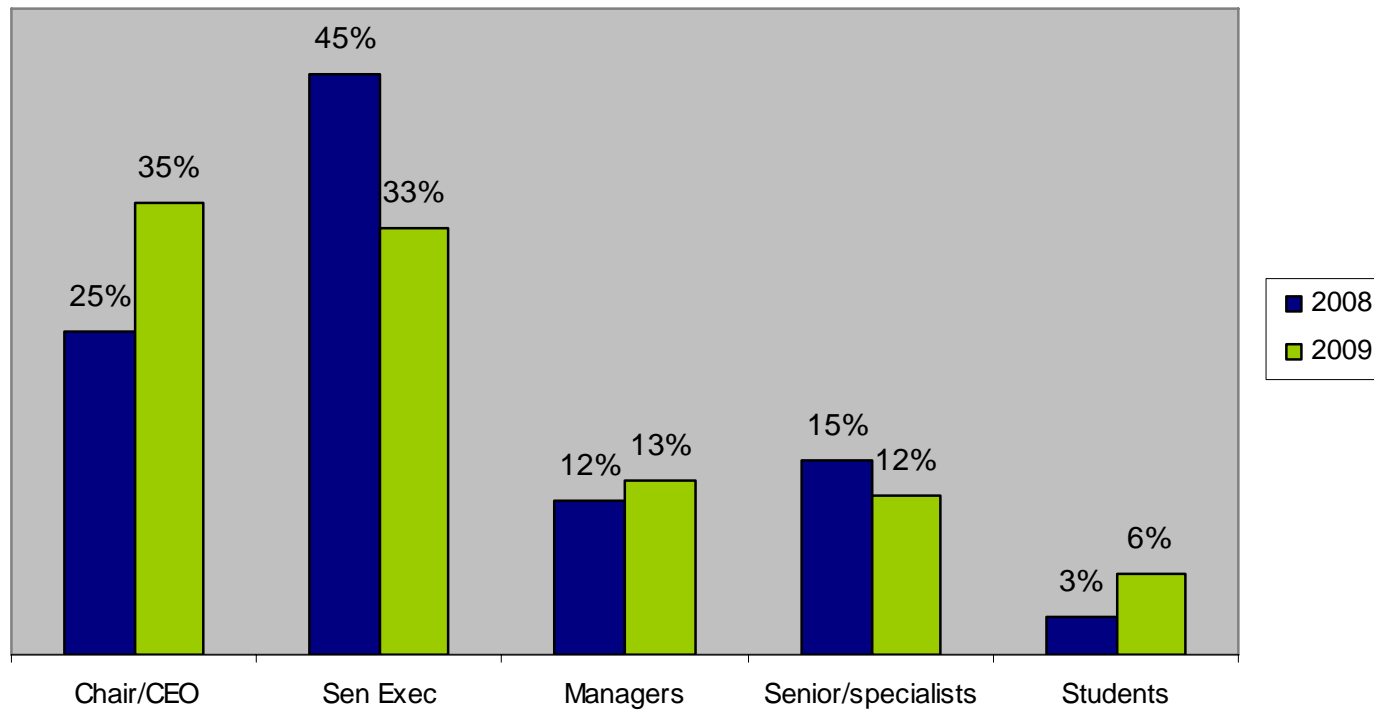


# ***Redefining the Future***

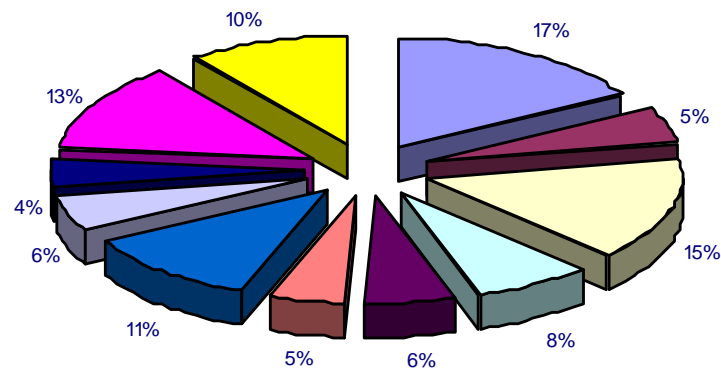
## **Tourism Futures is about:**

- Stepping back from our businesses and organisations; our regions, our states, our nation
- Taking time out from day to day issues, looking forward ten years – across the horizon
- Identifying emerging trends, challenges and opportunities
- Establish some agreed priorities

### Position Composition of Delegation

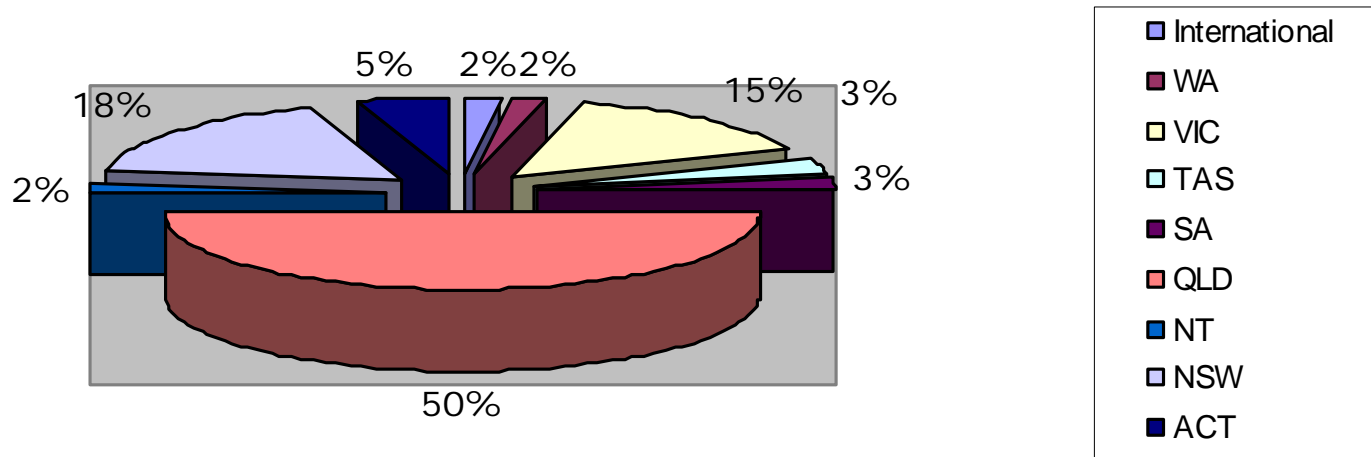


### Full Delegate Sector Composition

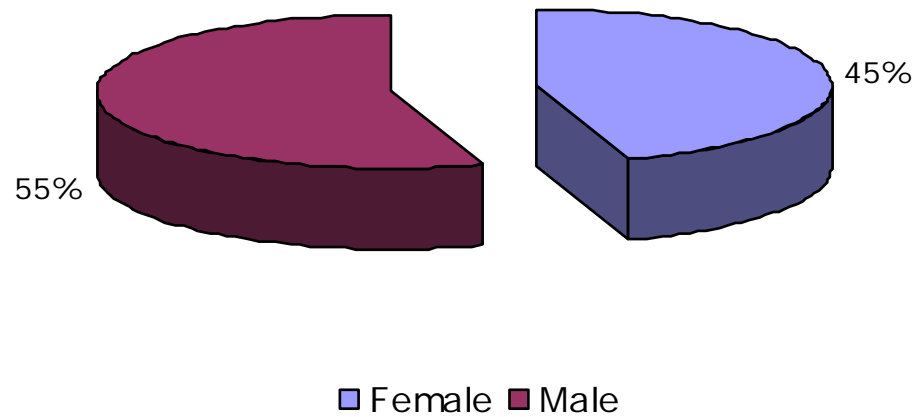


- Operators
- NTO
- STO
- RTO/LTO
- Local Gvt
- Consultants
- Education
- Research
- Environment
- Other
- Associations

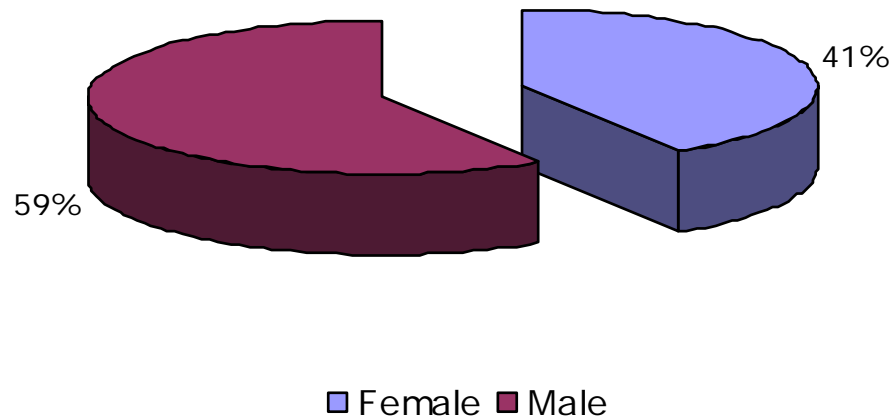
## State Breakdown of Full Registrations



### Delegate Gender



### Presenter Gender



**Roy Morgan Research**

**Tourism Futures Survey**



# Participating organisations

Type of Organisation	
Tourism Operator	38%
Local Government	10%
Consultant	10%
University/ TAFE/ other academic	9%
Industry Association	7%
Other State Government Department	6%
Regional or Local Tourism Organisation	6%
State or Commonwealth Tourism Office	3%
Other Commonwealth Government Department	2%
Other	8%

## Top Five Challenges Facing the Australian Tourism Industry – Next 10 Years

Challenges	%
Impact of climate change on destinations (e.g. reef, alpine, wetlands)	36%
Competition by overseas destinations	25%
Need for product development and infrastructure in regional areas	21%
International trade response to climate change (e.g. long haul fuel taxes, carbon emission trading scheme)	21%
Preparing for growth in emerging international markets (e.g. Asia-Pacific, China, India)	21%

## Top Five Competitive Advantages – Next 10 Years

Competitive Advantages	%
Stable and safe country	70%
Clean/green environment/natural/pristine beauty of Australia	58%
Australia's culture and friendly people	47%
Unique experience offered in Australia	44%
Vastness of Australia/uncrowded	42%

## Australia's Top Five Opportunities for Growth - Next 10 Years

Opportunities for Growth	%
Ecotourism	46%
Baby Boomers/50+ Tourism	42%
National Landscapes (iconic experiences)	32%
Grey Nomads/Senior Tourism	28%
Indigenous Tourism	27%

## Steps Taken towards Reducing Organisation's Carbon Footprint

Action	2008	2009	% Points Change
Commenced implementing measures to reduce carbon footprint	42%	46%	4%
Development of strategy to reduce carbon footprint	35%	44%	9%
Audit to determine size of carbon footprint	22%	32%	10%
Ongoing monitoring of carbon footprint size	20%	29%	9%
Have not undertaken any steps	20%	17%	-3%

## Employment Issues

Issue	%
My organisation has laid off staff in the last 6 months	13%
My organisation intends to lay off (or further lay off) staff in the next 12 months	7%
None of these	68%

# Conference Steering Committee: Tourism Queensland

Michelle Clarke

Jane Mallam

Therese Phillips

Craig Shim

# Tourism Australia

Michelle Gapes

# Gold Coast Tourism

Lindsay Wallace

Emma Berg

**Thank You**

