Tourism Research and National Long term Tourism Strategy

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Department of Resources, Energy and Tourism
Tourism Research Australia

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An overview of today's presentation

- State of the Industry
- National Long Term Tourism Strategy
- Tourism Research Advisory Board
- National Tourism Research Agenda
- Tourism Research Australia

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State of the Industry

The first “State of the Industry” report by TRA highlighted…..

- Tourism a significant part of the Australian economy with $34 billion GDP and half a million tourism jobs
- Past decade has been challenging with lower domestic overnight, little growth in international travel but rapidly growing outbound travel, and falling productivity
- Means a more competitive environment and new challenges for supply and demand
- New pressures – be innovative to increase profitability, productivity and investment

National Long Term Tourism Strategy

A policy framework for tourism industry to;

- ensure growth, flexibility and resilience,
- enable industry withstand long-term challenges and capitalise on the opportunities.
- help develop industry’s productive capacity,
- address the long term structural and regulatory reform requirements in the areas of infrastructure, investment, skills and labour, product development and quality.

Implementation of the Strategy

The Tourism Ministers' Council (TMC)

- To lead the implementation of the Strategy
- Cross portfolio engagement to identify issues/gaps
- Formation of nine working groups involving industry and government

Tourism Research Advisory Board – Functions

- Review and advise the Minister on the research work program and priorities to be undertaken
- Review current economic and industry policy environment
- Coordinate with other tourism and/or research related bodies to maximise the efficiency of the scope and scale of tourism research and minimise the risk of duplication
- Align supply and demand side research capabilities
- Report linkages between policy, marketing and industry development research findings
- Review opportunities to improve the dissemination of tourism research

National Tourism Research Agenda

Agenda objective

- provide the overarching research themes to enhance productive capacity;
- Improve communication and dissemination; and
- identify and track key areas to monitor the performance of the tourism industry.

National Tourism Research Agenda

Consultations

Agenda drew on an analysis of extensive formal and informal research including the:

- Jackson Report;
- KPMG Econtech study of research gaps;
- Sustainable Tourism Co-operative Research Centre research; and
- academic stakeholder consultation.

National Tourism Research Agenda

Ownership/engagement

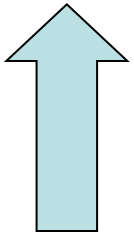
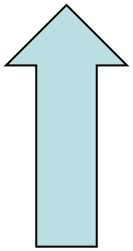
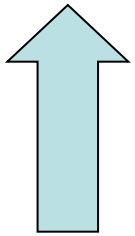
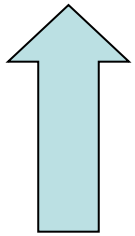
Government
NLTTS Working Groups,
States and regional tourism offices,
Industry associations
tertiary institutions
private enterprise

Note Academic membership on the Advisory Board
Currently is Professor Roy Ballantyne

Specific Focus of the Agenda

- Build on existing research efforts (off the Surveys)
- Strengthen the policy relevance of research
- Establish a new supply-side research capability for the tourism industry to complement existing demand side research
- Enhance data and research access to all points of the tourism industry value chain.

National Research Agenda Framework

			
Current market dynamics	Emerging trends	Capacity building	Research distribution pathways
Emerging trends on demand and supply side	Potential responses to market development	Productivity improvement to build sustainable capacity	Mechanisms to disseminate tourism information

Pillar 1: Current Market Dynamics

What: current economic and competitive market environment

Key Research Areas: productivity, flexibility (labour market, education and training), investment financing, innovation and consumer preferences, competitor analysis, regulation reform, niche markets, quality assurance, and distribution channels

Research Gaps:

Labour and Skills

- Attraction and Retention (incentives)
- Training
- Workforce Mobility

Investment and Regulatory Reform

- Infrastructure Investment
- Development and Regulation
- Impediments to reinvestment
- Impediments to Infrastructure Development

Pillar 2: Emerging Trends

What: Identify and monitor the likely impact of long- term emerging issues that will impact on the tourism

Key research Areas: Examine demographic trends, climate change, geo-political changes

Research Gaps:

Industry Resilience

- Climate Change
- Disaster Management and Recovery

Pillar 3: Capacity Building

What: sustainable productivity improvements to develop sustainable capacity and flexibility to allow industry to quickly respond to endogenous and exogenous challenges and opportunities

Key Research Areas: Examine how current market dynamics and emerging trends will affect the industry and possible responses to meet these challenges

Research Gaps:

Quality Assurance and Accreditation

- Benchmarks of Quality
- Measures of National Satisfaction and Expectations
- Customer Service Education
- Evaluation of current accreditation systems and their relevance to the consumer

Pillar 4: Research Distribution Pathways

What: Develop an understanding of the available mechanisms to promulgate relevant tourism related research and analysis to all points of the industry value chain

Key Research areas: Reviewing existing diffusion methods and developing new products and services and developing an industry outreach program to facilitate industry input into the agenda

Research Gaps:

Distribution of Quality Australia Product

- Tourism Internet behaviour
- Communication with new and emerging consumer groups
- Industry use of technology

TRA research

Economic and Industry Analysis	Regional Research	Forecasting and Modelling	National Surveys
• State of the Industry • Research and Statistics • Tourism Productivity • Indigenous Tourism Profile • Strategy Working Group Projects – Input and Advice • Innovation • Tourism Investment • Tourism Contribution • Tourism Businesses • Regional Employment • StatsLine • Industry Snapshots • R & D Advisory Board	• Destination Visitor Survey program • Maintenance of DVS Benchmark database • Regional Expenditure Estimates • Regional Profiles	• TFC forecasts • TNQ forecasts • TNT forecasts • Managing the Production of State TSA and CGE Modelling • Tourism Forecasting Committee Total Inbound Economic Value (TIEV) • Total Domestic Economic Value (TDEV)	• IVS • NVS • Tourism Research Committee • Survey Methodology and Maintenance • Electronic reporting • CD MOTA (desktop data tool) • Administration of SLA arrangements for IVS and NVS

Dissemination (core within all teams)

…and the Tourism Research Audit Database

At: http://www.ret.gov.au/tourism/tra/about/adb/Pages/default.aspx

- Lists over 1,300 research items
- Downloadable Excel workbook
- Plan to update it on a regular basis

Further discussions

See thread on STCRC Portal

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Questions?

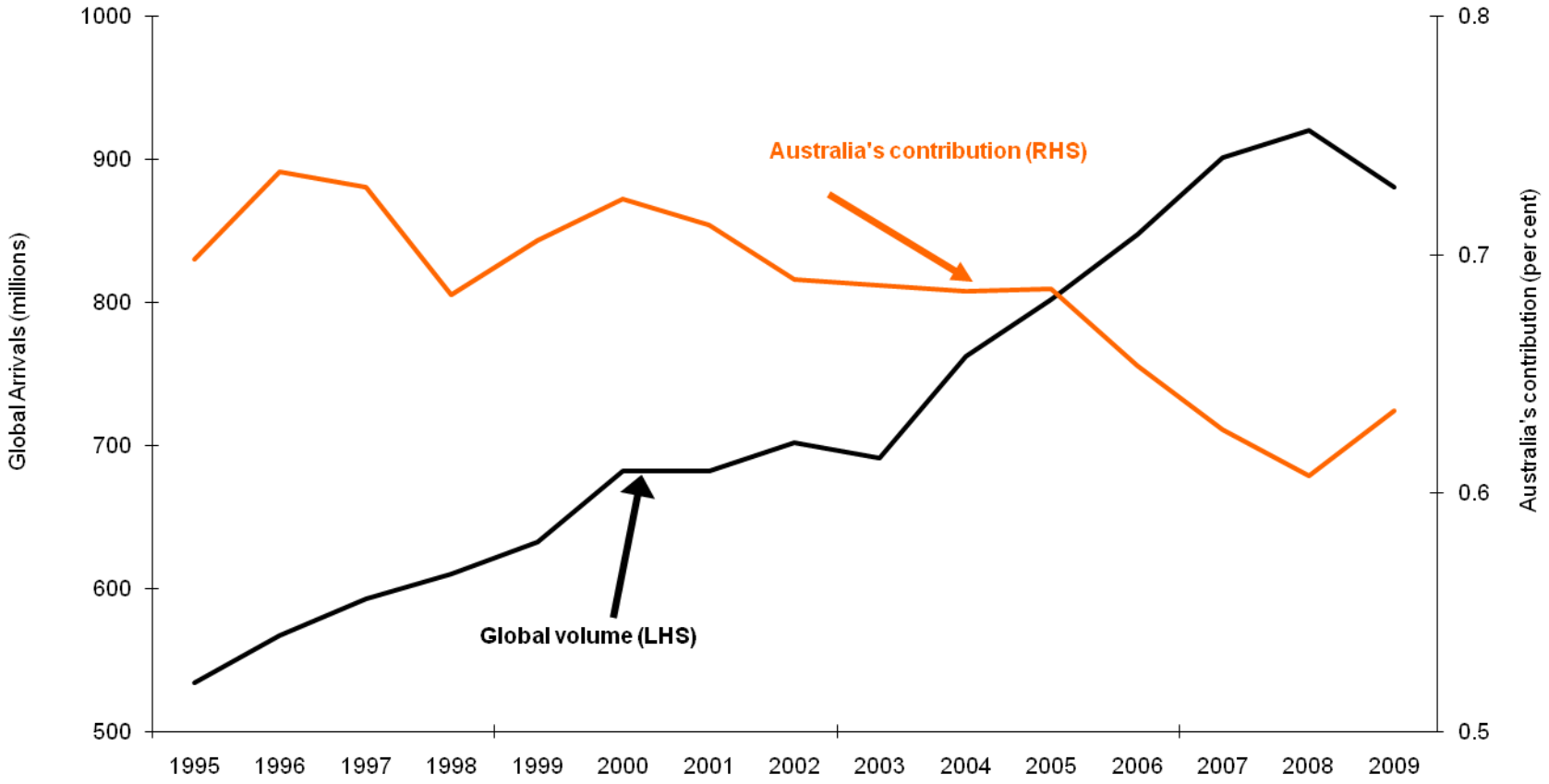
Tourism Research Australia:
www.ret.gov.au/tra

National Long-Term Tourism Strategy:
www.ret.gov.au/tmc/nltts

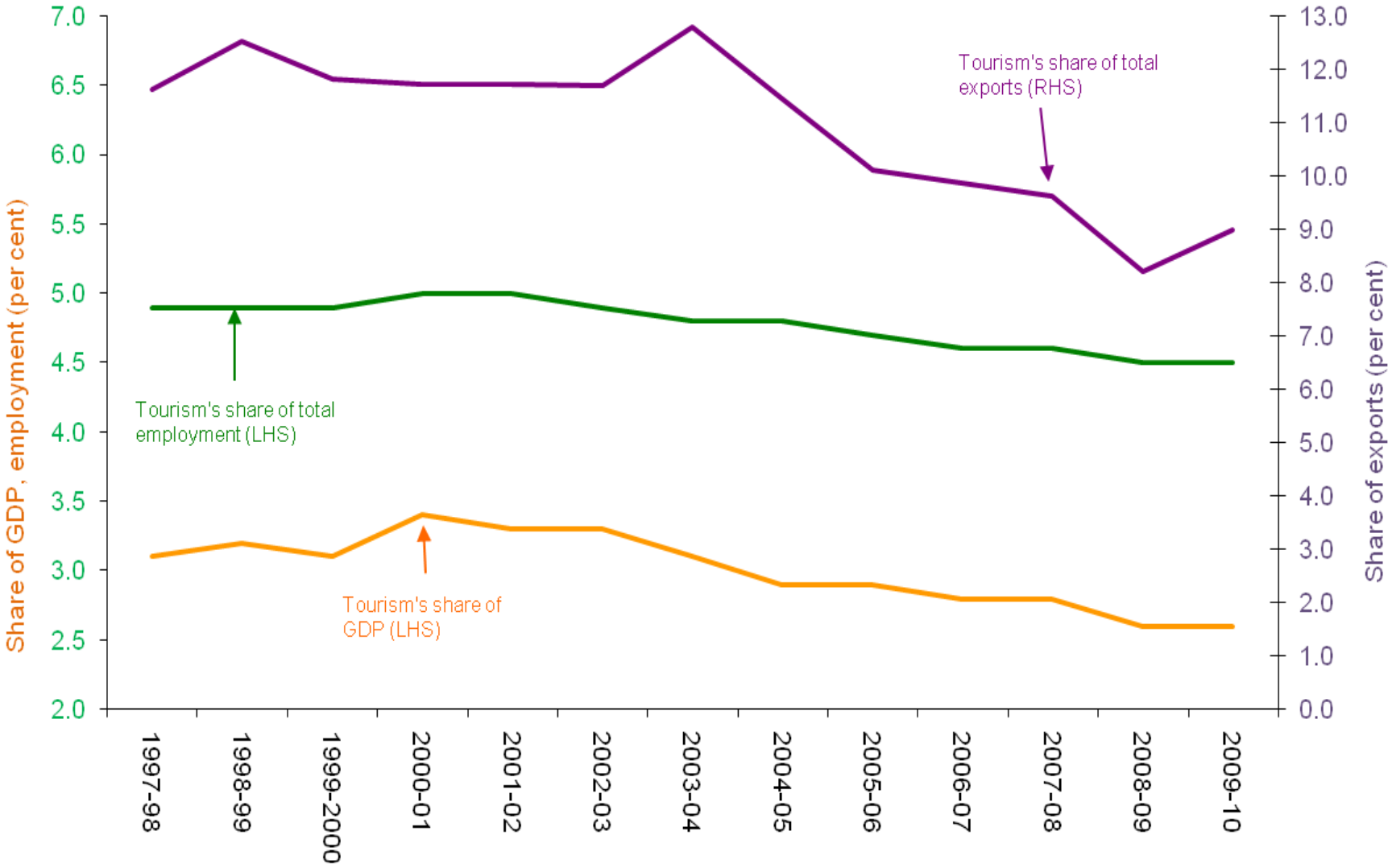
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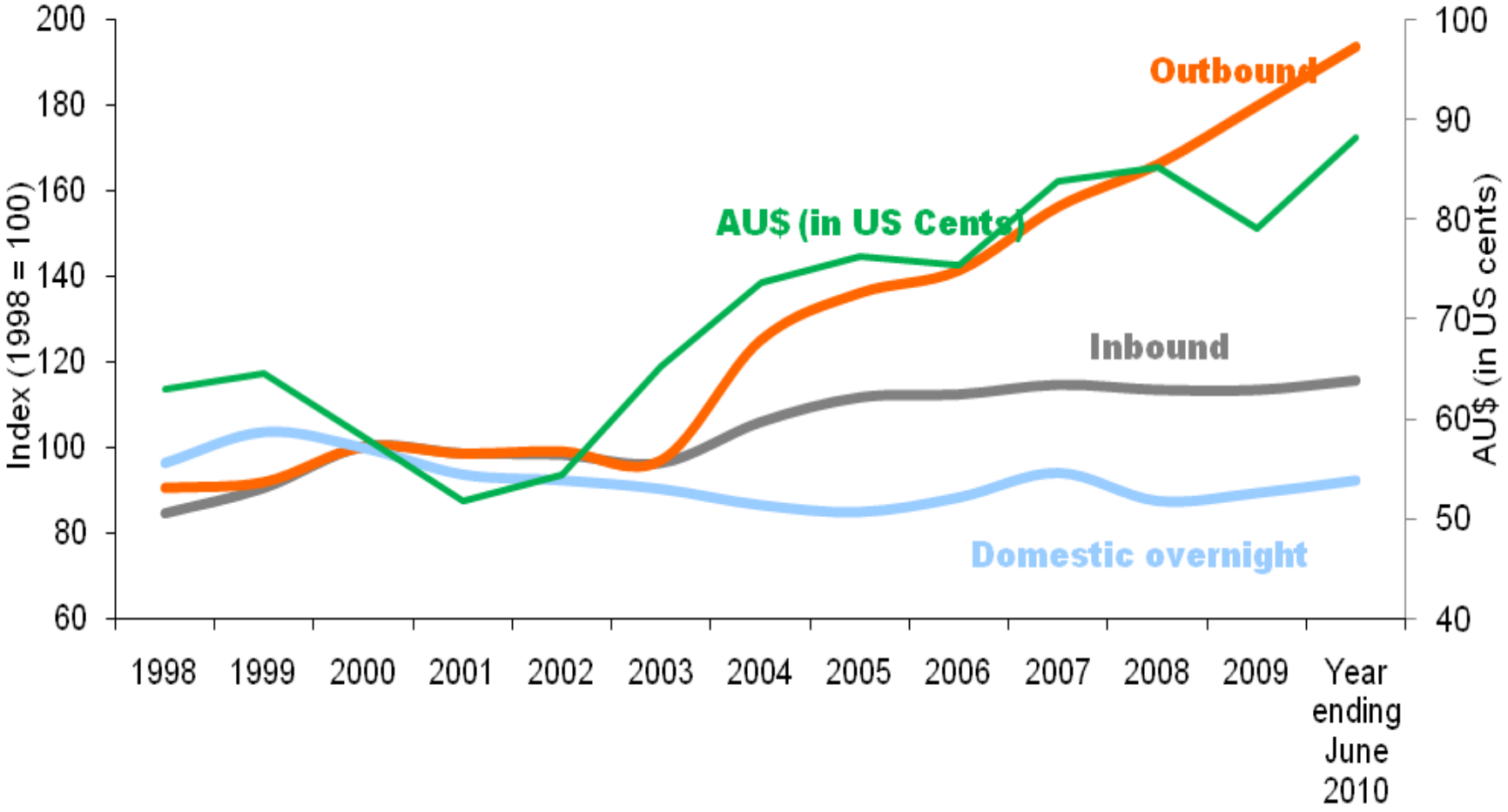
Global Comparison



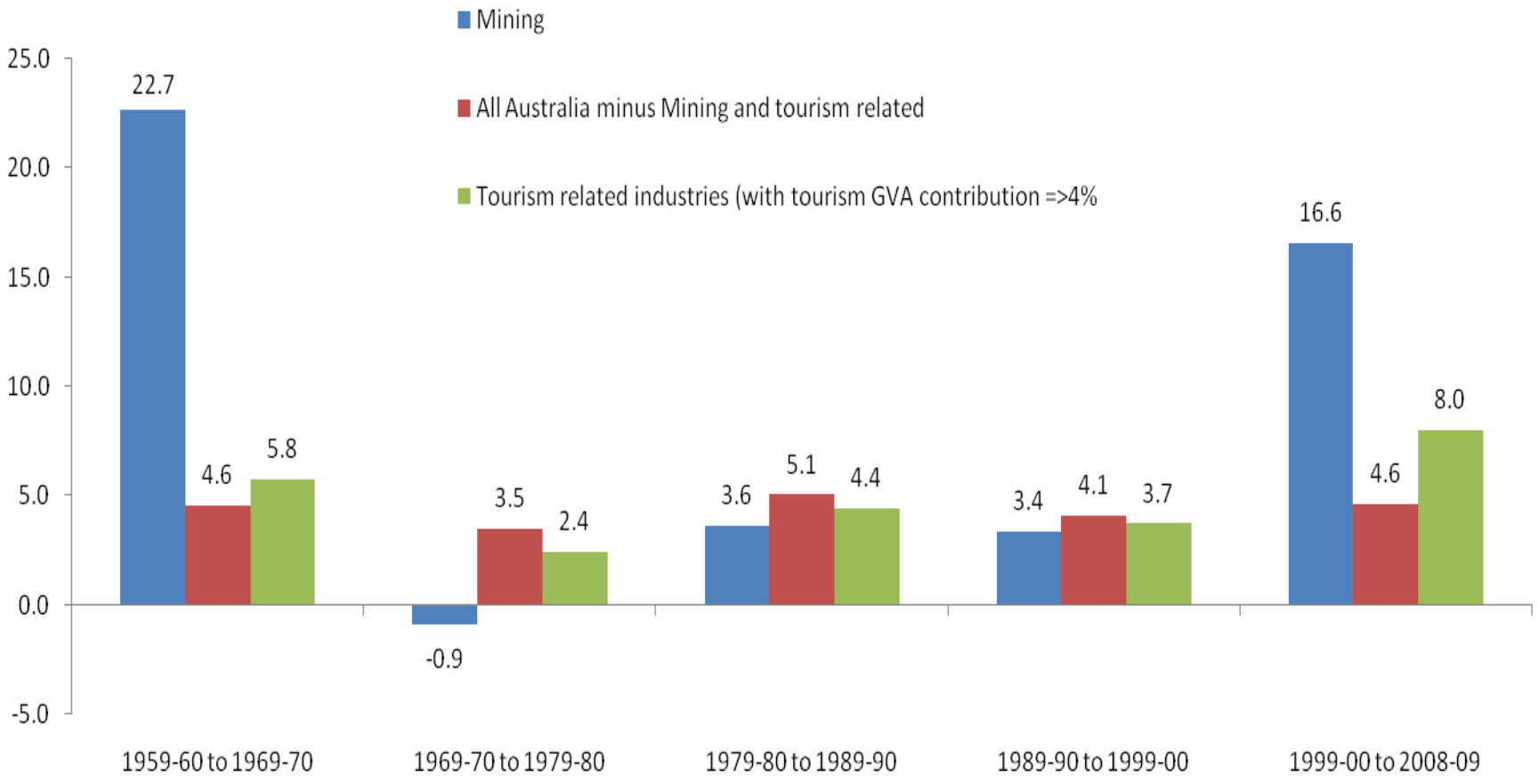
National Comparison



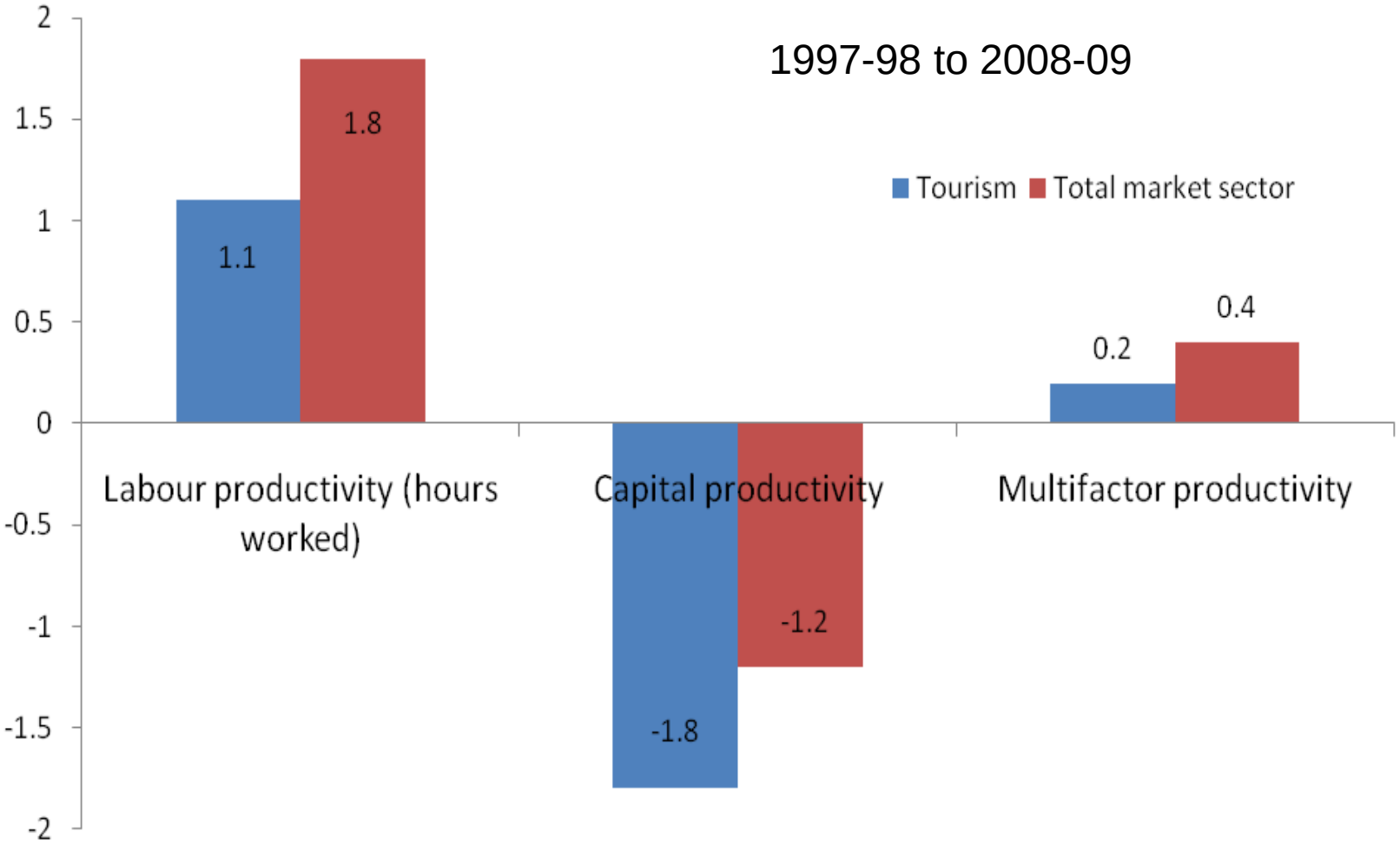
Tourism Sectors



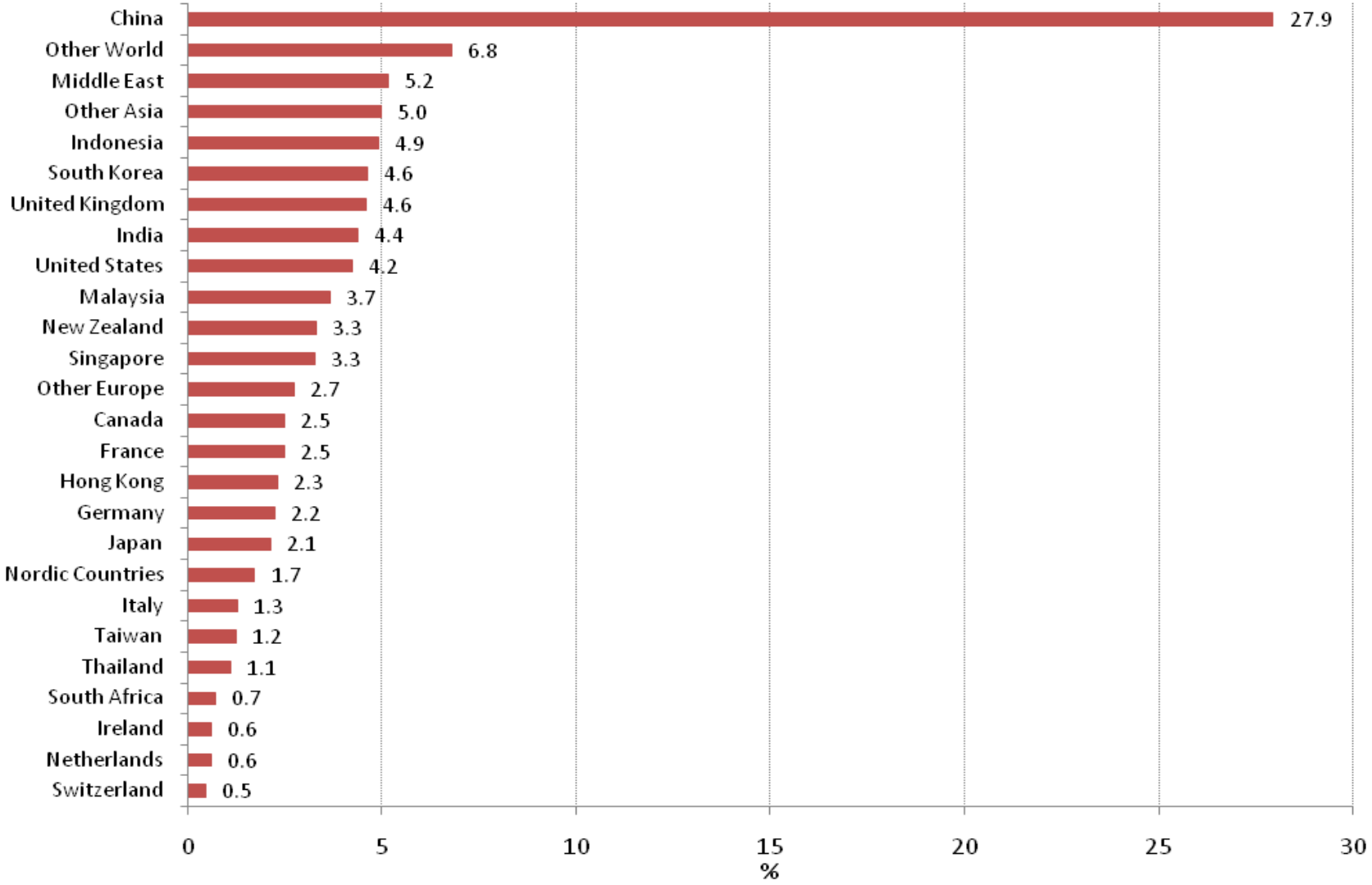
Tourism Supply Side - Investment



Tourism Supply Side - Productivity



Future Challenges



The Agenda: Progress to Date

To date the Advisory board:

- guided Tourism Research Australia's preparatory work on the development of the Agenda.

- oversight of the conduct of an audit of tourism research by KPMG and TRA to identify research gaps.

- Identified four key themes or pillars to build future research capacity based on gap analysis and other research.
    - Current market dynamics;
    - Emerging trends;
    - Capacity building; and
    - Research distribution pathways

The key research gap areas

- Labour and Skills
    - Attraction and Retention (incentives)
    - Training
    - Workforce Mobility
- Investment and Regulatory Reform
    - Infrastructure Investment
    - Development and Regulation
    - Impediments to reinvestment
    - Impediments to Infrastructure Development
- Industry Resilience
    - Climate Change
    - Disaster Management and Recovery
- Quality Assurance and Accreditation
    - Benchmarks of Quality
    - Measures of National Satisfaction and Expectations
    - Customer Service Education
    - Evaluation of current accreditation systems and their relevance to the consumer
- Distribution of Quality Australia Product
    - Tourism Internet behaviour
    - Communication with new and emerging consumer groups
    - Industry use of technology

Strategy Working Groups Current Projects

- **Labour and Skills** Profile of tourism labour market by tourism regions
- **Investment**
  - Determine whether tourism investment is disadvantaged by regulatory arrangements
  - Review regulatory provisions that impede tourism business
  - A framework guide to facilitate tourism investment Product Gap audit
- **Destination Planning**
  - Evaluation of tourism data Pilot EDS – Flinders Range
  - Pilot EDS - Cairns/Townsville
- **Tourism Access** Increasing knowledge of Australia's regional packages Aviation mapping
- **Resilience** Economic impacts of projected climate change trends on the tourism industry
- **Quality** NTAF risk assessment Technical enhancements to ATDW to support NTAF online
- **Indigenous** Nil
- **Digital Distribution** Development of online strategy for tourism Digital benchmarking for tourism
- **Research and Development Advisory Board**
  - Tourism Communication Pathways Project
  - Medical Tourism Scoping Study