Discover your edge

TOURISM FUTURES SURVEY 2009

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1. EXECUTIVE SUMMARY

TOP FIVE CHALLENGES

The 2009 Tourism Futures Survey has revealed that the top five challenges facing the Australian tourism industry are:

Next Year

- World economy/global financial crisis
- Declining consumer spending
- Australian economy
- Marketing Australia domestically
- Competition by overseas destinations

Next Ten Years

- Impact of climate change on destinations (e.g. reef, alpine, wetlands)
- Competition by overseas destinations
- Need for product development and infrastructure in regional areas
- Sustainability of tourism (triple bottom line – social, environmental and economic sustainability)
- International trade response to climate change (e.g. long haul fuel taxes, carbon emission trading scheme)

TOP FIVE COMPETITIVE ADVANTAGES

The survey results indicated that the tourism industry's top five competitive advantages are:

Next Year

- Stable and safe country
- Australia's culture and friendly people
- Clean/green environment/ natural/ pristine beauty of Australia
- Unique experience offered in Australia
- Diversity of product/experience

Next Ten Years

- Stable and safe country
- Clean/ green environment/ natural/ pristine beauty of Australia
- Australia's culture and friendly people
- Unique experience offered in Australia
- Vastness of Australia/uncrowded

TOP FIVE GROWTH MARKETS

The survey results revealed that the top five growth markets for the Australian tourism industry are:

Next Year

- Domestic Tourism
- Baby Boomers/50+ Tourism
- Ecotourism
- Backpackers
- Grey Nomads/ Senior Tourism

Next Ten Years

- Ecotourism
- Baby Boomers/50+ Tourism
- National Landscapes (iconic experiences)
- Grey Nomads/ Senior Tourism
- Indigenous Tourism

TOP FIVE MARKETING INITIATIVES

The survey results indicated that the top five marketing initiatives Australia should be undertaking to compete with overseas destinations are:

Marketing Initiatives

- Promoting Australia’s natural environment
- Promoting Australia’s uniqueness
- Promoting iconic Australian experiences/brands
- Increasing co-ordination between government and private enterprise
- Promoting Australia’s culture

2. INTRODUCTION

2.1 Background

The Tourism Futures Conference is held annually to provide a forum to discuss the key issues shaping the Australian tourism industry. In the lead up to this conference, a questionnaire is distributed to provide a research based view on the issues facing this industry. More specifically, the survey investigates tourism delegates' perceptions of the Australian tourism industry and the issues they believe the industry is facing in the next year and over the next ten years.

2.2 Research Objectives

The aim of this research is to gain an insight into the perceptions of the tourism industry and the key issues facing the Australian tourism industry in the immediate future and over the next ten years.

As per the previous year(s), the core issues being explored in the present research are:

- Challenges facing the industry;
- Competitive advantages;
- Opportunities for growth;
- Marketing initiatives that Australia should be undertaking to develop a competitive edge; and
- Steps taken to reduce organisations' carbon footprints;

To address current topics of interest to the Australian tourism industry, this year's survey also investigates:

- Staff retention issues and solutions; and
- The need for a new face of Australian Tourism.

3. METHODOLOGY

The Tourism Futures Survey is conducted in the lead up to the National Tourism Futures Conference.

The survey was distributed to a national database of tourism industry contacts and delegates of the Tourism Futures National Conference. Links to the online survey were first emailed to the database on 29 May 2009, with subsequent reminders included in the Tourforce e-newsletter in the lead up to the conference. In total, 243 completed questionnaires were received from respondents.

To maximise participation in the survey all respondents had the option of entering a draw to win a two night holiday at Kingfisher Bay Resort on Fraser Island.

4. TYPES/LOCATIONS OF ORGANISATIONS PARTICIPATED

The following table summarises the composition of the sample in terms of organisation type:

Table 1: 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%

The following table highlights the composition of the sample in terms of place of residence:

Table 2: State or Territory

State or Territory	
Queensland	37%
Victoria	21%
New South Wales	17%
Western Australia	7%
South Australia	6%
Tasmania	4%
Northern Territory	3%
Australian Capital Territory	1%
New Zealand	2%
Other Overseas Country	2%

5. CHALLENGES

5.1 Short Term Challenges

Table 3: Unprompted Responses

Main Issues and Challenges Facing Australia in the Next Year	2008	2009	% Points Change
Recession/ Economic Downturn	3%	45%	42%
Swine Flu	-	13%	-
Reduced Disposable Income/Cost Of Living	10%	12%	2%
Need to increase visitor numbers	6%	11%	5%
Competition by overseas destinations	9%	7%	-2%
Sustainability of tourism (social, environmental, economic)	5%	7%	2%
Marketing Australia domestically	4%	6%	2%
Declining Consumer Confidence/ Fear Due Economic Downturn	-	5%	-
People Taking Less Holidays (Due To Workplace Culture/ IR Laws/ Family)	3%	5%	2%
Climate Change/ Drought/Global Warming	7%	4%	-3%
Increasing oil/fuel costs	18%	4%	-14%
Industry profitability	1%	4%	3%
Level of finance/investment	2%	4%	2%
(Flu) Pandemics/ Epidemics	-	3%	-
Air access to Australia	2%	3%	1%
Marketing Australia internationally	5%	3%	-2%
Quality Of Product/ Differentiation Of Product/ New Product	1%	3%	2%
Affordability/ High Cost Of Travel	7%	2%	-5%
Australian economy/dollar	25%	2%	-23%
Better/ Cohesive/ Exciting Branding/ A New Australian Brand	1%	2%	1%
Businesses/ Corporations Reducing Travel Spend	-	2%	-
Demand/ Meeting Demand	-	2%	-
Improving Customer Service/ Quality Of Standards	4%	2%	-2%
Increasing cost of holidays	1%	2%	1%
Industry Unification/ Collaboration/ Cohesion/Communication	1%	2%	1%
Lack Of Domestic Regional Flights	1%	2%	1%
World economy	5%	2%	-3%
(Unpredictable/ Changing) Weather Patterns	1%	1%	0%
Access to protected areas for nature based tourism	-	1%	-
Australian Reputation Tarnished/ Bad (Racism Etc)	1%	1%	0%
Bushfires	-	1%	-
Capacity/Air Travel Capacity	1%	1%	0%

Main Issues and Challenges Facing Australia in the Next Year (contd)	2008	2009	% Points Change
Cheap Outbound Destinations	4%	1%	-3%
Competition For Discretionary Spend From Other Industries	3%	1%	-2%
Competition/ Being Competitive	2%	1%	-1%
Domestic political policies/ election	4%	1%	-3%
Encourage Longer Stays	-	1%	-
Increasing compliance costs to meet regulatory standards	-	1%	-
Interest Rates/ Mortgage Costs	16%	1%	-15%
Level of support from Government	3%	1%	-2%
Marketing Issues (general)	3%	1%	-2%
Media Hype Relating To Economy/ GFC	-	1%	-
Media Hype Relating To Swine Flu/ Epidemics/ Pandemics	-	1%	-
Need for Product Development and Infrastructure in Regional Areas	-	1%	-
Racism/ Perceived Racism Due To Indian Student Attacks	-	1%	-
Smaller Operators Unable To Match Discounts/ Value Offered By Larger Operators	-	1%	-
Travel Distances	1%	1%	0%
Unemployment	-	1%	-
Unrealistic Expectations Of Value/ Discounts	-	1%	-
Wages/ Cost Of Employing People	-	1%	-

Table 4: Prompted Responses

Main Issues and Challenges Facing Australia in the Next Year	2008	2009	% Points Change
World economy/Global Financial Crisis*	20%	62%	42%
Declining consumer spending	-	32%	-
Australian economy	12%	24%	12%
Marketing Australia domestically	10%	21%	11%
Competition by overseas destinations	16%	19%	3%
Airlines reducing capacity/cancelling routes	-	19%	-
Less Australians taking a holiday	13%	18%	5%
Declining tourist numbers	10%	17%	7%
Loss of skilled workers due to forced retrenchment as a result of the global financial crisis	-	14%	-
Effect of world instability on Australia (e. g. terrorism and pandemics)	2%	14%	12%
Unemployment	-	14%	-
Need for product development and infrastructure in regional areas	19%	12%	-7%
Level of support and funding from Government	16%	12%	-4%
The price of oil/ fuel and the effect on drive tourism	23%	11%	-12%
Australia's Exchange Rate	32%	9%	-23%
Negative reports about tourism in media	4%	9%	5%
Lack of innovation or new product experiences in Australia	-	9%	-
The price of oil/ fuel and the effect on airfares	29%	9%	-20%
Responding to the decline in traditional international markets (e.g. Japan)	9%	8%	-1%
Delivery of quality product and services	10%	8%	-2%
Impact of climate change on destinations (e.g. reef, alpine, wetlands)**	15%	7%	-8%
Identification and differentiation of Brand Australia	4%	7%	3%
Need for faster broadband technology in Australia	-	7%	-
Partnerships between government, industry and private sector	6%	7%	1%
Dispersion of visitation to regional areas	8%	7%	-1%
Industry profitability/ level of investment in tourism	7%	7%	0%
Sustainability of tourism (triple bottom line -social, environmental and economic sustainability)	9%	6%	-3%
Sustainability of reduced airfares and travel deals as a result of the global financial crisis	-	6%	-
Labour and skills shortage***	24%	6%	-18%
Absence of Low Cost Carriers in key destinations	7%	6%	-1%
Marketing Australia internationally	7%	5%	-2%
Preparing for growth in emerging international markets (e.g. Asia Pacific, China, India)	3%	5%	2%
Lack of tourism infrastructure (e.g. hotel developments and cruise ship terminals)****	11%	5%	-6%
Air access within Australia	7%	5%	-2%
Developing and keeping up with technology for distribution	4%	5%	1%
Lack of a national quality standard for the Australian tourism industry	-	5%	-
International trade response to climate change (e.g. long haul fuel taxes, carbon emission trading scheme)	-	4%	-
Access to protected areas for nature-based tourism	3%	4%	1%
Lack of host community support for tourism	6%	3%	-3%
Timely, accurate and relevant research	5%	3%	-2%

Main Issues and Challenges Facing Australia in the Next Year (contd)	2008	2009	% Points Change
Mortgage costs	54%	3%	-51%
Air access to Australia	9%	3%	-6%
Sustainability of tourism based on natural attractions	5%	2%	-3%
Aging Population	1%	2%	1%
Establishing a common border to simplify travel across the Tasman (e.g. cut passenger movement charges between Australia and New Zealand)	-	2%	-
International air services focusing on outbound travellers	6%	2%	-4%

*Category was World economy in 2008
**Category was Climate change/global warming in 2008
***Category was Training and staffing issues (including skill shortage) in 2008
****Category was General lack of tourism infrastructure in 2008

5.2 Long Term Challenges

Table 5: Unprompted Responses

Main Issues and Challenges Facing Australia in the Next 10 Years	2008	2009	% Points Change
Climate Change/ Global Warming	17%	13%	-4%
Competition by overseas destinations	10%	9%	-1%
Sustainability of tourism (social, environmental, economic)	9%	9%	0%
Increasing oil/fuel costs	15%	8%	-7%
Change With Market Demand	1%	7%	6%
Increased Public Conscience About Climate Change/Pollution/Environmental Issues	2%	7%	5%
New product/refreshing existing product	6%	7%	1%
Infrastructure Issues (general)	6%	5%	-1%
Pollution/ Carbon Emissions/ Environmental Damage/Destruction Of Natural Attraction	11%	5%	-6%
Quality/ Standards/Customer Service	6%	5%	-1%
Skilled Labour Shortage/ Need To Train More Staff/ Staff Retention	1%	5%	4%
Transport Costs/ Travel Costs	4%	5%	1%
Differentiation/ Brand Australia/ Character/Identification	1%	4%	3%
Level of finance/investment	1%	4%	3%
Marketing Issues (general)	6%	4%	-2%
Need for Product Development and Infrastructure in Regional Areas	2%	4%	2%
World economy	3%	4%	1%
Australian economy/dollar	5%	3%	-2%
Developing and keeping up with technology for distribution	2%	3%	1%
Dispersion of visitation to regional areas	-	3%	-
Economic Downturn/ GFC	-	3%	-
Health	-	3%	-
Level of support from Government	2%	3%	1%
Marketing Australia domestically	4%	3%	-1%
Marketing Australia internationally	3%	3%	0%
Need to increase visitor numbers	2%	3%	1%
No Justification Of Long Haul Flights (Due To Environmental Concerns)	-	3%	-
Safety/security	2%	3%	1%
Should Be A Nationally Recognised Industry/ Professional Industry/Needs To Streamline/ It's Sending Mixed Messages	1%	3%	2%
Terrorism	1%	3%	2%
Aging population/Baby Boomers	4%	2%	-2%
Air access to Australia	6%	2%	-4%
Carbon Emission Trading Schemes	2%	2%	0%
Competition/ Market Share	6%	2%	-4%

Main Issues and Challenges Facing Australia in the Next 10 Years (contd)	2008	2009	% Points Change
Distance	3%	2%	-1%
Diverse Product/ Options/ Experiences	2%	2%	0%
Increase Accommodation Properties	-	2%	-
Increased Customer Expectations	3%	2%	-1%
Managing/ Maintaining Growth/ Growing Market	1%	2%	1%
Need To Promote Ecotourism/ Need To Be Greener/ Look More Environmentally Friendly/ Nature Based	-	2%	-
Partnership Issues (general)	-	2%	-
Staying Competitive/ Price Competition/ Value/ Labour Costs Are Too High	3%	2%	-1%
Weather/ Unpredictable Weather/ Rain	1%	2%	1%
Access to protected areas for nature based tourism	-	1%	-
Air access within Australia	-	1%	-
Cost (General)	3%	1%	-2%
Declining Domestic Tourism Market	1%	1%	0%
Domestic political policies/ election	1%	1%	0%
Hospitality training and staffing issues	-	1%	-
Increasing compliance costs to meet regulatory standards	-	1%	-
Industry professionalism	1%	1%	0%
Industry profitability	-	1%	-
Low Cost Carriers (Lcc) Attracting/ Managing The Indian Market	-	1%	-
Multicultural Society	1%	1%	0%
New/emerging source markets	1%	1%	0%
Over Development	1%	1%	0%
Pandemics	-	1%	-
Partnerships between government	-	1%	-
People Taking Less Holidays (Due To Workplace Culture/ IR Laws/Family)	1%	1%	0%
Regulations	-	1%	-
Taxes/ Government Charges	1%	1%	0%
The Internet/ Online Bookings	2%	1%	-1%
Water Shortages/Drought	1%	1%	0%
Youth Travel Culture In Decline	1%	1%	0%

Table 6: Prompted Responses

Main Issues and Challenges Facing Australia in the Next 10 Years	2008	2009	% Points Change
Impact of climate change on destinations (e.g. reef, alpine, wetlands)*	42%	38%	-4%
Competition by overseas destinations	16%	26%	10%
Need for product development and infrastructure in regional areas	25%	21%	-4%
Sustainability of tourism (triple bottom line -social, environmental and economic sustainability)	17%	21%	4%
International trade response to climate change (e.g. long haul fuel taxes, carbon emission trading scheme)	-	20%	-
Lack of innovation or new product experiences in Australia	-	20%	-
Effect of world instability on Australia (e. g. terrorism and pandemics)	6%	19%	13%
Preparing for growth in emerging international markets (e.g. Asia Pacific, China, India)	5%	19%	14%
Aging Population	18%	17%	-1%
The price of oil/ fuel and the effect on airfares	39%	15%	-24%
Identification and differentiation of Brand Australia	7%	14%	7%
Labour and skills shortage**	21%	14%	-7%
Marketing Australia internationally	10%	13%	3%
Lack of tourism infrastructure (e.g. hotel developments and cruise ship terminals)***	16%	12%	-4%
Sustainability of tourism based on natural attractions	14%	12%	-2%
World economy/Global Financial Crisis****	16%	12%	-4%
Partnerships between government, industry and private sector	11%	12%	1%
Level of support and funding from Government	12%	11%	-1%
Marketing Australia domestically	4%	10%	6%
Industry profitability/ level of investment in tourism	12%	10%	-2%
The price of oil/ fuel and the effect on drive tourism	15%	10%	-5%
Lack of a national quality standard for the Australian tourism industry	-	10%	-
Developing and keeping up with technology for distribution	4%	8%	4%
Australia's Exchange Rate	6%	8%	2%
Delivery of quality product and services	9%	8%	-1%
Need for faster broadband technology in Australia	-	7%	-
Air access to Australia	9%	7%	-2%
Australian economy	5%	7%	2%
Access to protected areas for nature-based tourism	4%	7%	3%
Responding to the decline in traditional international markets (e.g. Japan)	5%	6%	1%
Airlines reducing capacity/cancelling routes	-	6%	-
Timely, accurate and relevant research	6%	6%	0%
Declining consumer spending	-	6%	-
Dispersion of visitation to regional areas	7%	6%	-1%
Declining tourist numbers	6%	5%	-1%
Air access within Australia	5%	4%	-1%
Unemployment	-	4%	-
Less Australians taking a holiday	10%	3%	-7%
Mortgage costs	20%	3%	-17%
Absence of Low Cost Carriers in key destinations	6%	3%	-3%
Lack of host community support for tourism	7%	3%	-4%

Main Issues and Challenges Facing Australia in the Next 10 Years (contd)	2008	2009	% Points Change
Sustainability of reduced airfares and travel deals as a result of the global financial crisis	-	3%	-
Loss of skilled workers due to forced retrenchment as a result of the global financial crisis	-	2%	-
Negative reports about tourism in media	3%	2%	-1%
International air services focusing on outbound travellers	4%	1%	-3%
Establishing a common border to simplify travel across the Tasman (e.g. cut passenger movement charges between Australia and New Zealand)	-	1%	-

*Category was Climate change/global warming in 2008
** Category was Training and staffing issues (including skill shortage) in 2008
***Category was General lack of tourism infrastructure in 2008
****Category was World economy in 2008

COMPETITIVE ADVANTAGES

5.3 Short Term Competitive Advantages

Table 7: Unprompted Responses

Australia's Main Competitive Advantages - Next Year	2008	2009	% Points Change
Stable and safe country	24%	29%	5%
Green environment/natural/pristine beauty of Australia	23%	22%	-1%
Diversity of product/experience	10%	17%	7%
The Australian Currency/ Exchange Rate	-	10%	-
Unique experience offered in Australia	10%	10%	0%
Australia's culture and friendly people	11%	9%	-2%
Clean environment/minimal pollution in Australia	-	7%	-
Our Climate	5%	5%	0%
Vastness of Australia/uncrowded	6%	5%	-1%
Australia's economic health	2%	4%	2%
Icons/ Iconic Destinations/ Attractions	-	4%	-
Unique/ Different Landscape	-	4%	-
Opportunities For Domestic Tourism Due To Economic Decline	-	3%	-
Affordable	1%	2%	1%
Australia's environmental management practices	3%	2%	-1%
Australia's status as a highly desirable destination	5%	2%	-3%
Diversity Of Wildlife	3%	2%	-1%
Ecotourism	1%	2%	1%
Geographic location/distance from other countries	3%	2%	-1%
Increased Exposure Internationally	-	2%	-
Indigenous culture	4%	2%	-2%
Low Cost/ Competitive Domestic Airfares	-	2%	-
Unique/ Different Flora	-	2%	-
An Increase In Domestic Tourism	-	1%	-
Easy Access To Most Destinations	-	1%	-
Food/ Hospitality	-	1%	-
Good Value For Money	2%	1%	-1%
Government Support	1%	1%	0%
Natural Resources	1%	1%	0%
Opportunities For Growth In Regional Areas	-	1%	-
Quality/ High Standards Of Service	-	1%	-
The Australian Brand/ Brand Appeal	3%	1%	-2%
The Australian Outback/ Desert	1%	1%	0%
Undeveloped Areas Available For Tourists	2%	1%	-1%
Unique/ Different Fauna	-	1%	-
Well developed tourism infrastructure	-	1%	-

Table 8: Prompted Responses

Australia's Main Competitive Advantages - Next Year	2008	2009	% Points Change
Stable and safe country	67%	72%	5%
Australia's culture and friendly people	52%	49%	-3%
Clean/Green environment/natural/ pristine beauty of Australia	52%	47%	-5%
Unique experience offered in Australia	47%	47%	0%
Diversity of product/experience	37%	43%	6%
Our Climate	40%	40%	0%
Australia's status as a highly desirable destination	41%	39%	-2%
Vastness of Australia/uncrowded	37%	35%	-2%
Australia's economic health	20%	27%	7%
Indigenous culture	20%	21%	1%
Well developed tourism infrastructure	16%	19%	3%
Australia's response to climate change	-	5%	-

5.4 Long Term Competitive Advantages

Table 9: Unprompted Responses

Australia's Main Competitive Advantages - Next 10 Years	2008	2009	% Points Change
Stable and safe country	22%	25%	3%
Green environment/natural/pristine beauty of Australia	-	21%	-
Diversity of product/experience	6%	11%	5%
Vastness of Australia/uncrowded	6%	9%	3%
Australia's culture and friendly people	10%	7%	-3%
Unique experience offered in Australia	8%	7%	-1%
Clean environment/minimal pollution in Australia	22%	6%	-16%
Sustainability Of The Industry/ Sustainable Tourism Products	2%	5%	3%
Australia's environmental management practices	5%	4%	-1%
Ecotourism	3%	4%	1%
Geographic location/distance from other countries	3%	4%	1%
Politically Stable	2%	4%	2%
Indigenous culture	4%	3%	-1%
Australia's status as a highly desirable destination	2%	2%	0%
Climate	4%	2%	-2%
Diversity Of Wildlife	3%	2%	-1%
Good/ High Quality	-	2%	-
Value For Money/ Value	1%	2%	1%
Affordable	2%	1%	-1%
Australia's economic health	1%	1%	0%
Australia's History/ World Heritage Places	1%	1%	0%
Develop/ Opening New Areas	-	1%	-
Easy To Access	2%	1%	-1%
Exchange Rate	1%	1%	0%
Innovations/improvements to the tourism industry	2%	1%	-1%
The Australian Brand	1%	1%	0%
Unique/ Different Fauna	-	1%	-
We Are A Multicultural Society	1%	1%	0%
Well developed tourism infrastructure	1%	1%	0%

Table 10: Prompted Responses

Australia's Main Competitive Advantages - Next 10 Years	2008	2009	% Points Change
Stable and safe country	61%	70%	9%
Clean/Green environment/natural/ pristine beauty of Australia	61%	58%	-3%
Australia's culture and friendly people	43%	47%	4%
Unique experience offered in Australia	50%	44%	-6%
Vastness of Australia/uncrowded	43%	42%	-1%
Diversity of product/experience	43%	39%	-4%
Australia's status as a highly desirable destination	32%	37%	5%
Indigenous culture	34%	32%	-2%
Our Climate	31%	31%	0%
Well developed tourism infrastructure	23%	21%	-2%
Australia's response to climate change	-	18%	-
Australia's economic health	16%	17%	1%

6. OPPORTUNITIES FOR GROWTH

6.1 Short Term Opportunities for Growth

Table 11: Short Term Opportunities for Growth

Main Opportunities for Growth in the Next Year	2008	2009	% Points Change
Domestic Tourism	33%	44%	11%
Baby Boomers/50+ Tourism	-	42%	-
Ecotourism	36%	34%	-2%
Backpackers	30%	33%	3%
Grey Nomads/Senior Tourism	39%	26%	-13%
Drive Tourism	25%	25%	0%
Campervan/Caravan and Motorhome Tourism	22%	24%	2%
Special Events and Festivals	31%	23%	-8%
Food and Wine Tourism	31%	22%	-9%
National Landscapes (iconic experiences)	-	22%	-
Outback Tourism	24%	21%	-2%
Adventure Tourism	26%	20%	-6%
Short-haul Inbound Tourism	18%	19%	1%
Indigenous Tourism	13%	16%	3%
Reef-based Tourism	20%	16%	-4%
Education Tourism	18%	15%	-3%
Business Events Tourism (MICE)	23%	14%	-9%
Cruise Tourism	-	8%	-
Health and Spa Tourism	13%	6%	-7%
Volunteer Tourism	-	5%	-
Heritage Tourism	6%	5%	-1%
Gay and Lesbian Tourism	4%	4%	0%
Long-haul Inbound Tourism	10%	2%	-8%
Golf Tourism	3%	2%	-1%
Geotourism	3%	2%	-1%

6.2 Long Term Opportunities for Growth

Table 12: Long Term Opportunities for Growth

Main Opportunities for Growth in the Next 10 Years	2008	2009	% Points Change
Ecotourism	50%	46%	-4%
Baby Boomers/50+ Tourism	-	42%	-
National Landscapes (iconic experiences)	-	32%	-
Grey Nomads/Senior Tourism	52%	28%	-24%
Indigenous Tourism	26%	27%	1%
Outback Tourism	28%	25%	-3%
Adventure Tourism	29%	23%	-6%
Food and Wine Tourism	26%	23%	-3%
Backpackers	23%	22%	-1%
Domestic Tourism	29%	21%	-8%
Education Tourism	21%	20%	-1%
Special Events and Festivals	28%	17%	-11%
Business Events Tourism (MICE)	27%	16%	-11%
Campervan/Caravan and Motorhome Tourism	22%	16%	-6%
Drive Tourism	13%	14%	1%
Reef-based Tourism	11%	13%	2%
Short-haul Inbound Tourism	13%	11%	-2%
Cruise Tourism	-	11%	-
Volunteer Tourism	-	11%	-
Health and Spa Tourism	14%	9%	-5%
Long-haul Inbound Tourism	15%	9%	-6%
Gay and Lesbian Tourism	5%	8%	3%
Heritage Tourism	8%	7%	-1%
Geotourism	8%	6%	-2%
Golf Tourism	2%	5%	3%

7. REDUCTION OF CARBON FOOTPRINT

Table 13: Steps Undertaken towards Implementing a Program to Reduce 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%
Planting Gardens/ Trees	1%	3%	2%
Water Conservation/ Water Tanks	1%	2%	1%
Offices Are Energy Efficient/ Close To Carbon Neutral	1%	2%	1%
Installing Renewable Power Systems	1%	1%	0%
Recycling/ Paper/ Reusing Paper	3%	1%	-2%
Other	4%	11%	7%

8. STAFF RETENTION ISSUES

Table 14: Employment Issues faced by Organisation in the Last Year

Issues	
My organisation has laid off staff in the last 6 months	14%
My organisation intends to lay off (or further lay off) staff in the next 12 months	7%
Can't say	13%
None of these	69%

Table 15: Ways in which the Government/Industry Can Assist in Retaining Staff

Unprompted responses	
Provide Education/ Training Opportunities	16%
Taxation Breaks/ Initiatives For Small Businesses	8%
Promote Tourism/ Hospitality As A Long Term Career Option	8%
Subsidies/ Financial Incentives For Trainees	7%
Taxation Breaks/ Initiatives/ Relief	6%
Promotion Of Tourism Domestically	5%
Support/ Promote Investment In Tourism	5%
Abolish Overtime/ Penalty Rates	5%
Improve/ Better/ Wages/ Awards/ Conditions	5%
More Funding/ Financial Incentives/ Tax Breaks For Regional/ Outback Tourism	4%
Provide Support And Opportunities To Upskill/ Retrain Existing Workforce	4%
The Government Needs To Recognise The Value/ Importance Of Tourism	4%
Provide Apprenticeships/ Cadetships	3%
Promotion Of Tourism Overseas	3%
Subsidise Training	3%
Remove Payroll Taxes	2%
Assist With Marketing For Tourism	2%
Assist With Staff Retention	2%
Assistance/ Funding For Infrastructure Development	2%
More Flexibility With Wages/ Working Hours	2%
Encourage People To Take Holidays/ Maintain Work/ Life Balance	2%
Increase/ Assist With Events	1%
Ensure Sustainability Of Tourism	1%
Provide Incentives For Staff To Stay On During The Off Season (Training/ Financial Incentives)	1%
Positive Media Coverage/ Portrayal Of Tourism Industry	1%
Remove Red Tape/ Compliance Requirements	1%
Cut Down On Extra Costs/ Charges Related To Tourism	1%
Create A Pool Of Staff That Seasonal Operators Can Access/ A Program To Transfer Jobs Between Sites	1%
Reward/ Pay Staff On Qualifications/ Achievements/ Have A Structured Reward Program	1%
Good/ Appropriate Award System	1%
Better Career Structure/ Recognition Of Career Paths/ Qualifications	1%
Allow Pay Tax Free Threshold To Be Claimed For Equivalent Of Full Time Hours Across Multiple Short Hour Jobs	1%

9. MARKETING INITIATIVES

Table 16: Marketing Initiatives Australia should be Undertaking to Compete with Overseas Destinations

Marketing Initiative	2008	2009	% Points Change
Promoting Australia's natural environment	74%	71%	-3%
Promoting Australia's uniqueness	76%	67%	-9%
Promoting iconic Australian experiences/ brands	34%	60%	26%
Increasing co-ordination between government and private enterprise	46%	47%	0%
Promoting Australia's culture	44%	42%	-2%
Forming closer links and marketing co-operatively with New Zealand	36%	33%	-3%
Forming closer links and marketing co-operatively with the South Pacific	24%	20%	-4%
Promoting Regional Destinations	2%	1%	-1%
Other marketing initiatives	5%	14%	9%

10. NEW FACE OF AUSTRALIAN TOURISM

Table 17: The Need for a New Face of Australian Tourism

Need for a Face of Australian Tourism	
Yes	42%
No	42%
Can't say	16%

Table 18: Who or What Should be the Next Face of Australian Tourism

Unprompted Responses	
Hugh Jackman	13%
An Indigenous/ Aboriginal Person	11%
A Normal/ Real/ Ordinary Australian	6%
An Outback/ Bush Figure/ Someone From The Outback/ Bush	5%
Nature/ Wildlife/ Australian Landscape (Not A Person)	5%
Jennifer Hawkins	3%
Bindi Irwin	3%
Paul Hogan	3%
A Sports Person	2%
Lara Bingle/ The Where The Bloody Hell Are You Girl	2%
Skippy	2%
Cathy Freeman	2%
Kylie Minogue	2%
Dame Edna	1%

Note: The above table is based on a sample size of n = 102
It represents respondents who answered yes to the Need for a New Face of Australian Tourism