

National Long-Term
Tourism Strategy

The National Long-Term Tourism Strategy

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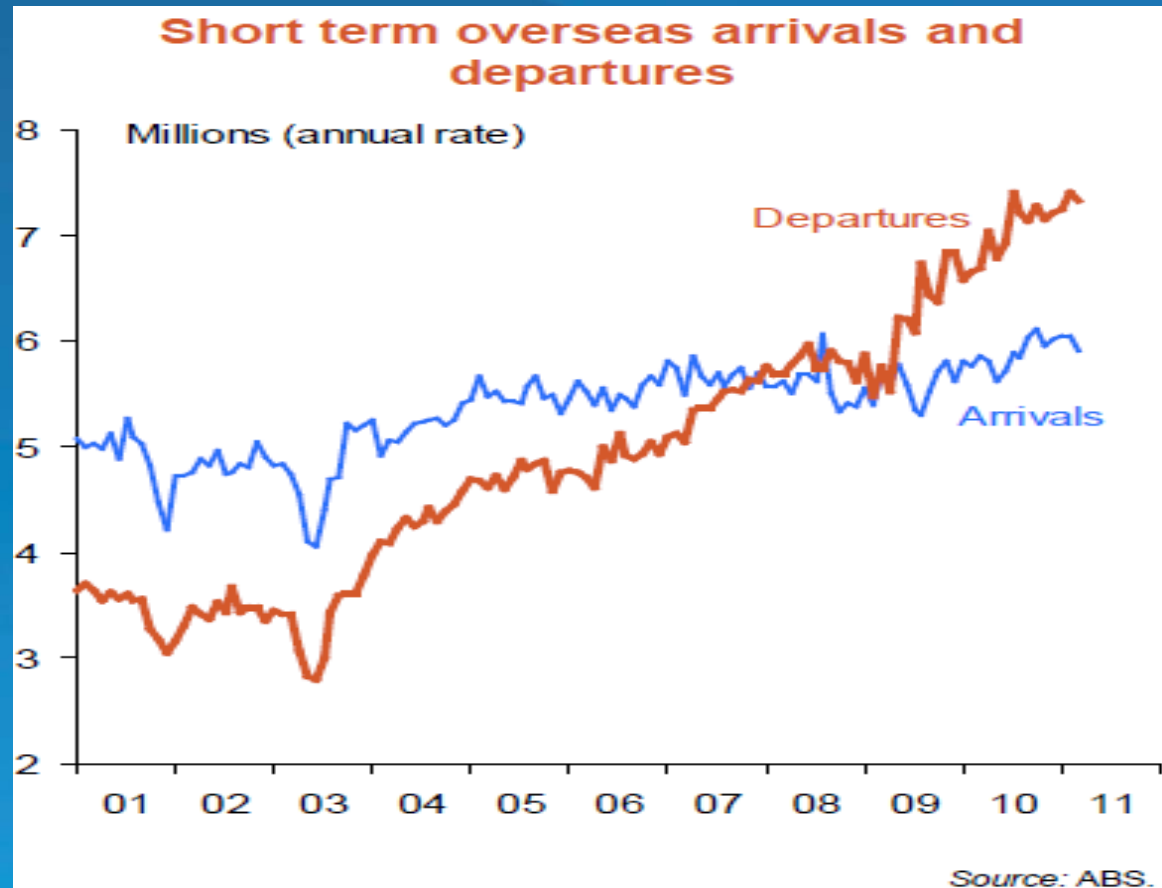


Australian Government



Why have a Strategy?

- A\$34 billion contribution to GDP & 500,500 employed in 2009-10
- Fierce/ intensifying international competition
- History of demand side focus



Background – what is the Strategy?

- The National Long-Term Tourism Strategy (the Strategy) was launched on 15 December 2009 by the Hon Martin Ferguson AM MP, Federal Minister for Tourism.
- A micro-economic reform agenda for tourism.
- Outlines the long-term policy framework for positioning the Australian tourism industry.
- Supported by state and territory tourism ministers, with active industry involvement.

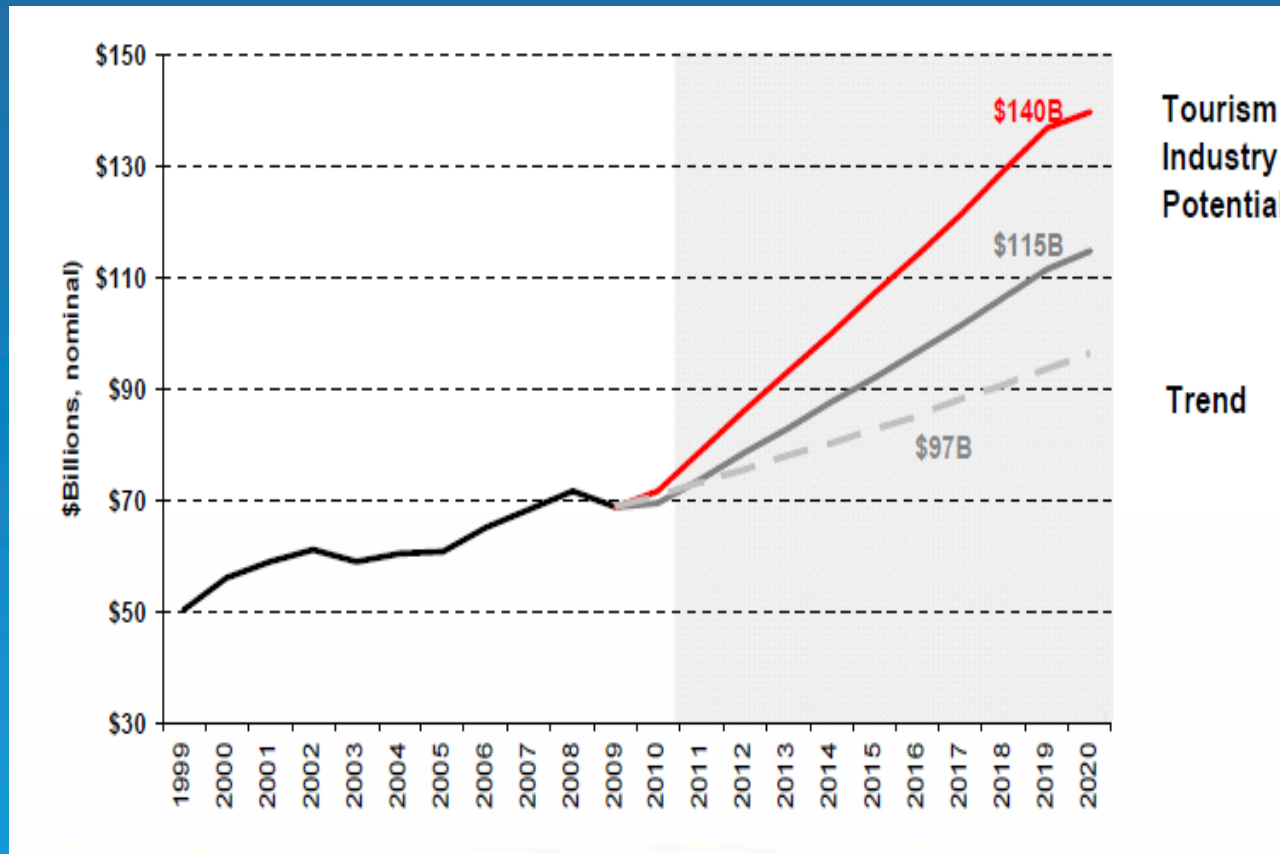
Purpose

- **Goal:** Maximise the economic benefit of the tourism industry to Australia.
- **Focus:** Develop the productive capacity of the tourism industry – ensure growth, flexibility, resilience.
- The Strategy aims to:
 - > Address labour and skills shortages
 - > Remove barriers to investment
 - > Increase the quality of Australia's tourism product and its online distribution
 - > Improve access
 - > Enhance research capability

2020 Tourism Industry Potential

- Developed in 2010, outlines some ambitious growth challenges for the Australian tourism industry to achieve by 2020.
- Critical to align progress on the Strategy with these challenges.
- Key strategic areas of focus for the 'Potential':
 - > Improve dispersal.
 - > Strategic aviation growth.
 - > Attract investment in a more appealing Australia of tomorrow.
 - > Improve capital efficiency.
 - > Build labour and skills capacity and productivity.
- Realisation of 'Potential' dependent on achievement of supply-side objectives of the Strategy.
- Galvanises industry and all levels of government to work together to become more competitive.

2020 Tourism Industry Potential



- Overnight tourism expenditure to increase from A\$115b to A\$140b
- International spend from 38% to 45% by 2020
- Domestic spend from 62% to 55% by 2020

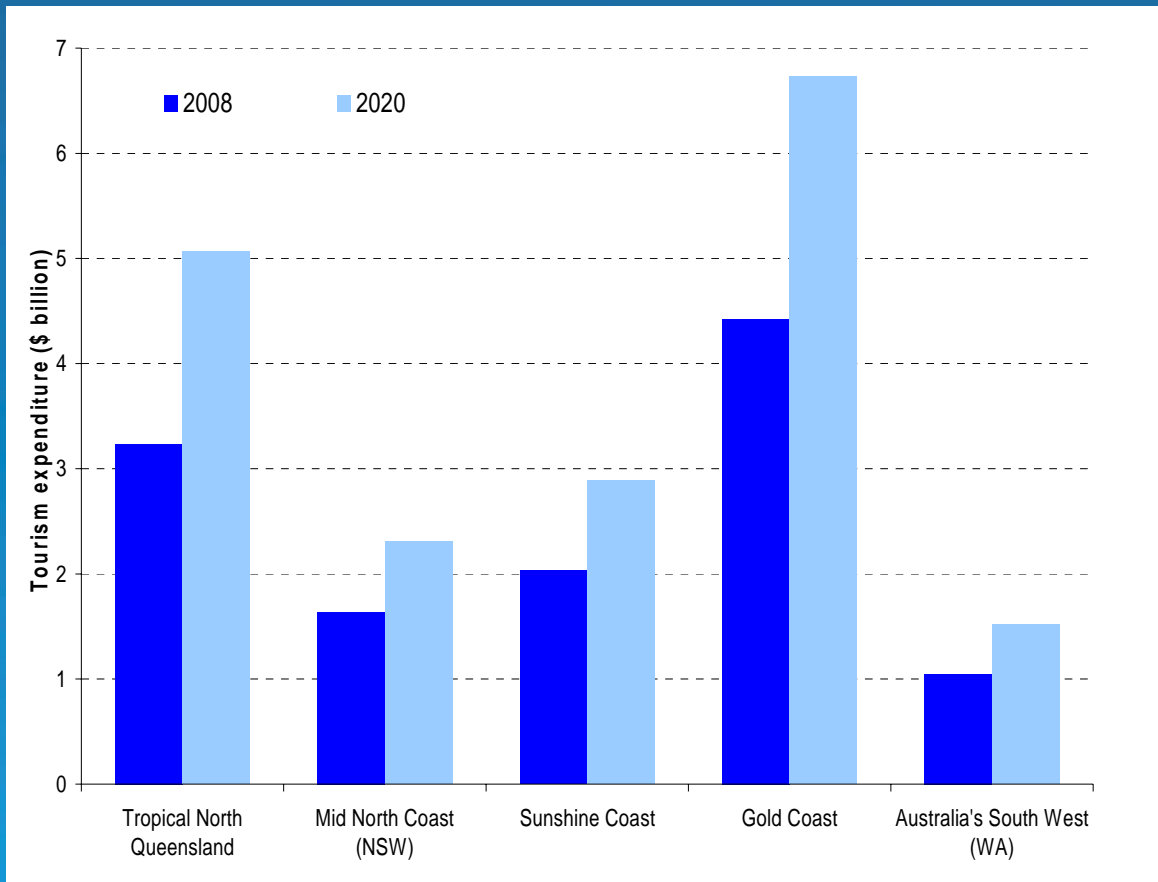
How is it led?



What does it mean in practice?

- The TMC agreed on an initial Work Plan in December 2009.
- Working Groups progressing TMC work program:
 - > A set of 41 initial priority actions were outlined, with 33 actions completed to date
- A collaborative budget of A\$2.2 million was committed to achieve these actions for 2009-10 and 2010-11.
- Key projects completed or nearing completion:
 - > Profiling of tourism labour market by regions to identify 'hot spots'.
 - > Examination of impediments to tourism investment and best practice investment facilitation.
 - > Mapping of aviation access priorities.
 - > Examination of economic impacts of climate change.
 - > Development of a national online strategy for tourism.

Destination Management Planning



Source: Access Economics

Stronger growth expected in tourism reliant regions

- Experience development planning
- Best practice

Destination Management Planning Working Group

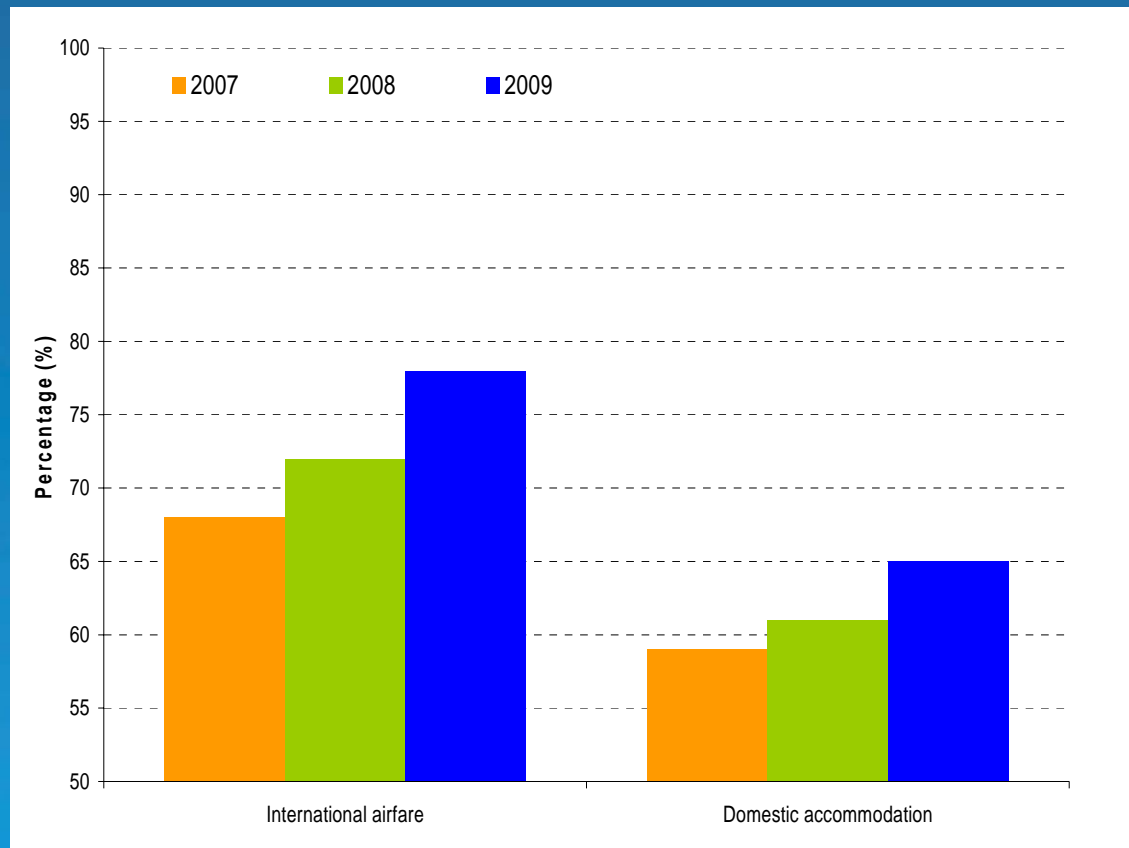
- Role: to drive the development and adoption of destination development plans.
- Key achievements:
 - > Promotion of a comprehensive package of best practice models on destination management planning.
 - > Two Experience Development Strategy studies underway to pilot the development of tools to help regions produce destination management plans.

More info: ret.gov.au/tourism/tmc/workinggrps/dest/

Experience Development Strategies

- An Experience Development Strategy (EDS) is a specialist strategy focused on identifying and developing world class experiences that visitors seek.
 - An EDS is not a broad destination management plan, but a more focused strategy which should complement and inform destination management planning.
 - An EDS should identify commercial opportunities, access issues, investment potential, skills and labour requirements, conservation opportunities, marketing needs, visitor management issues, product development and infrastructure requirements as they relate to the visitor experience.
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Digital Distribution



Source: Tourism Research Australia

Assist businesses to take advantage of technology

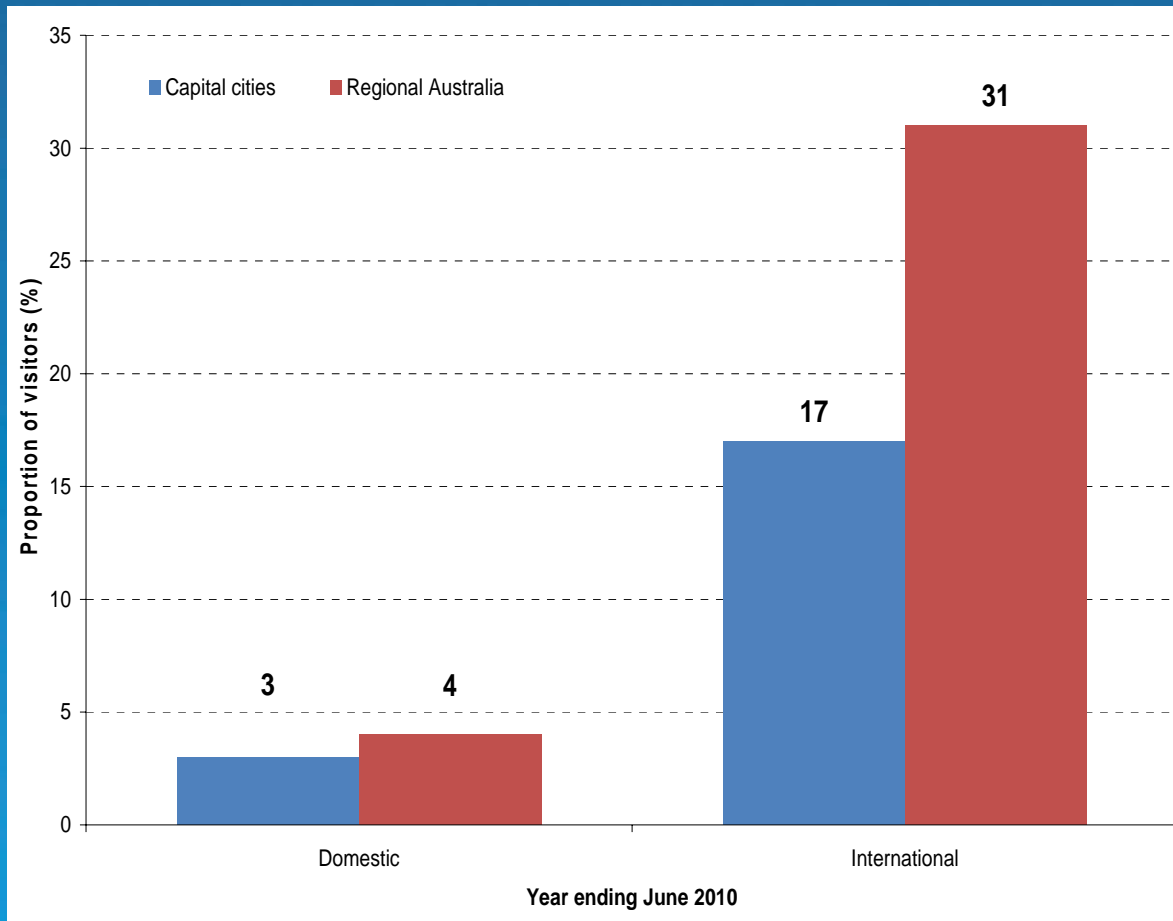
- National Online Strategy for Tourism (NOST)
- Improve online presence
- Improve online capability

Digital Distribution Working Group

- Role: to assist businesses to take advantage of technology by improving online presence and capability.
- Key achievements:
 - > Development of the National Online Strategy for Tourism (NOST).
 - > Development of the Digital Distribution Action Plan, which assists Australian businesses to improve their online presence and capability.

More info: ret.gov.au/tourism/tmc/workinggrps/digital

Indigenous Tourism



Supporting the development of Indigenous tourism

- Product
- Employment
- Skills

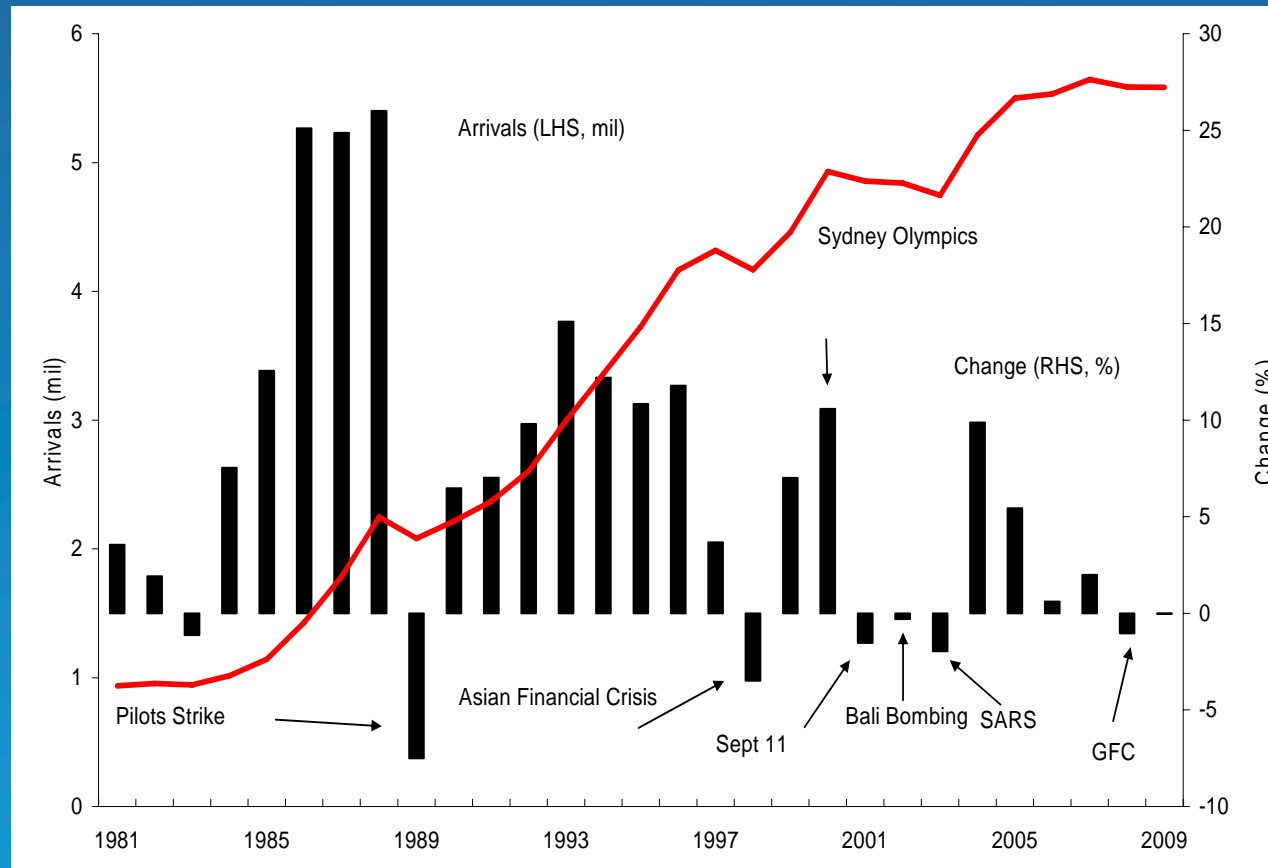
Source: *Tourism Research Australia*

Indigenous Tourism Working Group

- Role: to examine ways to improve the quality and quantity of Australia's indigenous tourism product offering and maximise the participation of Indigenous Australians in the tourism industry.
- Key achievement:
 - > Collation and communication of programs and resources available to aid Indigenous tourism business development and facilitate Indigenous employment in tourism.

More info: ret.gov.au/tourism/tmc/workinggrps/Indigenous

Industry Resilience



Plan for shocks and demographic and other changes

- Shocks are inherent
- Climate change
- Exchange rate

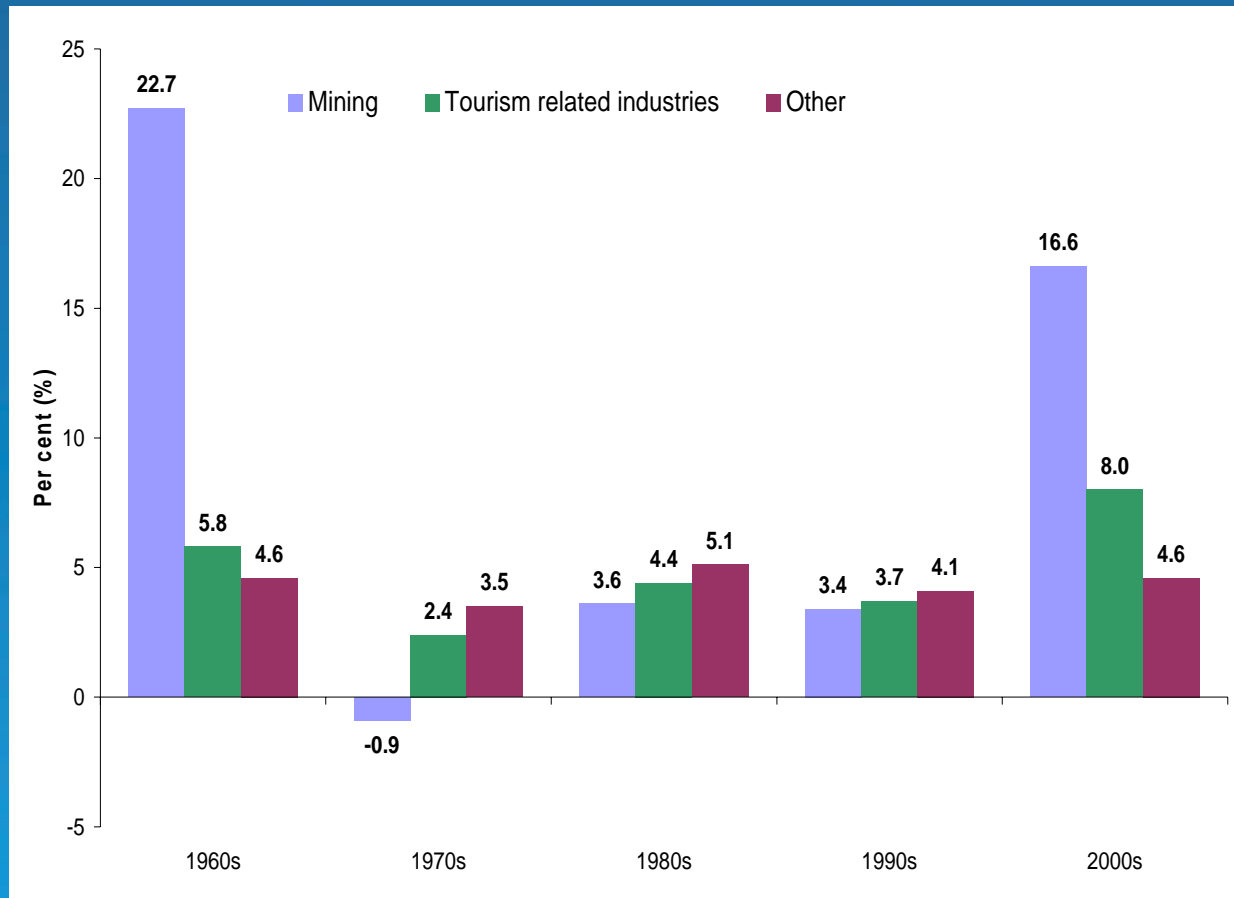
Source: Australian Bureau of Statistics; Department of Resources, Energy and Tourism

Industry Resilience Working Group

- Role: to assist the tourism industry by identifying ways to plan and better cope with challenges.
- Key achievements:
 - > Collation and communication of a comprehensive list of programs to assist businesses in meeting the challenges of adapting to climate change, enhancing resilience and addressing crisis management.
 - > Examination of the economic impacts of climate change on the tourism industry.

More info: ret.gov.au/tourism/tmc/workinggrps/industry

Investment and Regulatory Reform



Increase industry investment

- Regulation
- Investment
- Land planning use

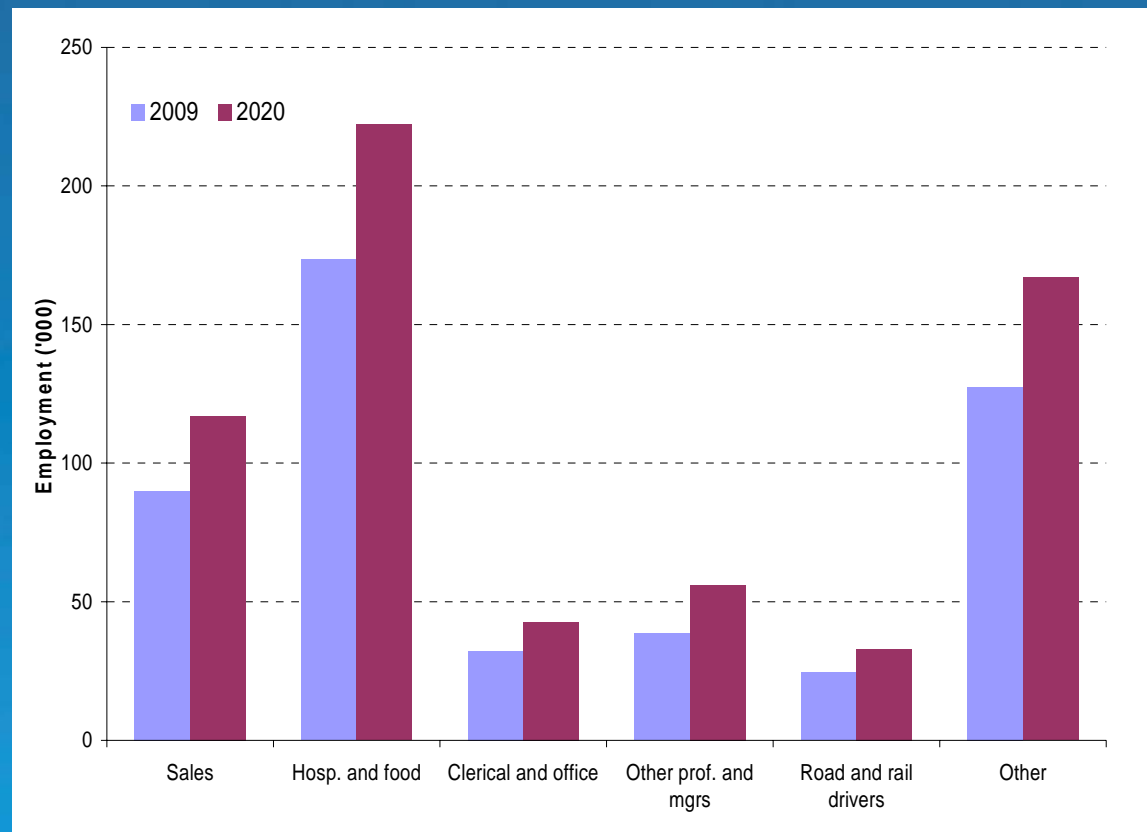
Source: Department of Resources, Energy and Tourism

Investment and Regulatory Reform Working Group

- Role: to develop a detailed understanding of tourism investment barriers and drivers, toward encouraging greater investments.
- Key achievements:
 - > Development of a National Tourism Planning Code outlining best practice standards for tourism planning and property development.
 - > Assessment of regulatory barriers to new tourism investment and development of best-practice investment facilitation guidance.

More info: ret.gov.au/tourism/tmc/workinggrps/invest

Labour and Skills



Source: Access Economics

Strong growth in industry labour required

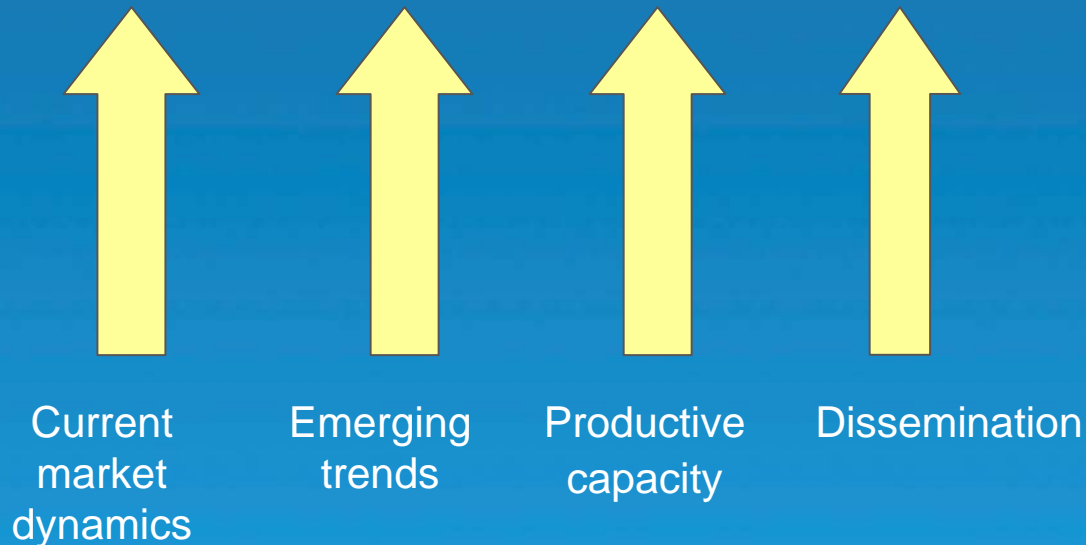
- Increasing labour force numbers
- Regional 'hot spots'
- Labour mobility

Labour and Skills Working Group

- Role: to improve the tourism and hospitality industries' ability to attract and retain labour through better workforce planning, innovative recruitment initiatives and improved training and career opportunities.
- Key achievements:
 - > National surveys to identify tourism labour and skills needs in Australian regions.
- More info: ret.gov.au/tourism/tmc/workinggrps/labour

Tourism Research

National Research Agenda



Deliver strategic research that is timely, relevant and reliable for industry decision-making

- Tourism Research Australia
- *State of the Industry Report*
- Tourism Directions Conference

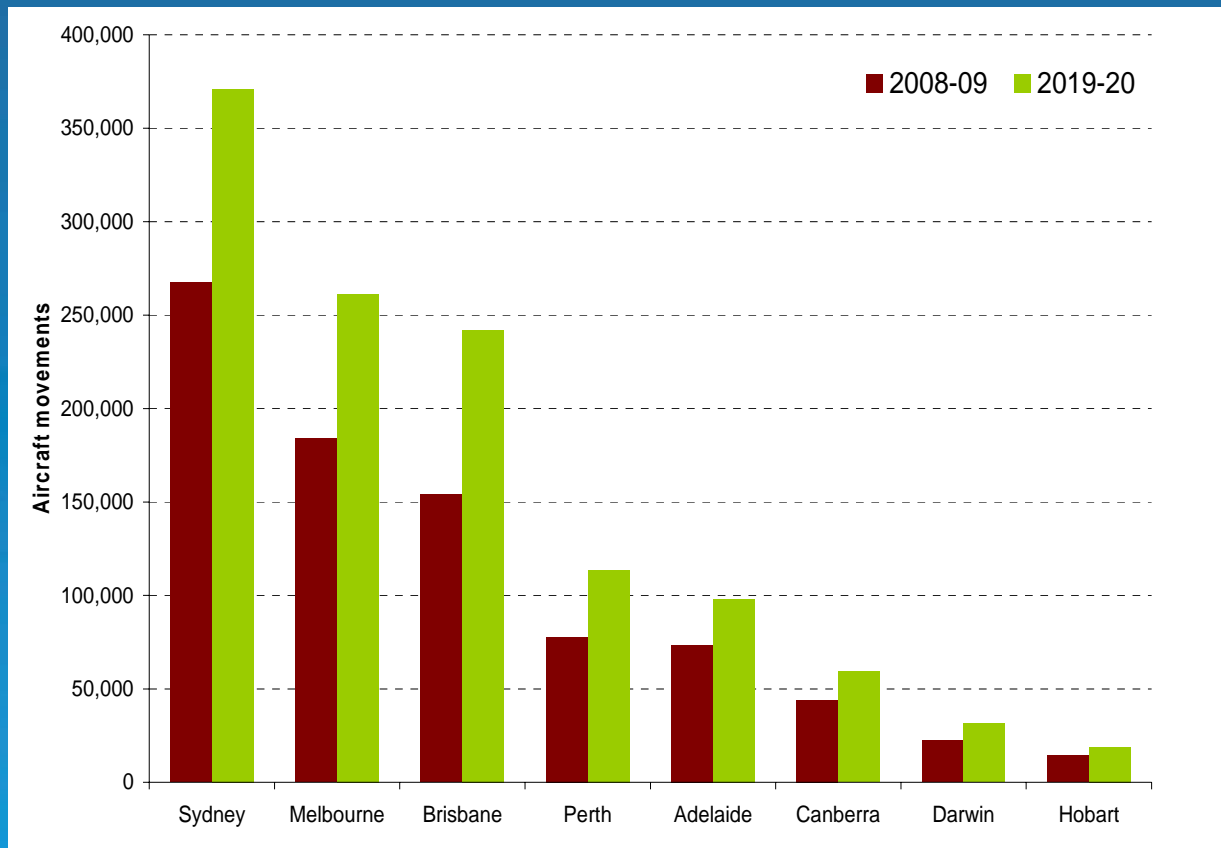
Source: Department of Resources, Energy and Tourism

Research Advisory Board

- Role: to deliver strategic research that is timely, relevant and reliable for industry decision-making.
- Key achievements:
 - > Development of a National Tourism Research Agenda that underpins the ongoing work of the Strategy.
 - > Launch of annual *State of the Industry Report*.
 - > Initiation of annual *Tourism Directions Conference* in collaboration with Tourism Australia.

More info: ret.gov.au/tourism/tmc/workinggrps/research

Tourism Access



Source: Bureau of Infrastructure, Transport and Regional Economics

Ensure optimal access to Australia

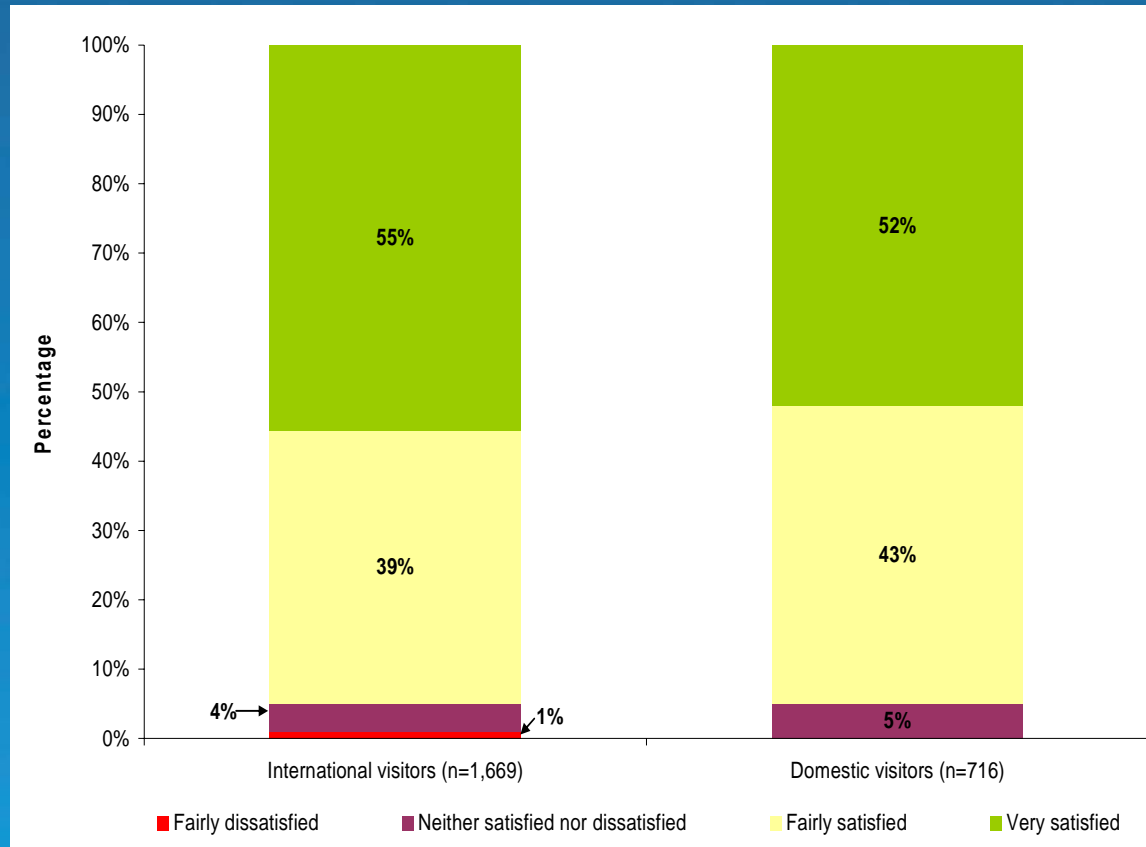
- Aviation priorities
- Regional airports
- Improve cruise industry

Tourism Access Working Group

- Role: to ensure there is optimal access for tourists to come to and travel through Australia.
- Key achievements:
 - > Mapping Tourism Access Priorities project underway to inform bilateral air service negotiations.
 - > Increasing awareness of the Tourist Refund Scheme.
 - > Increasing engagement with stakeholders on the Enhanced Regional Airports package.
 - > Improved cruise shipping data.
 - > Project being developed to understand the tourism and economic benefits of simplified border arrangements for Trans-Tasman travel.

More info: ret.gov.au/tourism/tmc/workinggrps/access

Tourism Quality



Source: Tourism Research Australia; International Visitor Survey; National Visitor Survey.

Improve Australia's satisfaction rating through nationally consistent benchmarks

- Ensure a quality tourism experience
- Develop a nation-wide quality accreditation framework.

Tourism Quality Council of Australia

- Role: to improve the quality of Australia's tourism product offering through developing and applying nationally consistent benchmarks.
- Key achievements:
 - > Implementation of the National Tourism Accreditation Framework (NTAF).
 - > Launch of the TQUAL brand to industry.

More info: ret.gov.au/tourism/tmc/workinggrps/tqca

Going Forward

- Development of Two-Year Forward Work Program, to continue the implementation of the Strategy and progress the work from the priority actions.
- Budget of A\$2.9 million for 2011-12 and 2012-13.
- Cross portfolio and industry engagement critical to success.

Stakeholder Communication

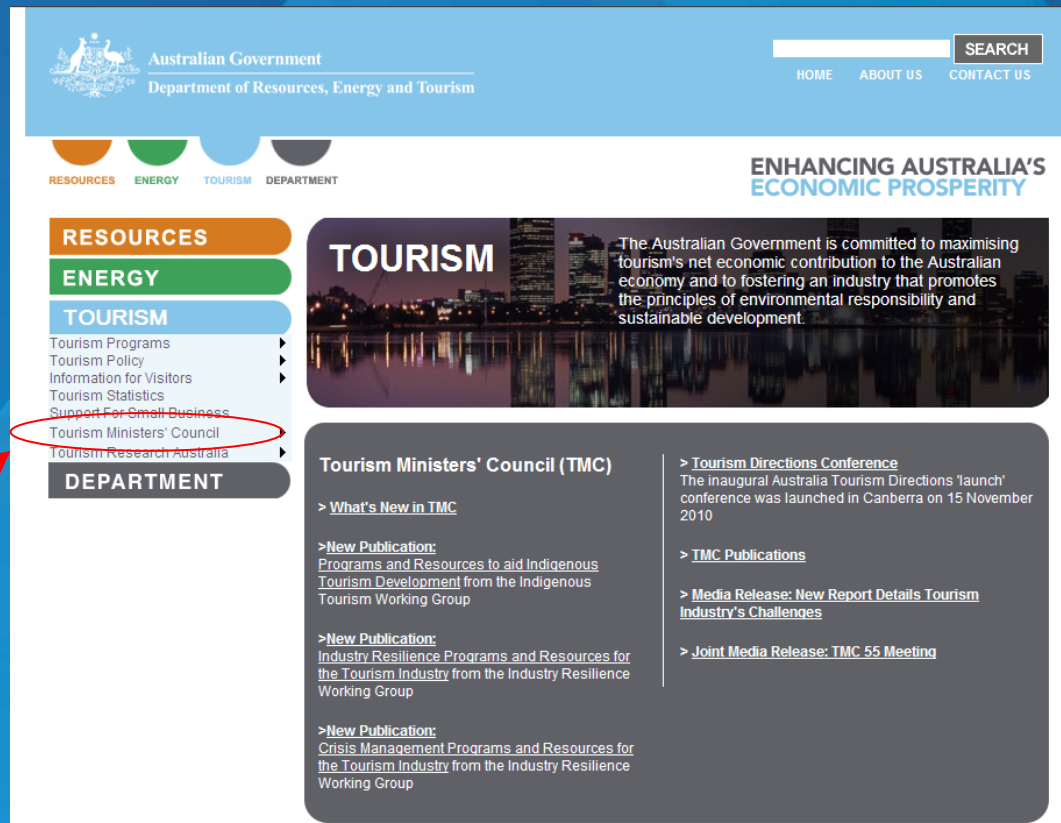
- Communication with stakeholders on progress of the Strategy through:
 - > TMC website (updated monthly).
 - > TMC meeting communiqués.
 - > Correspondence and presentations from Ministers to stakeholders as appropriate.
 - > Presence of TMC/ ASCOT/ Working Group members at key tourism industry events.
 - > Presence of industry at Working Group meetings.
 - > Regular publications in Tourism Australia's 'Essentials' industry newsletter
 - > Annual *Tourism Directions Conference*, with release of *State of the Industry Report*, at Parliament House Canberra.

Recommendations

- Consult, cooperate and communicate
 - > Seek to consult on issues at all levels of government and across jurisdictions, but most importantly with the tourism industry
 - > Cooperate on initiatives and actions, communicate outcomes
 - Tourism is not just about marketing and promotion
 - > Seek to identify the barriers and weaknesses which stymie development of the tourism industry
 - > Develop policies to remove or reduce those barriers e.g. regulatory and investment
 - Research is key
 - > Provides the evidence to underpin policy decisions which “sell” the importance of tourism to government decision makers
 - > Helps cement tourism’s rightful status as one of a nation’s key economic drivers
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National Long-Term Tourism Strategy

For more information on the Strategy visit
www.ret.gov.au/tourism



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Department of Resources, Energy and Tourism

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TOURISM
The Australian Government is committed to maximising tourism's net economic contribution to the Australian economy and to fostering an industry that promotes the principles of environmental responsibility and sustainable development.

Tourism Ministers' Council (TMC)
> What's New in TMC
> New Publication: Programs and Resources to aid Indigenous Tourism Development from the Indigenous Tourism Working Group
> New Publication: Industry Resilience Programs and Resources for the Tourism Industry from the Industry Resilience Working Group
> New Publication: Crisis Management Programs and Resources for the Tourism Industry from the Industry Resilience Working Group
> Tourism Directions Conference
The inaugural Australia Tourism Directions 'launch' conference was launched in Canberra on 15 November 2010
> TMC Publications
> Media Release: New Report Details Tourism Industry's Challenges
> Joint Media Release: TMC 55 Meeting



Australian Government

This is an initiative of Commonwealth, State and Territory Governments in partnership with Industry.

