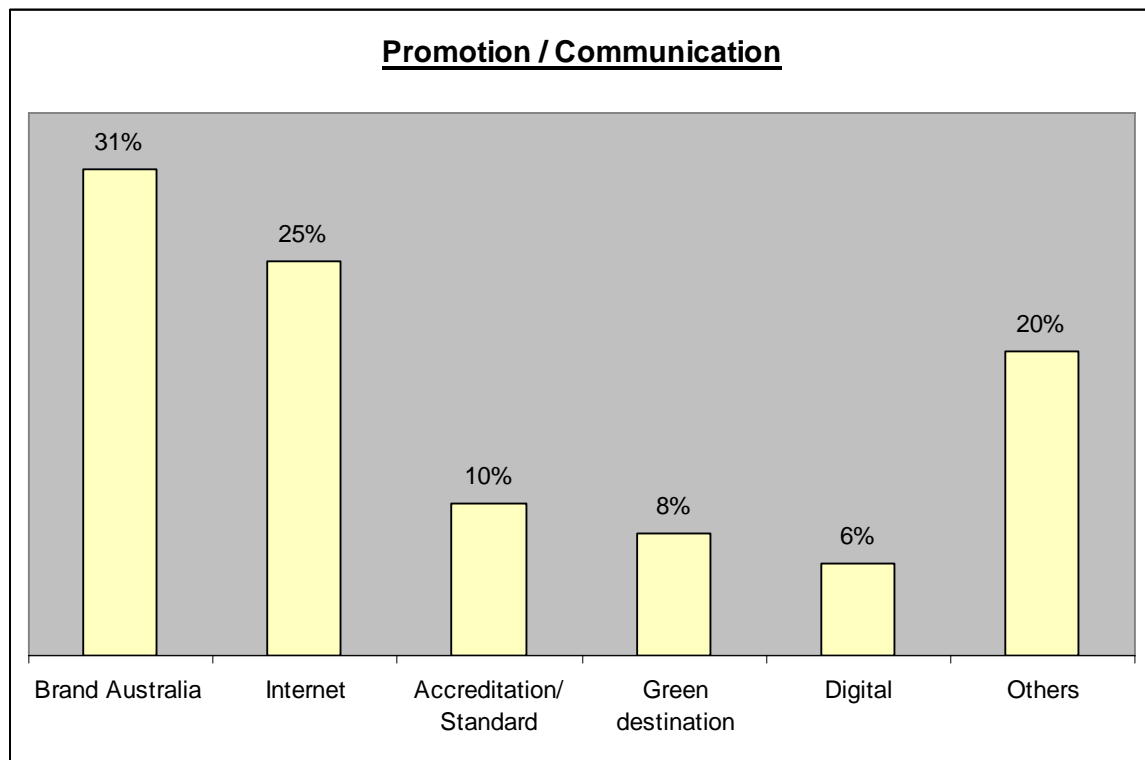
4.0 Marketing

Marketing was recognised as an issue the NTS needs to address (44%) with 5 discreet categories including Promotion/Communication, Product, Market, Price and Strategy.



4.1 Promotion and Communication

Marketing promotion and communication was recognised as an issue the NTS needs to address (45%) with 51 identified issues and 5 discreet categories as listed below.



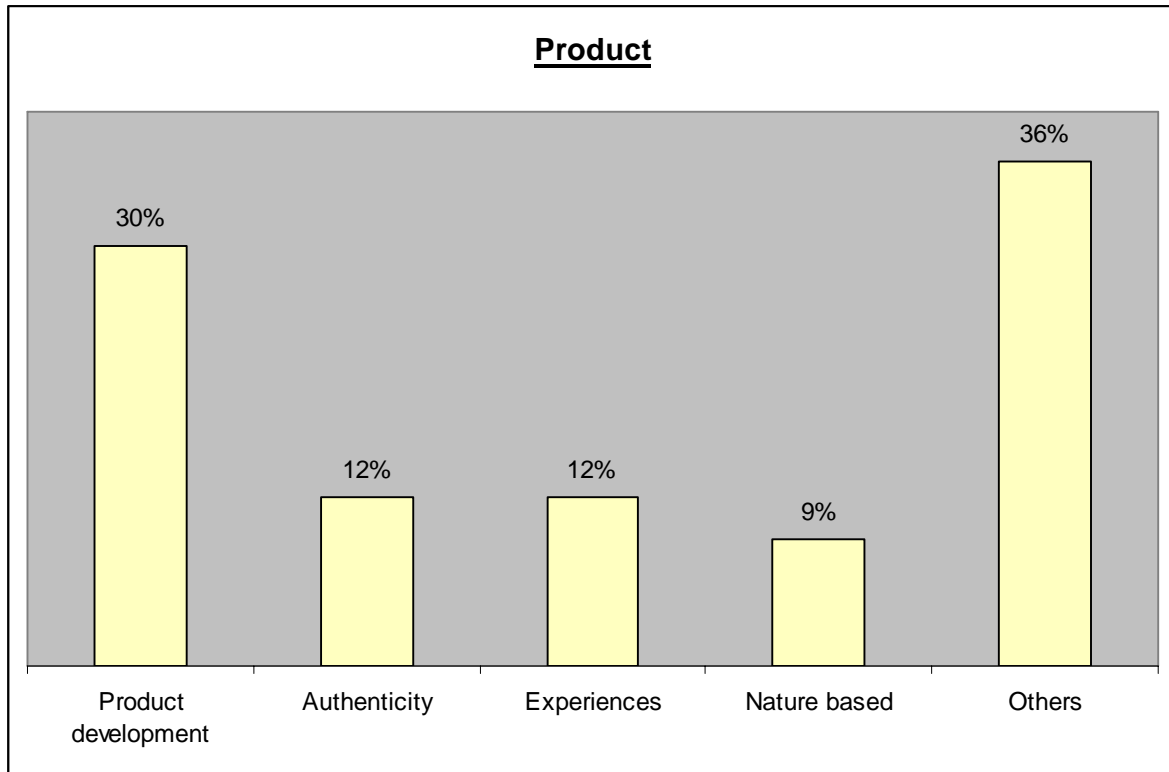
Developing “Brand Australia” (31 %) and using more Internet tools (25%) in marketing approach were the most important issues.

Promote and develop Accreditation/Standard (10%), communicate about Australia as Green destination (8%) and use more Digital communication (6%) were also mentioned.

Other subjects have been represented as communication development.

4.2 Product

Marketing product recognised as an issue the NTS needs to address (29%) with 33 identified issues and 4 discreet categories as listed below.



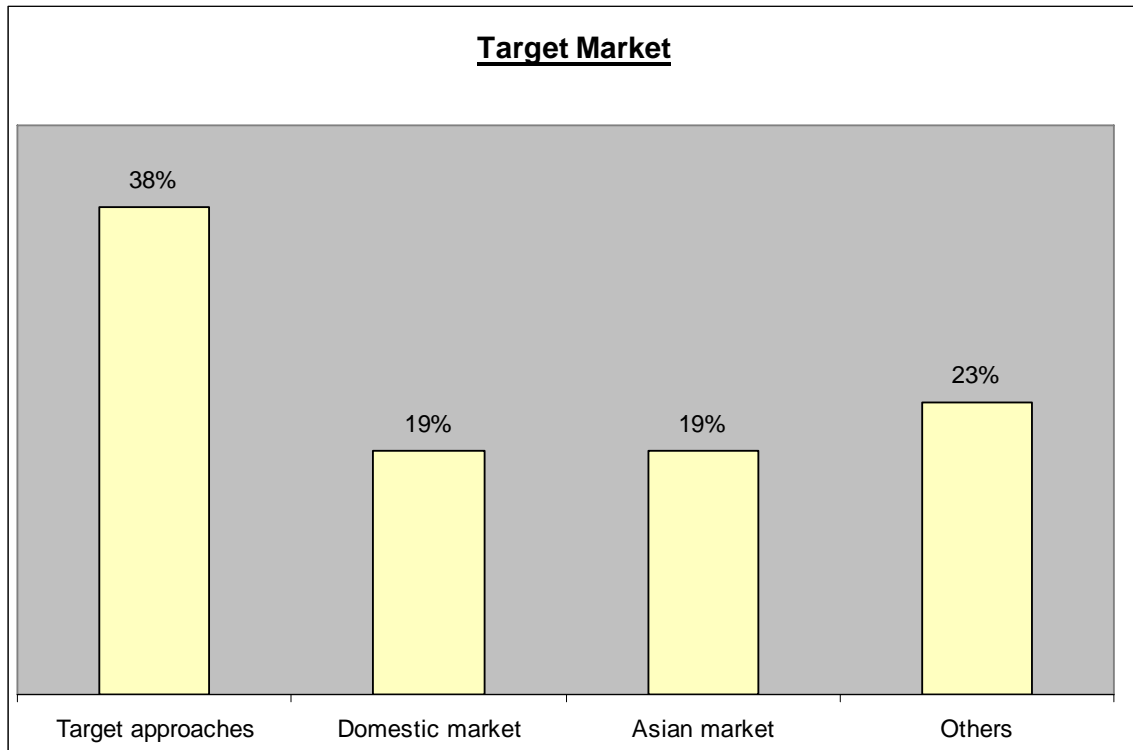
Product development (30%) is the main subject that respondents would like to see the NTS address. They pay particular attention to the development of new products and improvement of Eco and Indigenous products.

Authenticity (12%), Experiences (12%) and Nature-based (9%) were important features as well.

Concerning other issues linked to the product; developing accommodation quality, differentiating the product and developing packages were also nominated.

4.3 Target Market

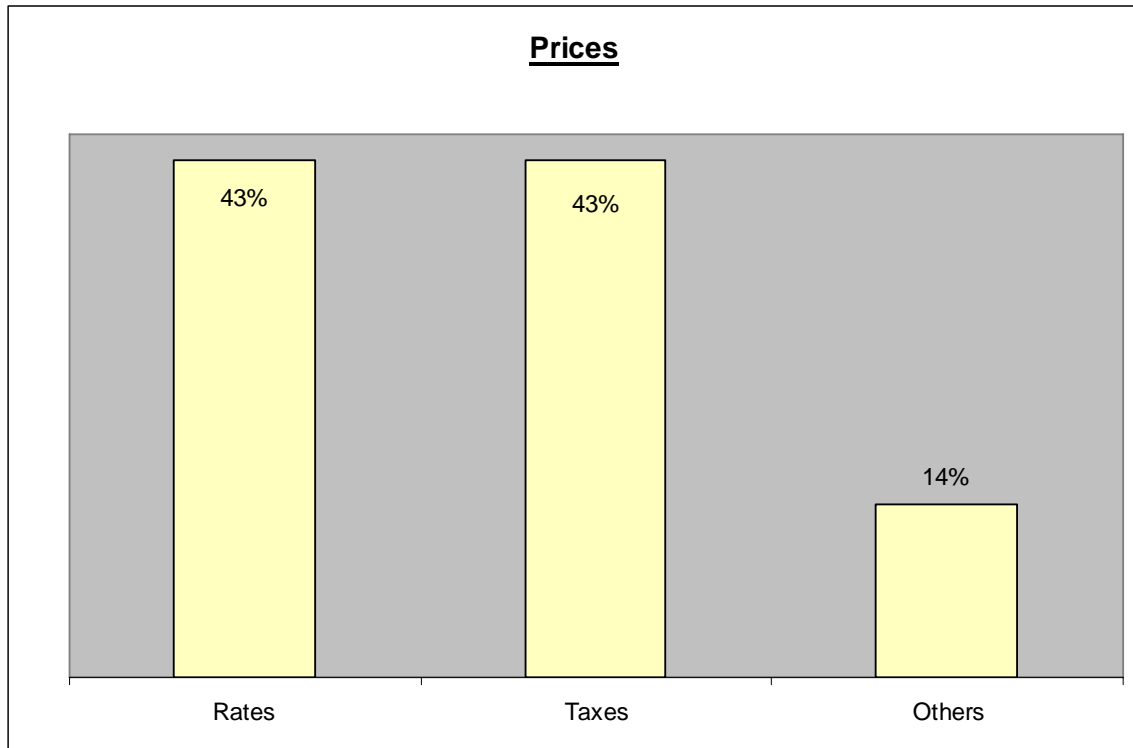
Market was recognised as an issue the NTS needs to address (23%) with 26 identified issues and 4 discreet categories as listed below.



Target Market approach (38%) is the most common topic with a particular interest in the Domestic Market (19%) and Asian Market (19%).

4.4 Price

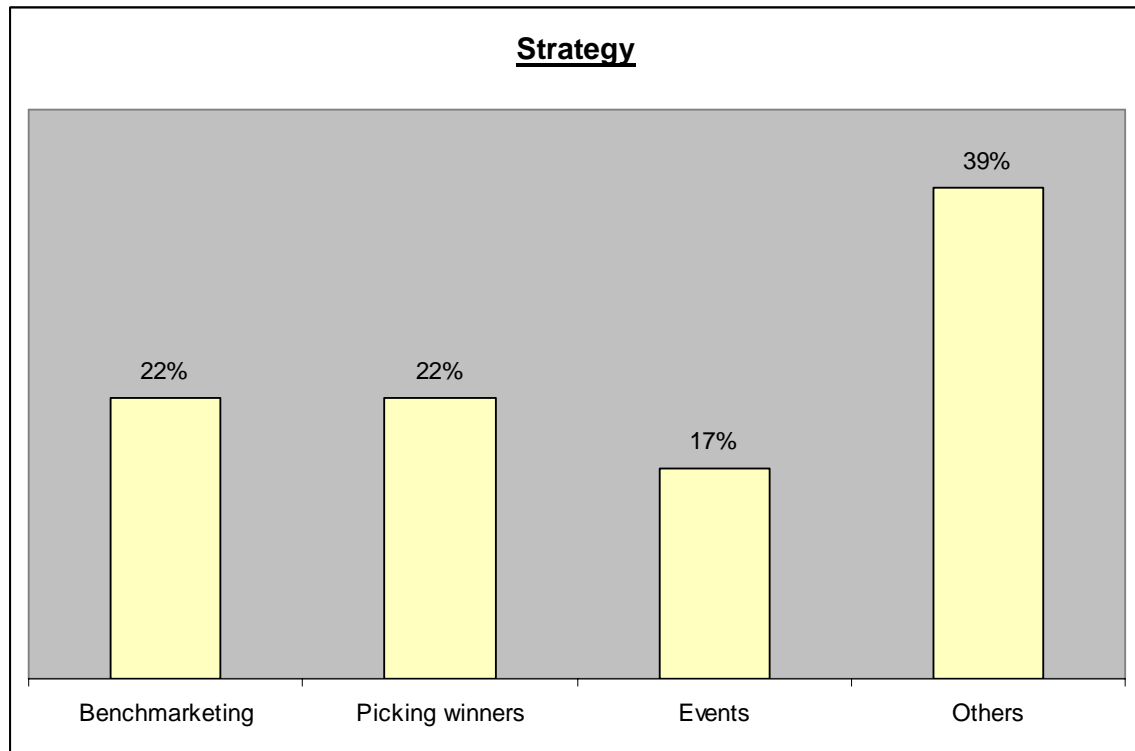
Prices policy was recognised as a minor issue that the NTS needs to address (6%) with 7 identified issues and 2 discreet categories as listed below.



Rates (43%) and Tax (43%) were the principal topics nominated in this category but subjects are varied and not significant. Rates refer to issues including carbon taxes and discounting policies. Taxes are related to the tax breaks, taxation barriers and tourism taxes.

4.5 Marketing Strategy

Marketing strategy was recognised as an issue that the NTS needs to address (16%) with 18 identified issues and 3 discreet categories as listed below.

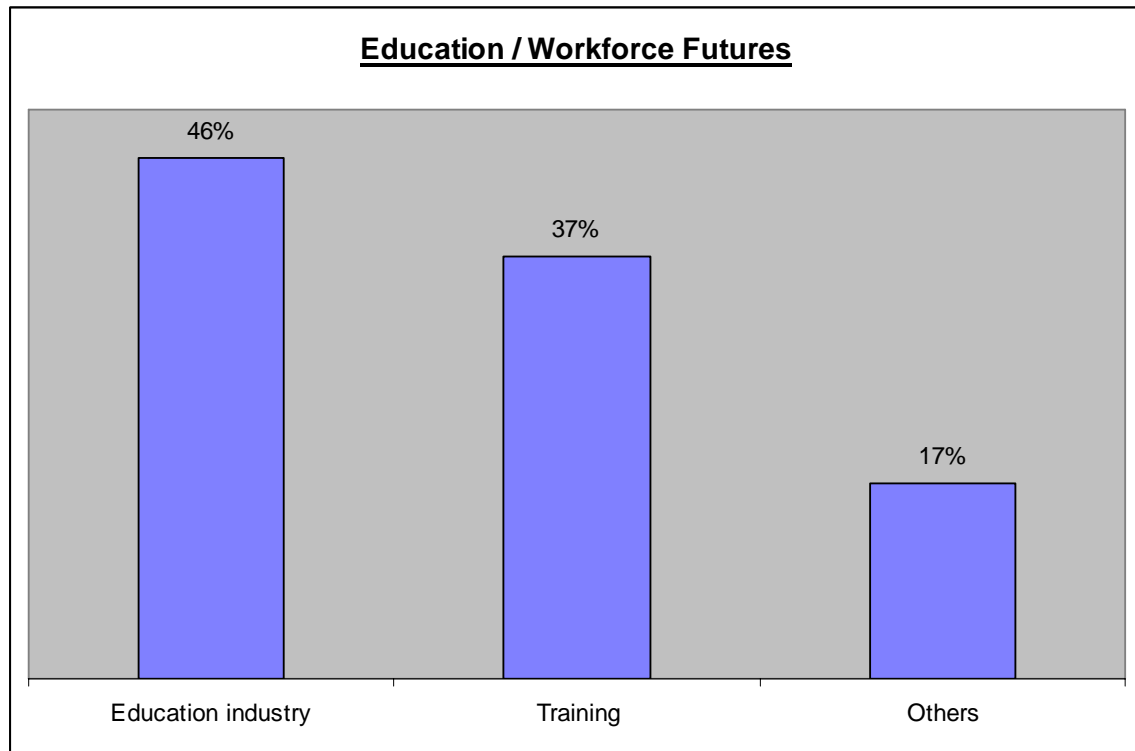


Benchmarking (22%), Picking Winners (22%) and Events Organisation (17%) are designated as important marketing strategies.

The others issues refer to distribution and data.

5.0 Education and Workforce Futures

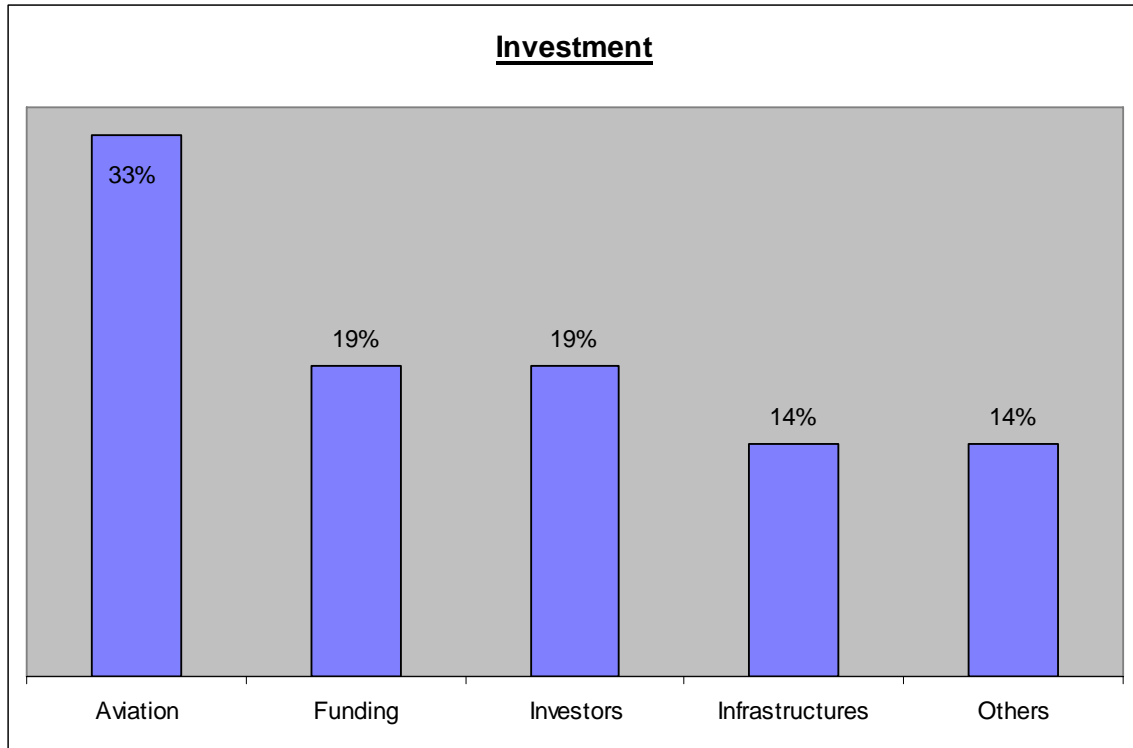
Education and Workforce futures were recognised as an issue (31%) to address with 35 identified issues and 2 discreet categories as listed below.



A large number of respondents (46%) showed Education Industry would be an important issue for the NTS. They pay particular attention to education quality, development, improvement, standards, new technology, marketing and research. Respondents mentioned that Training (37%) must be increased in order to solve the skills shortage, develop professionalism and decrease labour turnover.

6.0 Investment

Investment was recognised as an issue (18%) with 21 identified issues and 4 discreet categories as listed below.

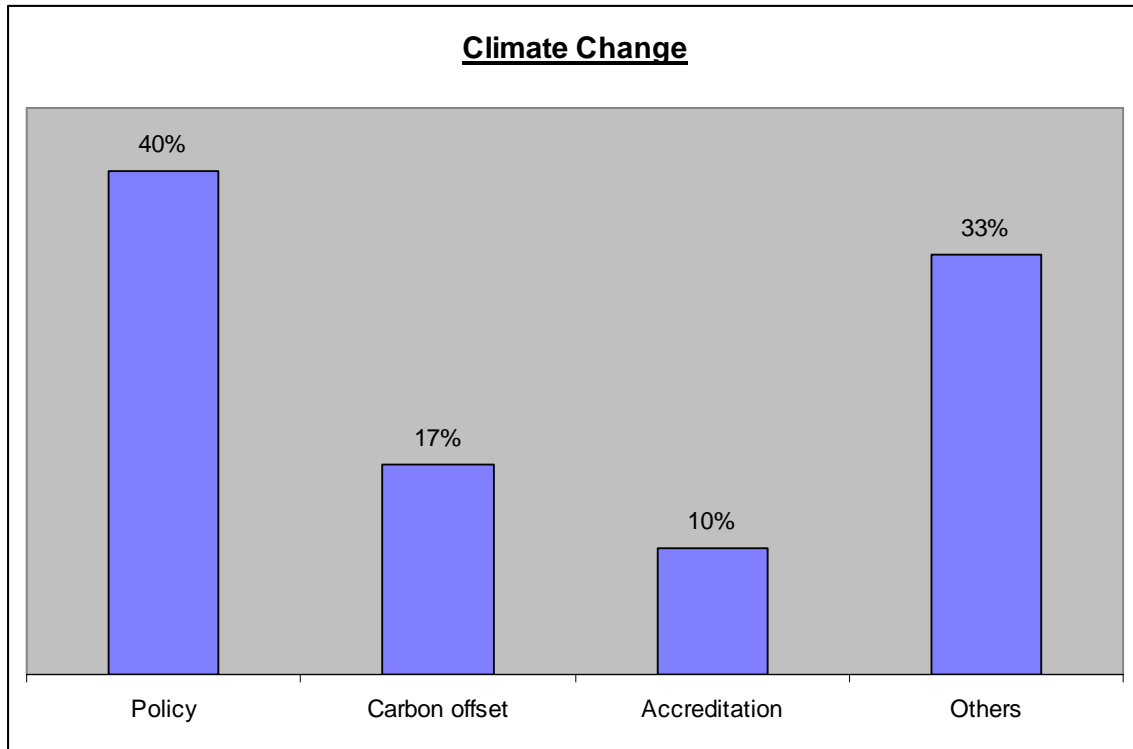


Investment refers to Aviation (33%), Funding (19%), attracting more Investors (19%) and Developing Infrastructures (14%).

The others issues in this category are investing in innovation and product development.

7.0 Climate Change

Climate Change was recognised as an issue (16%) with 18 identified issues and 3 discreet categories as listed below.

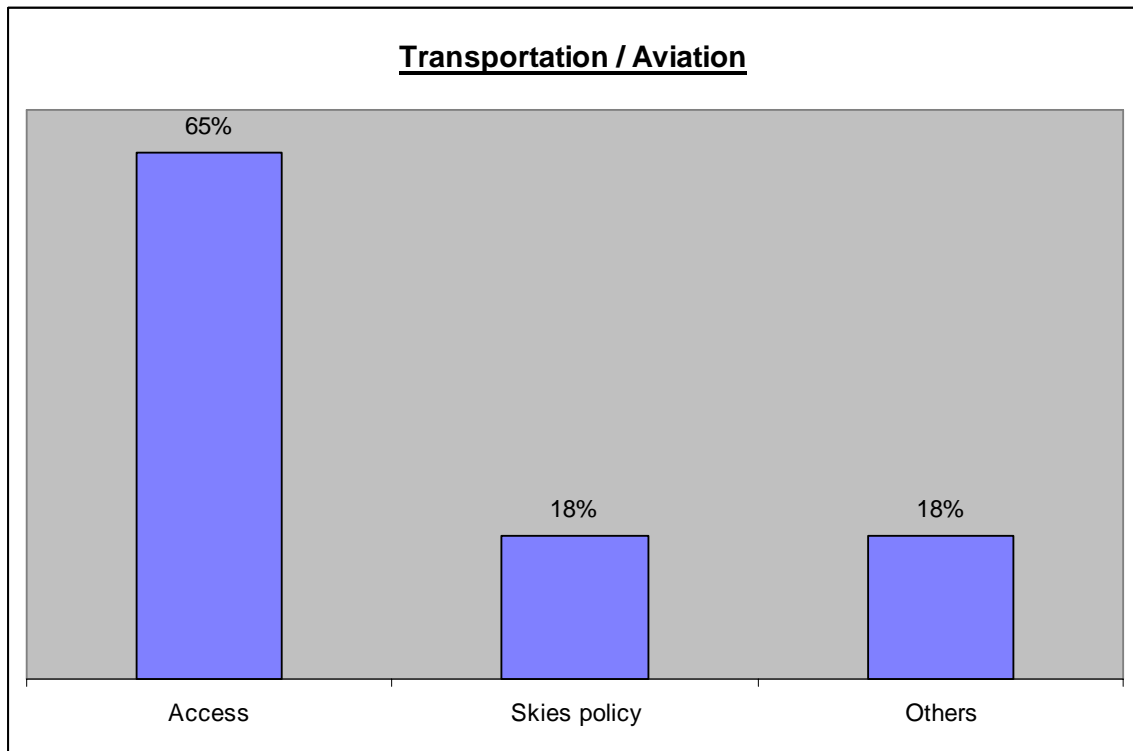


Implementation of Policy (40%), Carbon Offset (17%), Accreditation (10%) are the main topics approached by respondents about Climate Change.

Concerning other issues, Benchmarking, Education and Long-haul travel were also nominated.

8.0 Transportation / Aviation

Transportation and Aviation was recognised (15%) with 17 identified issues and 2 discreet categories as listed below.



A large majority of respondents shows that improving air Access (65%) and open skies policy (29%) are subjects that respondents would like to see addressed by the NTS.

9.0 Summary

The delegation of Tourism Futures is strongly 'whole of industry'. The delegation consists of both direct and indirect participants of the tourism industry – across industry, government at all levels, industry associations and research. This broad level of involvement ensures a holistic discussion and debate of topics.

The most nominated issue requiring attention by the National Tourism Strategy was policy. In particular the issue of partnerships, "whole-of-government" coverage and the structure of the NTS were nominated.

Marketing was the next most frequent issue raised. In particular the areas of promotion/communication; followed by product; and target markets were raised.

Workforce futures/education was also nominated as an important issue with a particular attention to education, new technology, marketing, research and training.

Investment (which is mostly related to aviation); Climate Change (associated with policy) and transportation/aviation (associated with air access improvement) were all nominated as second order issues.

Sustainability was also nominated by a small number of delegates but the sustainability issue was fragmented across other topics such as Climate Change.

Mireille ICARD

Intern Tourism Analyst

Master's degree in Sustainable Tourism, Ecotourism