

Tourism research and the National Long-Term Tourism Strategy

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Australian Government
Department of Resources, Energy and Tourism
Tourism Research Australia



TRA **TOURISM
RESEARCH
AUSTRALIA**

An overview of today's presentation

- National Long-Term Tourism Strategy
- Tourism Research Advisory Board
- National Tourism Research Agenda
- Tourism Research Australia

National Long-Term Tourism Strategy

Why do we need a long-term strategy:

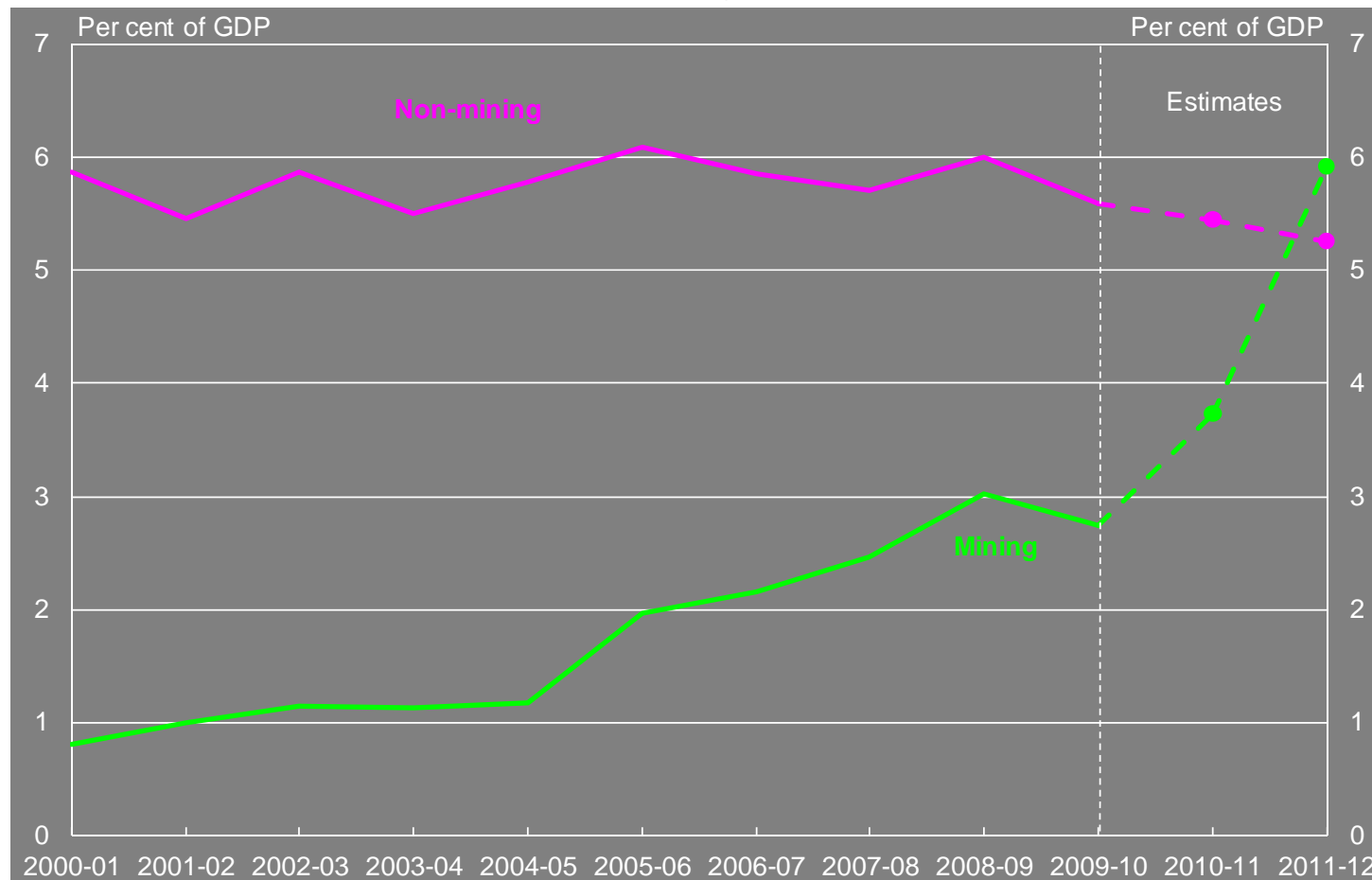
- tourism is a significant industry within the Australian economy
- past decade has been challenging with internal consumption flat and a widening tourism-trade deficit
- demand side responses well developed – not so the supply side policy
- tourism operates in a economy of finite resources – those resources should be channelled to areas which maximise economic returns
- the industry needs integrated supply and demand policies

National Long-Term Tourism Strategy

Why do we need a long-term strategy?

To encourage investment

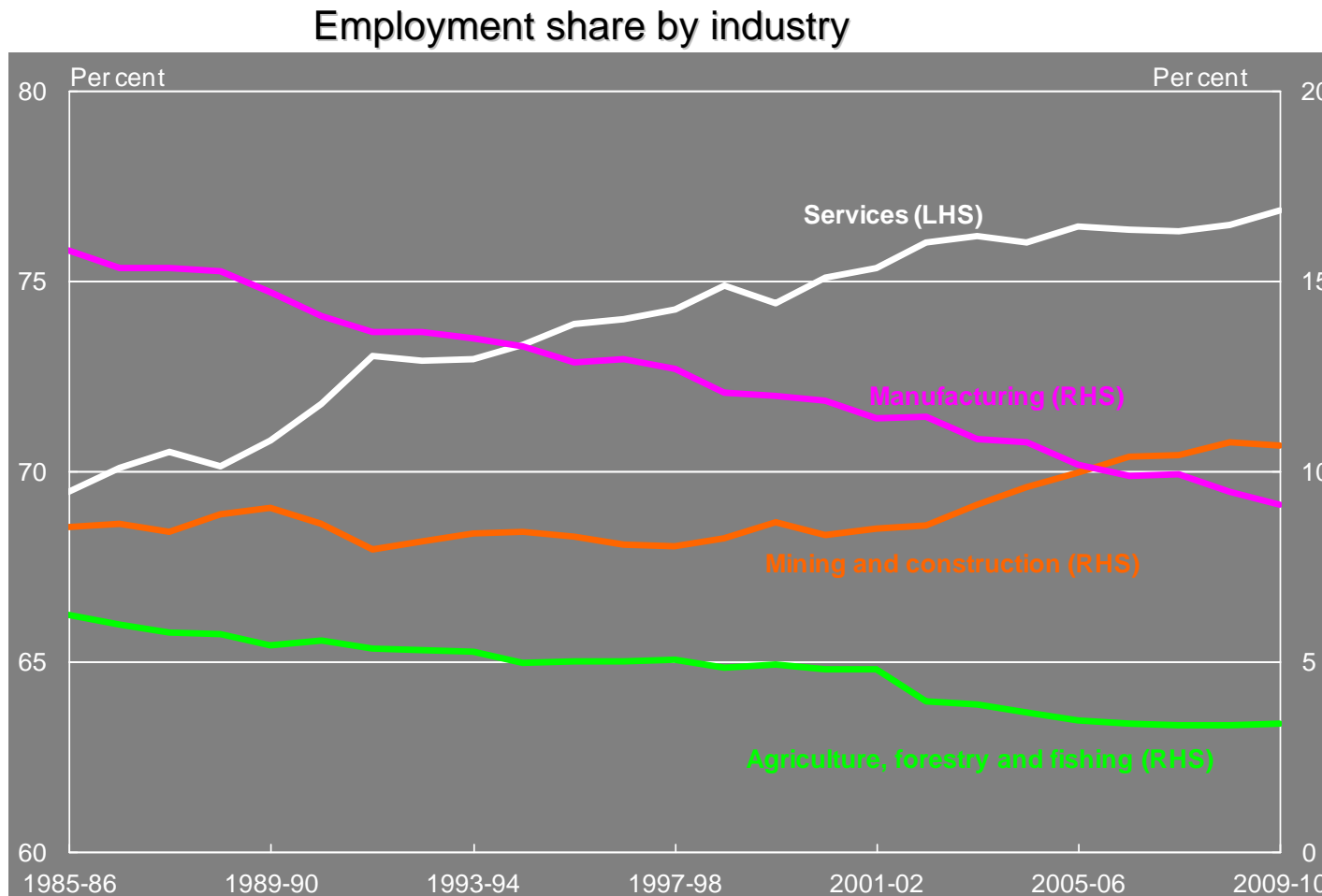
Investment by sector



Source: ABS

National Long-Term Tourism Strategy

Why do we need a long-term strategy?
So tourism can attract an adequate supply of labour

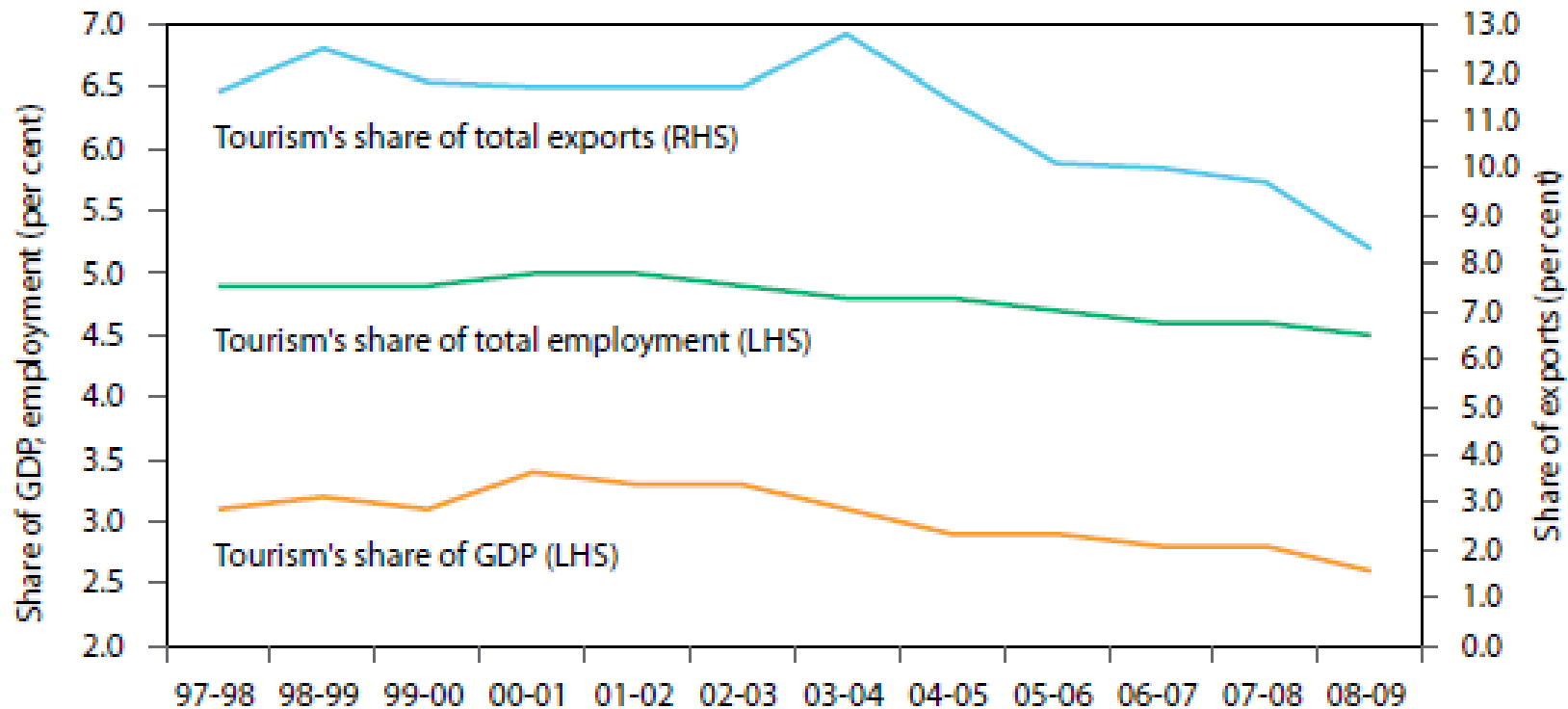


Source: ABS

National Long-Term Tourism Strategy

Why do we need a long-term strategy?
To ensure tourism can maximise its net economic contribution
within a three-speed economy

Tourism's declining role in the economy



National Long-Term Tourism Strategy

A policy framework for the Australian tourism industry to:

- Enhance the industry's productive capacity
- enable industry to withstand long-term challenges and capitalise on the opportunities
- address the long term structural and regulatory reform requirements in the areas of infrastructure, investment, skills and labour, product development and quality

...supported by all states and territories at Ministerial level

Tourism Research Advisory Board

Working Group charged with developing a strategic research agenda

- 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

Tourism Research Advisory Board

Current focus of the Tourism Research Advisory Board

- Build on existing research efforts (e.g. off TRA's 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
- Develop the National Research Agenda Framework
 - identify research gaps
 - prioritise research
 - develop strategic research partnerships

Tourism Research Advisory Board

Outcomes of 10 March 2011 Advisory Board meeting:

- endorsed a revised draft *Tourism Research Agenda Framework* and associated 'project matrix'
- planned for the 2011 Tourism Directions Conference
- requested a review of all proposed research projects – scope, objectives, research questions, timeframe and budget
- heard a report from the Digital Distribution Working Group on the development of a Digital Research Agenda and agreed to work together on future projects and priorities
- noted plans are well underway for the Australia-China Summit in June 2011

Research gaps identified

- **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

Research gaps identified

- **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

Tourism Research Agenda Framework

What is it?

- A mechanism that seeks to address underlying policy objectives through identifying gaps in tourism research

How does it work?

- Strategy and TRA research categorised against research pillars identified in the draft National Tourism Research Agenda

Why do we need it?

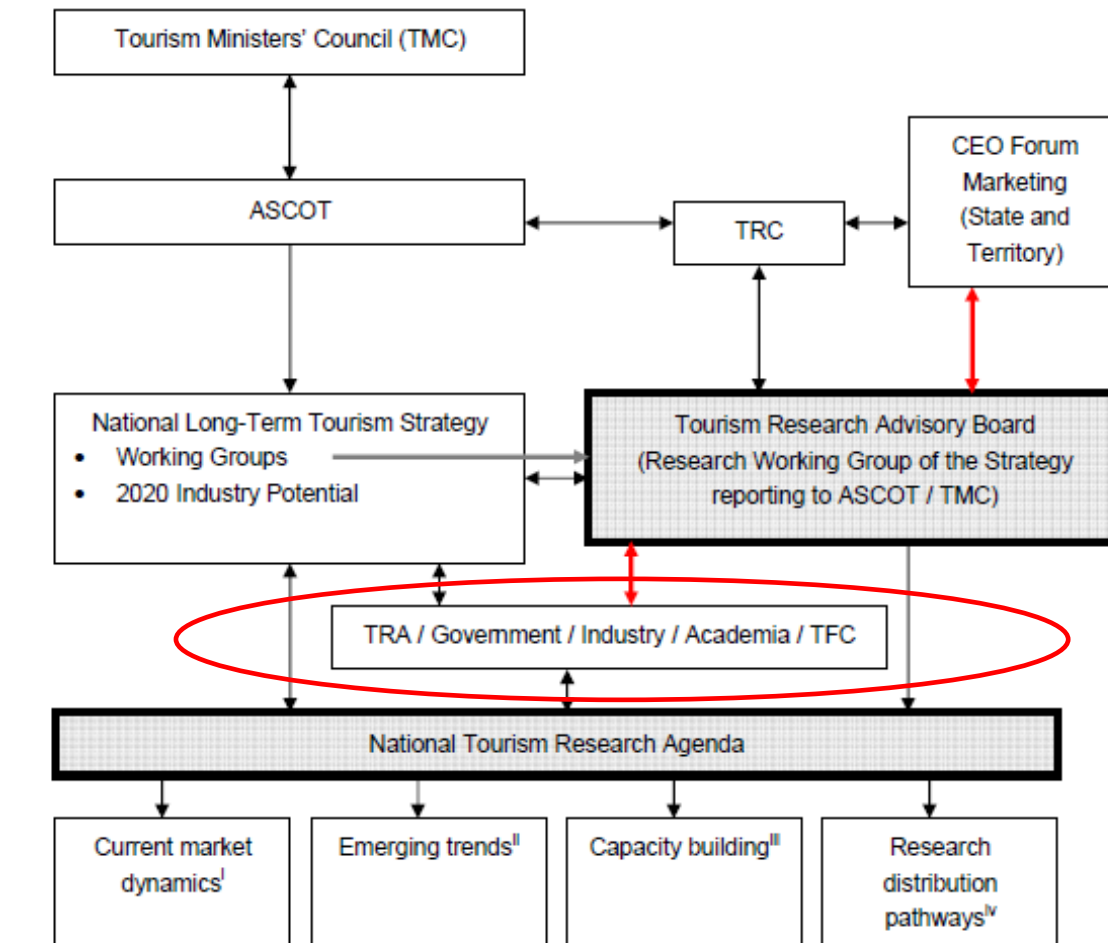
- To strengthen the policy relevance of research and enhance data and research access to all points of the tourism industry value chain.

How is it managed?

- Designed to facilitate engagement by all tourism research stakeholders and coordinated by Advisory Board Secretariat

Tourism Research Agenda Framework

National Tourism Research Agenda: structure and research pillars



↔ Two-way flow of information from Advisory Board member and respective stakeholder

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 Ranges
 - Pilot EDS: Cairns/Townsville

Strategy Working Groups Current Projects

- **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

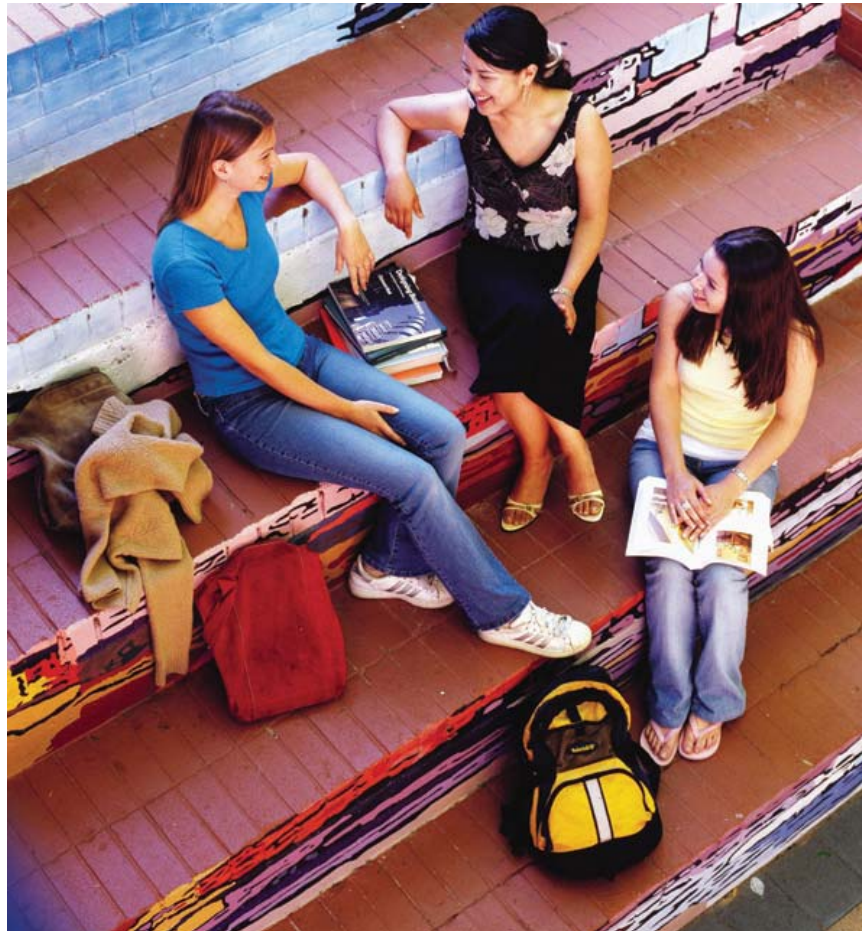
Strategy Working Groups Current Projects

- **Digital Distribution**
 - Development of online strategy for tourism
 - Digital benchmarking for tourism
- **Research and Development Advisory Board**
 - National Tourism Research Agenda
 - Tourism Directions conference
 - State of the Industry Report

TRA research

Economic and Industry Analysis	Regional Research	Forecasting and Modelling	National Surveys
<ul style="list-style-type: none">• State of the Industry• Research and Statistics• Tourism Productivity• Strategy Working Group Projects – Input and Advice• Innovation• Tourism Investment• Tourism Contribution• Tourism Businesses• Regional Employment• StatsLine• Industry Snapshots• R & D Advisory Board	<ul style="list-style-type: none">• Destination Visitor Survey program• Maintenance of DVS Benchmark database• Regional Expenditure Estimates• Regional Profiles	<ul style="list-style-type: none">• 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)	<ul style="list-style-type: none">• 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)			

TRA Online



Questions?

Tourism Research Australia:

www.ret.gov.au/tra

National Long-Term Tourism Strategy:

www.ret.gov.au/tmc/nlts

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See thread on STCRC Portal

www.sustainabletourisonline.com

(go to 'online community')