ANALYSIS OF NATIONAL, STATE, REGIONAL AND LOCAL TOURISM STRATEGIES AND PLANS

Identification of strategic issues

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EXECUTIVE SUMMARY

Trends in consumer demographics and behaviour, technology and competition have changed the tourism environment requiring the industry to take a more strategic destination management approach to its planning to remain competitive (Nordin, 2003; Russell, 2000). In the future, the focus will be on refining these strategies and determining the best approach for each individual destination within a collective whole. In the past the Australian Government's key purpose for the tourism industry has been on 'jobs growth' (Tourism Australia, 2007, pg. 6). The future will see the Australian economy, and thus the tourism industry, affected by labour and skills shortages, climate change, an ageing population and further domestic and global economic fluctuations. This will make it necessary for the industry to change its previous strategies for competitive advantage and advocacy.

This scoping study provides an overview of a detailed analysis undertaken on 76 Australian national, state/territory, regional and local tourism strategies and plans. It was undertaken at the request of the Sustainable Tourism Cooperative Research Centre (STCRC). This study aimed to compile an extensive desk top audit and review in order to create a document database and to identify current issues concerning the Australian tourism industry. Many of the strategies that emerged were sourced from local or state/territory government bodies, a result of strong government involvement in the tourism industry at the regional and local level. Often these strategies were developed based on an industry consultation process and represent the viewpoint of a number of stakeholders. The methodology applied was secondary content analysis, which is a recognised qualitative technique often applied in tourism planning (Janesick, 2000; Dey, 1993; Glesne, 1999). The primary outcome of the study was to assist STCRC in its planning for future research and to secondarily inform the national Tourism Alliance's Australian Tourism Industry Strategy. The top 10 key issues that emerged from the study (ranked in order of the most referenced) were:

- product and market development (i.e. diversification and niche market development)
- leverage Australia's many strengths
- development through clustering (i.e. collaboration and networking)
- develop aviation
- fluctuating Australian and global economies
- plan, promote, attract and increase investment in tourism infrastructure
- raising the profile of the tourism industry with government and the community
- technology's impact on the distribution system
- maximise and grow yield and dispersal
- a Sustainable Tourism Destination Management approach to planning

However these issues could be grouped with other arguments on similar topics. The most discussed collective topic was 'Marketing and its current effectiveness'. The three key issues under this discussion topic were 'Poor marketing and segmentation', 'Brand marketing, development and integration' and 'Improve and increase marketing and promotion'.

Chapter 1

INTRODUCTION

Tourism in Australia grew rapidly last century, but increasing globalisation, competition and changing consumer behaviour has slowed growth. This has forced the tourism industry at a state/territory and regional level to take a more strategic destination management approach to its planning in order to remain competitive (Nordin, 2003; Russell, 2000). The *Queensland Tourism Strategy* (2008) defines destination management as 'a strategic approach that coordinates stakeholders in the planning, development, marketing and application of resource to grow tourism in a destination for the benefit of the tourism industry and the wider community' (pg. 13). The trend towards this type of planning is expected to continue in the future with the requirement being on refining the strategies and determining the best approach for each individual destination within a collective whole.

The fundamental key to economic development and growing industries is to improve people's standards of living within a country by allocating resources in the most appropriate way (Gillespie, 1999; Shah & Burke, 2006), and tourism has been used in the past as a tool for economic development and growing jobs. In the future, the tourism industry will be increasingly shaped by changes to demographics and population shifts. There will be a tighter labour market, which will make it necessary to change the industry's previous focus on growing jobs and its prior strategies for competitive advantage and industry promotion.

Detailed analysis of the 76 Australian national, state/territory, regional and local tourism strategic planning documents allowed the identification and ranking of key strategic issues and priorities. This report presents the outcomes of this research by outlining and discussing the issues and priorities that emerged for the Australian tourism industry.

This report has the following structure:

- **Background and Methodology**
- **Summary of the Key Issues**
- **Discussion of the Key issues**
- **Conclusion**

Chapter 2

BACKGROUND AND METHODOLOGY

This scoping study of national, state/territory, regional and local tourism strategies and plans was undertaken at the request of Sustainable Tourism Cooperative Research Centre (STCRC). The primary objective of this study was to compile an extensive desk top audit and review and analyse the content of Australian tourism strategic plans at the national, state/territory, regional and local level. This was in order to create a document database and to identify current issues concerning the Australian tourism industry. The primary outcome of the study was to directly inform the national Tourism Alliance's Australian Tourism Industry Strategy.

This study was limited by time. In order to obtain a good cross-section of relevant strategies, a sampling frame was devised based on all local government areas in Australia. This sample frame was constructed from visitor numbers derived from Tourism Research Australia's International and National Visitor Surveys. Visitor numbers were considered to be the most appropriate as this top-line tourism variable would have the most impact on planning issues. Furthermore, the relevant statistics were readily available and more reliable at the local level than other variables due to weighting issues.

The initial literature search obtained 262 documents that related to tourism strategies and planning. This search uncovered strategies dating from 1996 to documents that were current at the time of this report's submission. A number of documents were culled from the initial search. For example, those that dated prior to 2000 were excluded to ensure relevancy.

The vast majority of documents were available online. However, to increase and guarantee coverage across the sample frame, emails were sent to all state/territory tourism organisations and a selection of regional tourism organisations and local government associations requesting copies of missing plans. Several strategies were unable to be obtained as they were in development. For example, the Yarra Valley and the Murweh Shire were all in development stages. It was also difficult to obtain strategies directly from organisations as many failed to reply or were overly protective of their strategies and so refused to provide them to the public. Due to government involvement in the tourism industry, particularly at the local level, many of the strategies were sourced from local or state/territory government bodies. However, these were often developed through an industry consultation process and thus represent the viewpoint of a number of stakeholders.

The document analysis commenced with a total of 270 relevant documents obtained either from web searching or direct contact. Refer to the full technical report for a list of the strategies and planning documents that were able to be obtained over the course of the four weeks that this project was in field. Working from these 270 documents the researcher analysed all national (Table 1) and, due to time restrictions the most relevant state/territory documents (Table 2) and a smaller sample of the regional (Table 3) and local strategies (Table 4).

Full analysis occurred on 76 documents. These were selected based on the sampling frame and industry expert's indication of relevance. Content analysis was utilised, which is a recognised and commonly used method for analysing secondary data sources (Janesick, 2000). This qualitative technique allows for analysis results in the documents to be uncovered progressively through reading and annotation of the material which leads to the natural creation of categories and cumulates in identifying the key data for the study (Dey, 1993; Glesne, 1999). This method has been applied previously in the study of tourism planning. Those documents directly related to tourism strategic planning were coded based on all issues, while those relating to industry sectors such as sport and restaurants were coded based on references to tourism issues. The coded references that emerged from the study are presented in Appendix B in the full technical report. Detailed individual summaries of the national, state/territory, regional and local strategies are presented in Appendix C, D, E and F, respectively.

Approaching the analysis of the sixtieth document it was noticed that no new major issues or themes were emerging. The remainder of the two hundred and seventy documents was quickly scanned for any possible relevant issues that were not discovered in the core research documents. While there is a possibility that some minor issues were overlooked in this process, all major issues come across in these additional documents were already addressed within the initial analysis. This further supports the findings discussed in this report.

A limitation of this study is the potential bias towards larger and more highly planned tourism states/territories and regions, or towards states with numerous regions and local areas. This is due to these regions having more formalised government structures and websites and thus greater availability of planning documents. Another possible bias would be misinterpretation, miscoding and personal biases associated with the researcher. While the researcher has endeavoured to remain accurate and impartial while drawing out relevant issues, these biases would be inherent. A final limitation of this report is that the data was based on secondary documents that dated from 2000. This means that much of the data and strategic thinking contained in the documents are already dated and perhaps not inclusive of the most recent industry issues.

Under the assumption that this report will be utilised by tourism industry leaders and experts the researcher has not endeavoured to explain all industry related concepts.

Table 1 Strategic Documents Analysed at the National Level

Level	Organisation	Year	Document	Website or contact
National	Sport and Tourism Division	2000	Towards a national Sports Tourism Strategy	http://catalogue.ausport.gov.au/fulltext/2000/feddep/SportTourismStrategy.pdf
National	Australian Tourist Commission (ATC)	2001	Olympic Games Tourism Strategy	
National	Tourism Australia	2002	China Strategy and Actions	http://www.tourism.australia.com/content/Research/ China_study_101002.pdf
National	Australian Government	2003	Tourism Green Paper	http://www.ret.gov.au/Documents/TourismGreenPaper20031107160414.pdf
National	Australian Government	2003	Tourism White Paper	http://www.industry.gov.au
National	OCDE	2003	national Tourism Policy Review of Australia	http://www.ret.gov.au/General/Tourism-BMET/Pages/nationalTourismInvestmentStrategy.aspx
National	Tourism Events Australia	2004	Tourism Events Australia Discussion Paper	
National	Restaurant and Caterers Australia	2004	Complete Policy Document	http://www.restaurantcater.asn.au/rc/content.aspx?id=10
National	Tourism Australia	2005	national Road Tourism Strategy Fact Sheet	http://www.tourism.australia.com/content/Niche/NRTSFactSheet.pdf
National	Department of Industry, Tourism and Resources	2005	Restaurant and Catering Industry Action Agenda	http://www.ret.gov.au/General/Tourism-ILT/Pages/RestaurantandCateringIndustryActionAgenda.aspx
National	Tourism Australia	2006	The Experience Seeker–A Uniquely Australian Invitation: Strategy and Execution	http://www.tourism.australia.com/content/Destination%20Campaign/Strategy%20and%20Execution.pdf
National	Department of Industry, Tourism and Resources	2006	Revised Action Plan for the Development of the Australia-Pacific Cruise Industry	http://www.tourism.australia.com/content/aussie_experiences/2007/RevisedActionPlanForAustralianCruiseIndustry2006.pdf
National	Tourism Australia	2006	Action Plan for Japanese Tourism: Embracing change	http://www.ret.gov.au/Documents/FINAL_JAPAN_ACTION_PLAN2006_23030620060323122603.pdf
National	Department of Industry, Tourism and Resources	2007	Australian Government national Tourism Investment Strategy	http://www.ret.gov.au/Documents/AGResponse_jan20070110165941.pdf
National	Department of Resources, Energy and Tourism	2007	national Tourism Incident Response Plan	http://www.ret.gov.au/Documents/NTIRP20070321093000.pdf
National	Department of Resources, Energy and Tourism	2007	Tourism White Paper Annual Progress Report, 2006	http://www.ret.gov.au/Documents/TWP_Progress_Report_0620070420171843.pdf

Table 1 Strategic Documents Analysed at the National Level (cont.)

Level	Organisation	Year	Document	Website or contact
National	Winemakers Federation of Australia	2007	Wine Australia: Directions to 2025	http://www.ret.gov.au/Documents/TWP_Progress_Report_0620070420171843.pdf
National	Indigenous Tourism Australia	2007	national Strategy for Indigenous Tourism 2007–2012	http://www.indigenoustourism.australia.com/content/PDF/Indigenous%20Roadshow%20Rpt%20LR.pdf
National	Tourism Australia	2007	Planning for Inbound Success	http://www.tourism.australia.com/content/Marketing/planning_for_inbound_success/planning_for_inbound_success_2007.pdf
National	Restaurant and Caterers Australia and the Department of Industry Tourism and Resources	2007	The Business of Eating Out – Including Status updates Part 1, 2 and 3	http://www.ret.gov.au/Documents/
National	Tourism Australia	2008	Tourism Australia's Corporate Plan	http://www.tourism.australia.com/content/About%20Us/Corp_plan0708_0910.pdf
National	Tourism Research Australia	2008	Through the looking glass	http://www.tra.australia.com/content/documents/Domestic%20Stage%203/FINAL%20-%20Through%20the%20looking%20glass.pdf
National	Department of Resources, Energy and Tourism	2008	Industry Quality and Standards	
National	AusIndustry	2008	Business Ready Program for Indigenous Tourism & the Australian Tourism Development Program	http://www.ausindustry.gov.au/library/BRPIT_Feb08_final20080229023449.pdf; http://www.ausindustry.gov.au/library/ATDP_final_feb200820080229015736.pdf
National	Department of Resources, Energy and Tourism	2008	national Tourism Accreditation	

Table 2 Strategic Documents Analysed at the State Level

Level	Organisation	Year	Document	Website or contact
State	Tourism New South Wales	2002	Towards 2020: New South Wales Tourism Masterplan	http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib10/Masterplan%20-%20Full%20Version.pdf
State	Tourism New South Wales	2008	Tourism New South Wales Surf Tourism Strategy Summary	http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib14/GDayUSA_SurfTsmStrategy_FactSheet_FINAL.pdf
State	Tourism Victoria	2002	Victoria's Tourism Industry Strategic Plan Summary 2002–2006; & Victoria's Tourism Industry Strategic Plan 2002–2006	http://www.tourism.vic.gov.au/strategicplan/plan2002_2006/pdfs/summary_version.pdf http://www.tourism.vic.gov.au/strategicplan/plan2002_2006/pdfs/complete_plan.pdf
State	Tourism Victoria	2002	The Significance of Tourism Strategic Plan 2002-2006	http://www.tourism.vic.gov.au/strategicplan/plan2002_2006/pdfs/section2.pdf
State	Tourism Victoria	2003	Victoria's Tourism Industry Strategic Plan 2002–2006 Addendum 2003	http://tourism.vic.gov.au/strategicplan/plan2002_2006/addendum_oct_03.htm
State	Tourism Victoria	2004	Victoria's Tourism Industry Strategic Plan 2002–2006 Addendum 2004	http://tourism.vic.gov.au/strategicplan/plan2002_2006/addendum_oct_04.htm
State	Victoria Tourism Industry Council and Victoria Events Industry Council	2006	Tourism and Events Strategy 2016	http://www.vecci.org.au/resources/tourism+and+events+strategy+2016.pdf
State	Department of Innovation, Industry and regional Development	2006	Tourism and Events Industry Strategy	http://www.diird.vic.gov.au/corplivewr/_assets/main/lib60026/tourism-strat.pdf
State	Tourism Victoria	2007	Tourism Victoria Business Plan 2008–2011	http://www.tourism.vic.gov.au/images/stories/3yearplan.pdf
State	Tourism Queensland	2008	Queensland Tourism Industry Strategy	http://www.tq.com.au/tqcorp_06/index.cfm?E98B24EA-BF4E-9693-F458-46147C183D91
State	South Australian Tourism Commission	2002	South Australian Tourism Plan 2003–2008	www.tourism.sa.gov.au
State	South Australian Tourism Commission	2006	South Australia's Strategic Plan: Tourism Implementation Action Plan	www.tourism.sa.gov.au
State	Tourism Western Australia	2005	The State Report: Destination Development Strategy, 2004–2014	http://www.tourism.wa.gov.au/Publications%20Library/Polices%20Plans%20and%20Strategies/Destination%20Development%20Strategies/Statewide%20Destination%20Development%20Strategy%202004-2014.pdf
State	Tourism Western Australia	2007	Strategic Plan 2008 to 2013: building for the future	http://www.tourism.wa.gov.au/Publications%20Library/Executive%20Services/Strategic%20Plan_2008.pdf
State	Tourism Tasmania December, 2007	2007	Tourism 21: Strategic Business Plan 2007–2010	http://www.tourismtasmania.com.au/pdf/2007_tasind_t21dec.pdf
State	Northern Territory Tourist Commission	2003 2004	Northern Territory Tourism Strategic Plan 2003–2007 & Strategic Plan Update	Contact: Valerie Smith, email. Valerie.smith@nt.gov.au
State	Northern Territory Tourist Commission	2008	Five Year Tourism Strategy Plan: A plan to guide the direction and success of the Northern Territory Tourism Industry 2008 to 2012	Contact: Valerie Smith, email. Valerie.smith@nt.gov.au
State	Environment ACT	2000	Nature Based Tourism Strategy for the Australian Capital Territory	http://www.tams.act.gov.au/__data/assets/pdf_file/0015/13029/nbtstrategy.pdf
State	Australian Capital Tourism	2005	Seeds for Success	Contact: Justin Lalor, email. Justin.lalor@act.gov.au
State	Australian Capital Tourism	2005	Our Industry – Our Future	Contact: Justin Lalor, email. Justin.lalor@act.gov.au
State	ACT & Region Chamber of Commerce and Industry	2006	Canberra's tourism industry	http://www.ticact.org.au/documents/Lobby_Policy/Position%20Paper%20-%20September%202006.pdf

Table 3 Strategic Documents Analysed at the Regional Level

Level	Organisation	Year	Document	Website or contact
Regional	Tourism New South Wales	2002	South Coast: regional Tourism Plan 2003–2006	http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib13/South_Coast_regional_Tourism_Plan.pdf
Regional	Riverina regional Tourism	2003	regional Tourism Action Plan	Fiona Last, email. naturally@riverinatourism.com.au
Regional	Hunter regional Tourism Organisation	2005	The Hunter Region Strategic Tourism Plan 2005–2008	Not Applicable: sourced by the Sustainable Tourism Cooperative Research Centre
Regional	Tourism Victoria	2005	Mornington Peninsula: regional Tourism Development Plan 2004–2007	Paul Albone, email. paul.albone@tourism.vic.gov.au http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/mornington-peninsula-rtdp-2005-update.pdf
Regional	Geelong Otway Tourism	2007	Strategic Plan 2007-2010	http://www.geelongotway.org/uploads/395616632___2007-2010StrategicPlan.pdf
Regional	Tourism Queensland	2004	Sunshine Coast Destination Management Plan	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=63FFE5CD-D5BC-D9C0-D1B2-D3A528A8B0CD&siteName=tqcorp_06
Regional	Gold Coast Tourism Bureau	2006	Gold Coast Tourism: Five Year Plan	Steven Holle, email. steven.holle@gctourism.com
Regional	Tourism Queensland	2007	Destination Management Plan for Tourism in South East Queensland Country, 2007–2010	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=8D6D630B-C382-1795-6D6B-C88ED474684C&siteName=tqcorp_06
Regional	Tourism Tropical North Queensland	2007	2007–2008 Business Plan	Annie Riddet, email. Annie.riddet@tnq.org.au
Regional	Riverland Strategic Tourism Plan Steering Committee	2005	River Integrated Strategic Tourism Strategy	Not Applicable: sourced by the Sustainable Tourism Cooperative Research Centre
Regional	Alexandrina Council, District Council of Yankalilla, City of Onkaparinga, City of Victor Harbor and South Australian Tourism Commission	2007	Fleurieu Peninsula Region Integrated Strategic Tourism Plan 2007–2012	www.tourism.sa.gov.au
Regional	Tourism Barossa, South Australian Tourism Commission, Barossa Wine & Tourism Association	2007	Tourism Marketing Plan 2007–2008	http://www.barossa.com/webdata/resources/files/Tourism_Barossa_Marketing_Plan_07- 08.pdf
Regional	Tourism Western Australia	2007		
Regional	Augusta Margaret River Tourism Association	2008		
Regional	Northern Tasmania Development	2007		
Regional	Launceston City Council, Tourism Tasmania, Northern Tasmania Development and SCA Marketing and Red Inca	2005		
Regional	Australian Tourism Industry Association, Alice Springs Town Council, Chamber of Commerce Northern Territory, Department of Natural Resources, Environment and the Arts, Department of the Chief Minister, Tourism NT Prepared by National Centre for Studies in Travel and Tourism	2005		
Regional	Australian Tourism Industry Association, Alice Springs Town Council, Chamber of Commerce Northern Territory, Department of Natural Resources, Environment and the Arts, Department of the Chief Minister, Tourism NT	2007		

Table 4 Strategic Documents Analysed at the Local Level

Level	Organisation	Year	Document	Website or contact
Local	Manly Council	2006	Manly Sustainability Strategy: For Today and Future Generations	http://www.manly.nsw.gov.au/Sustainability-Strategy.html
Local	Orange City Council	2003	Orange City Cultural Plan	http://www.orange.nsw.gov.au/download.cfm?DownloadFile=3CF04011-E7F2-2F96-3F3463F6485B33B2
Local	Orange City Council	2006	Orange City Council Strategic Heritage Plan	http://www.heritage.nsw.gov.au/docs/incentives/hs_orange.pdf
Local	Country Victoria Tourism Council	2001	Planning for Tourism: Summary of Wangaratta Tourism Strategy	http://www.decipher.biz/PopupPages/packet_frame.aspx?packet_id=FN5cYLxuofw%3d&record_usage=BFwHmG4lRqg%3d&pathway_id=vlZe9Gyx0hU%3d&client_id=a2GSpnDbruI%3d&client_code=4o0GN%2fQ1BHkUXoXlKl1foQ%3d%3d
Local	Tourism Alliance Victoria	2005	Planning for Tourism Fact Sheet: Summary of Murrindindi Tourism Strategy	http://www.vtoa.asn.au/downloads/TAV%20Fact%20Sheets/Planning%20for%20Tourism%20Fact%20Sheet%20Final.pdf
Local	Tourism Alliance Victoria	2005	Functions of a local Tourism Association: Summary of Nillumbik Tourism Strategy	http://www.surfcoast.vic.gov.au/Tourism/Documents/LTA_Fact_Sheet.pdf
Local	Latrobe City Council	2006	Latrobe 2021: The vision for Latrobe Valley	http://www.latrobe.vic.gov.au/WebFiles/Council%20Documents/Council%20Plan/Latrobe%202021%20-
Local	Gold Coast City Council	2007	Gold Coast 2010: Economic Development Strategy – Action Plan	http://businessgc.com.au/uploads/eds_2007_actionplan.pdf
Local	City of Port Adelaide Enfield	2006	Integrated Strategic Tourism Plan	http://www.portenf.sa.gov.au/webdata/resources/files/Integrated_Strategic_Tourism_Plan_2006-2010.pdf
Local	City of Albany Council	2005	City of Albany Tourism Strategy	http://svc010.wic466d.server-web.com/images/albany/CityofAlbanyTourismStrategy.pdf
Local	Central Coast Council	2004	Central Coast Economic Development Plan 2004–2009	http://www.centralcoast.tas.gov.au/webdata/resources/files/EconomicDevelopmentPlan20042009.pdf
Local	Mataranka Community Government Council	2004 2007	Business Plan 2004–2005 Business Plan 2007–2010	http://www.mataranka.nt.gov.au/home/about_us/business_plans

Chapter 3

SUMMARY OF KEY ISSUES

From the analysis of the strategic planning documents, several insights into the planning strategies of the different levels of government emerged. At the national level, the focus was more heavily upon marketing rather than strategic planning. Other sorts of strategic planning, such as tourism business development, seemed to come from multiple organisations such as AusIndustry, Tourism Australia and the Department of Resources, Energy and Tourism. At the state/territory level some organisations appeared to be more advanced with their planning compared to other states/territories. At the regional level, there were a substantial number of documents, however, at the local level documents became sparse or less easy to obtain. Generally across all the levels the availability of strategic documents was correlated with visitor numbers, size of the government and reliance on the tourism industry. For example, Victoria had a substantial number of tourism plans and strategies across all tiers of government.

National documents, as would be expected, discussed ‘big issues’ that were affecting the industry, while regional and local plans tended to be more focused on micro details, such as signage and hours of business operation. The regional and local strategies made a number of comments regarding the need for funding and support for tourism development, while this was less of an issue at the national and state/territory levels. Some of the smaller or more rural local governments were still attempting to establish visitor information centres. Regional tourism organisations business plans, when they were available, were often solely focused on marketing and market growth performance indicators and ignored business planning and development issues. This sort of planning, if it was addressed at all, was instead generally left to the local government authority with the strategies being incorporated into wider local government economic development plans. Other regional and local tourism organisations did not yet have a strategic plan, for example the Outback South Australia, the Yarra Valley in Victoria and the Murweh Shire in Queensland (all three indicated that they were in development).

Most state/territory tourism organisations had regional tourism strategies; however they were again heavily focused on marketing. Some larger local governments had their own tourism strategies which did not necessarily align with the state/territory’s tourism strategy. Others, however, were well integrated and referenced to their STOs. An inconsistent message from government to industry on planning and development matters would be confusing operators and investors and slowing growth. There is a need to determine appropriate and satisfactory roles and responsibilities.

The ten main issues identified from the analysis of the tourism strategic plans were:

- product and market development (i.e. diversification and niche market development)
- leverage Australia’s many strengths
- development through clustering (i.e. collaboration and networking)
- develop aviation
- fluctuating Australian and global economies
- plan, promote, attract and increase investment in tourism infrastructure
- raising the profile of the tourism industry with government and the community
- technology’s impact on the distribution system
- maximise and grow yield and dispersal
- a Sustainable Tourism Destination Management approach to planning

However, these issues could be grouped with other arguments on similar topics. The most discussed collective topic was ‘marketing and its current effectiveness’. The three key issues under this discussion topic were ‘poor marketing’, ‘improve and increase marketing’ and ‘brand marketing and development’.

The key collective topics that emerged in order of most referenced were:

- marketing and its current effectiveness
- distance and access
- destination management
- the labour market
- infrastructure and investment
- industry structure
- product and market development
- demand, awareness and appeal
- politics
- research
- price, yield and dispersal
- product strengths
- the environment
- adverse externalities and risk management
- the economy
- technology’s impact on tourism
- service and product quality
- major and business events
- changing consumer behaviour
- increasing competition
- Indigenous tourism

Chapter 4

DISCUSSION OF THE KEY ISSUES

This section will present a brief discussion of the key issues and highlight their importance and possible effects on the tourism industry in the future. For logical progress of this section, reporting will discuss topics in the following format:

- changing consumer behaviour
- increasing competition
- demand, awareness and appeal
- product and market development
- marketing and its current effectiveness
- product strengths
- distance and access
- price, yield and dispersal
- service and product quality
- infrastructure and investment
- major and business events
- indigenous tourism
- the economy
- politics
- the labour market
- the environment
- destination management
- industry structure
- research
- adverse externalities and risk management
- technology's impact on tourism

Changing Consumer Behaviour

Of major concern, particularly at the national and state/territory levels were changes to consumer behaviour, demographics and holiday patterns that were being influenced by:

- an ageing population
- the retirement of baby boomers
- attitudes to careers and work/life balance
- changes to annual leave patterns
- increased housing and credit card debt
- increased stress
- shorter breaks
- increased outbound travel
- affects of terrorism and SARS
- significant population shifts
- changes to family structures
- fluctuations in demand for outputs from key Australian industries
- globalisation
- new emerging travel markets
- competition
- poor tourism marketing

Increasing Competition

There are a number of references made to increasing competition. The competitive forces affecting the tourism industry are cited as being sourced from:

- tourism industry businesses
- overseas tourism destinations
- destinations in Australia (across state/territory, regional and local levels)
- tangible goods
- changing trends in the labour market (i.e. reduced leisure time and lack of workers)

Demand, Awareness and Appeal

Declining or flat growth in visitation from key markets, such as the Japanese market and domestic market, was of considerable concern due to a perceived reliance on these markets. A number of strategies were concerned over low market awareness or poor images of regional or niche products, resulting in poor visitation and yield. It was suggested that current market awareness of the product was not being translated into interest or intention. Proposed strategies for increasing awareness and appeal were value adding to current strengths and educating emerging niche markets (such as China and India) on the Australian product. Suggested changes to demand in the future included increases in experiential tourism, active holidays, 'learning' holidays, eco-tourism, adventure tourism and customised or unique experiences.

Some strategies identified that the key problem was that many regions had diversified and were using this as their key marketing strategy. However such strategies were being more frequently criticised in the more recent planning documents. As the Riverina regional Tourism Incorporated's (2003) *Regional Tourism Action Plan (2003–2006)* states:

> *Most leisure travel to the Region would appear not to combine the diverse elements the Region offers ... (pg. 10)*

Later it goes on to note that:

> *Because of its diversity, the Region has struggled to find a clear point of differentiation in the tourism market. Among the weaknesses identified for the Region was the fact that the Riverina was seen to be poorly defined. Its diversity has, in the view of the Group, hindered the Region in achieving a clear position in the market place. That is, there is no discernable value in trying to say we have it all. (pg. 43, emphasis in original).*

Product and Market Development

There appears to be considerable differences in the strategies over how product development should occur. While some strategies propose a need for niche market development and product base diversification, others suggest that due to market fragmentation and weak branding there is a need to focus on strengths and develop 'core products '. For example, Tourism Victoria's (2002) V*ictoria's Tourism Industry Strategic Plan 2002–2006* places emphasis on the fact that food and wine is a 'core product strength' and identifies the Yarra Valley as its key food and wine destination for marketing both domestically and internationally. However, many of the strategies identify similar products as their strengths and areas for development. For example, continuing on discussing the food and wine tourism arena, both South Australia and the Gold Coast also note the food and wine product in their strategic growth plans. One strategy raised concern of a possible oversupply of wineries and cellar door experiences. Such an oversupply would be causing businesses to be less profitable, reducing their viability. Numerous strategies noted the need for product and market development through diversification into niche markets. The emphasis was on diversifying the product base and targeting markets so that the destination is better able to cope with risk and seasonality.

The key products highlighted for growth tend to be:

- major and business events
- nature based- and eco-tourism
- Indigenous tourism
- the Chinese and Indian emerging markets
- the drive market
- education tourism
- food and wine
- arts, music and craft
- wildlife viewing
- family holidays
- heritage, mining and gold rush
- the Outback

Sometimes it may be better for destinations to take a comparative advantage approach and compete on different product strengths, rather than attempting direct competition on homogenous products. For a simple example, instead of two regions directly competing in wine tourism, the more recognised wine region could be developed as ‘the’ wine region and the second, although still having strengths in wine, could be marketed as ‘the’ food region. Such an approach would require coordination at the national level to retain diversity of product within the Australian destination and to aid compromise. This strategy would reduce direct competition between destinations and increase demand (particularly domestic) for certain regions as they would be supplying highly unique and iconic products that are not widely available elsewhere.

Marketing and its Current Effectiveness

There were also considerable differences amongst the strategies regarding marketing and its current effectiveness. A majority of the strategies stated that current marketing was not achieving the desired results. Marketing efforts were generally considered to be effective in those strategic planning documents prepared by the same organisations that were responsible for undertaking the development and roll out of the marketing campaign. The strategies (across all levels) that indicated current marketing was not effective reasoned that it:

- is unadaptive
- is not benefiting all stakeholders equitably
- is missing the mark
- is fragmented and multi-layered (due to diversity of product)
- is resource intensive (due to diversity of product)
- is poorly branded (weak association and poor image)
- has a marketing, demand and supply mismatch
- has gaps between customer expectation and satisfaction.

In reference to the national tourism marketing campaign, Victoria’s Department of Innovation, Industry and Regional Development’s (2006) *Tourism and Events Industry Strategy* questioned:

> *Can campaigns that ask ‘So where the bloody hell are you’ attract sophisticated travellers to Victoria’s boutique wineries and Melbourne’s fashionable shopping and food precincts? (pg. 16)*

More generally, the above statement is supported by Tourism Tasmania’s (2007) *Tourism 21: Strategic Business Plan 2007–2010:*

> *Recent research has found that domestic travel is of diminishing interest to Australians and most travel marketing misses the mark, focusing on the destination, not the personal desires of the traveller. (pg. 9)*

Tourism Tropical North Queensland (2006) notes in its *2007–2008 Business Plan* that a negative factor of current marketing is the inconsistency of Brand Australia and weak national tourism marketing campaigns (pg. 8).

There was evidence of such an argument also being applicable at the state/territory level in some regional and local documents. The marketing, demand and supply mismatch which is leading to gaps in customer expectations, experiences and satisfaction was considered a serious problem. Ironically, for an industry based on marketing principles, is the strong suggestion existing that the tourism product must be developed to match ‘strong marketing campaigns'. There is a basic need to ensure that the product is in place prior to the marketing and attraction of the visitor in order to save on customer disappointment and bad word of mouth.

The strategies strongly called for improvements and increases to marketing. At the regional and local levels there continues to remain a focus on brand development and marketing. In fact, some regions have become so focused on branding their tourism industry that they are now calling their strategy a 'Whole of City' brand that is applied to all economic development in order to attract investment in other areas. However, the more recent national and state/territory strategies are referencing the need for cooperative marketing in order to increase marketing resources and impact and that these campaigns should cut across state/territory borders with a focus on the experience, rather than the destination. Given the focus on regional dispersal, such a strategy does have an inherent logic. Many of the smaller regional and local organisations portend a lack of destination awareness and resources for marketing.

Tourism Australia's marketing campaign is based on the 'Experience Seeker'. However, while marketing to this visitor has already been occurring, there is still a need to properly identify this consumer with Tourism Australia's (2008) *Corporate Plan 2007–08 to 2009–10* identifying a need to undertake:

> *Further research into Tourism Australia's target market—the Experience Seeker—[to provide] insights into consumer behaviour, attitudes and emotional triggers, socio-demographics, etc. (pg. 14).*

Given the focus on niche markets in most of the strategies, there is frequent reference to 'Target Marketing' across the documents. Several documents were taking this marketing strategy, although they tended to be older documents—see for example Northern Territory Tourist Commission's (2003) *Northern Territory Tourism Strategic Plan, 2003–2007*. The benefits of this claim that mixed target marketing allows for efficient and effective use of resources and increasing resilience to economic, global and seasonal trends.

Product Strengths

Continuing on with the earlier discussion of the debate between diversification and focusing on strengths, Australia's core strength is considered to be its diversity of product. The analysed strategies have focused on their strengths and potential opportunities for growth. Some of Australia's strengths that were identified included:

- food and wine
- events and festivals
- arts, music and craft
- wildlife viewing
- diverse natural attractions
- touring
- beaches
- alpine and ski
- range of accommodation
- competitive packaging
- good infrastructure
- shopping
- adventure
- Indigenous
- golf
- spa and well-being
- education
- entertainment

However a weakness identified in the strategies is that not all regions have, nor can they create, all (or sometimes even any) of Australia's strengths. Thus there is a need to take a destination management approach to developing individual regions with a focus on its own inherent core strengths. These strategies should link to a national level strategy for destination management that allows for competitive and comparative advantages. Currently there is a void of this type of management.

Distance and Access

One major weakness of Australia is the tyranny of distance. This is a key weakness for the domestic market, with many domestic travellers comparing some destinations in Australia relative to an overseas trip. The growth of tourism is traditionally linked to good locations, population growth and well developed access (Butler, 1980; Gunn, 1979). Indeed, a key strength identified by Tourism Victoria (2002) in its *Victoria's Tourism Industry Strategic Plan* was the state's compactness. Developing affordable access to Australia's destinations is critical if they are to be successful.

A method that has been developed to deal with this issue is the 'Drive', 'Fly/Drive' or 'Touring' market. The disadvantage of distance can itself be a strength, with many international travellers and caravanners perceiving distance as an 'authentic' experience. In addition, with increases in aviation, remote and long haul destinations will become increasingly more affordable and accessible with capital cities acting as gateways to regional areas, Tourism Western Australia (2007), *Australia's Gold Outback: Destination Development Strategy 2007–2017*.

An issue associated with distance and access is road quality and signage. This is highlighted as a key area for product development, particularly in regional areas. Current signage is considered to be of poor quality and consistency. The strategies promote the need for uniform tourism directional and interpretative signage that links to a brand. Care must be taken in their development to ensure they have minimal negative impacts on the destination, such as a high rate of foreign language signs. In some strategies there is discussion of a need for a tourism signage policy or guidelines that outline standards, maintenance and development. Proposals also include the integration of signage with maps and brochures and investigating new GPS navigational technologies for development of tourism products.

In terms of developing public transportation, the focus was on air access and the need to increase and attract additional seating capacity, direct and more frequent flights, route development and regional services. In this regard, the key reasoning behind South Australian Tourism Commission's (2006) aviation strategy, as outlined in their *South Australia's Strategic Plan: Tourism Implementation Action Plan,* can be summarised as:

> *Air access is critical to tourism. If the growing international market to Australia is motivated to visit SA, but can't get here, then marketing effort is inefficient. In addition, airlines are powerful marketing partners that can contribute to brand strength. Assist existing direct Adelaide services to achieve average annual load factors in excess of 80% to ensure sustainability (through cooperative marketing) (pg. 4).*

A number of strategies called for further liberalisation of the Australian aviation sector in order to reduce development issues and delays. Other discussions of transport noted a need to develop the cruise line industry (particularly the Tasmania and the Northern Territory state/territory strategies). At the regional and local level there was a need to develop additional inter and intra regional public transport (i.e. buses and rail) and to increase their scheduling and affordability.

Price, Yield and Dispersal

The Australian Government's (2003) *Tourism Green Paper* and *Tourism White Paper* state a need to focus on high yield visitors in order to enhance business profitability and dispersal and develop regional economies. These strategies were repeated in numerous documents across all destination levels.

Some documents note a need to increase and improve packaging of different tourism and associated products, particularly in regional areas and for emerging markets. There is emphasis on the development of regional products and experiences to attract the visitor, with a number of more recent documents noting a lack of affordable accommodation and transport, particularly in regional areas.

The price of aviation was discussed in terms of cheaper flights that have become available between the major capital cities and for outbound travel with the introduction of the low cost carriers and the substantial increases in price competition particularly with Asia and other Australian destinations.

It was generally concluded that Australia is considered an expensive destination and that consumers were becoming increasingly price sensitive. To deal with this issue there were several strategies that included suggestions for the development of an industry pricing strategy. With increasing pressure from fuel prices and inflation, Australia would struggle to position itself as a low cost destination, particularly when up against the low cost tourism destinations emerging in Asia.

Many regions are attempting to target the 'high yield' international visitor in order to position themselves, and Australia, as a quality destination to compete on a different level against Asia. This, however, is increasing competition between Australian regions. For example, the previously strongly positioned quality region of Launceston is now struggling to maintain competitiveness against typically low cost Australian regions that are not focusing on yield.

As Launceston City Council, Tourism Tasmania, Northern Tasmania Development and SCA Marketing and Red Inca (2005) *Launceston Tourism Plan 2005–2010* notes:

> *In order to lift the standards of existing product and services to a level that will stave off regional competition, increased expenditure by private operators is required. In the short term, this will erode margins. If, however, industry does not differentiate on quality then they will be forced to compete on price and in doing so, erode margins even further (pg. 9).*

To remain competitive, the tourism industry must focus on high yield which means it needs to invest in and upgrade its product. The industry is still struggling with this strategy.

Service and Product Quality

On the subject of service and quality, Riverland Strategic Tourism Plan Steering Committee's (2005) *Riverland Integrated Strategic Tourism Strategy* eloquently quotes John Bell (CEO of Esprit):

> *It has been said that in business today, service is not an issue—if you don't provide service you are out of business. Quality is not an issue—it's something you have to have (pg. 27).*

Australia is promoted as a quality destination, but it is currently struggling with varying service levels and a need to upgrade and develop its product offering. Tourism Australia acknowledges that 'there has been an overall decline in the product and service quality standards across the board ...' (Tourism Research Australia, 2008, pg. 9). The report goes on to remark that 'there is a lack-lustre feel for many of Australia's domestic offerings and a general lack of renewal that needs to be somehow addressed' (Tourism Research Australia, 2008, pg. 9). Given that the strategy section of Tourism Australia appears to be at a loss as to how remedy the situation it clearly shows a lack of strategic planning in this area.

If Australia is to continue to focus on yield, the destination must deliver to higher customer expectations of product and service. Other strategic plans that were analysed proposed the following tactics:

- foster business excellence
- increase training and education
- develop accreditation systems
- encourage the uptake and enforce compliance of accreditation
- educate the community about tourism (to ensure visitor acceptance)
- standardise elements of destinations (such as operating hours and signage)
- reduce crowding
- ongoing maintenance to ensure quality of destinations
- increase barriers to entry
- develop innovative solutions (i.e. increase productivity)

It was observed across the strategies that the unstructured or non-accredited areas of the industry tended to be in regional areas, niche products, emerging products or those destinations with a high proportion of SMEs.

Infrastructure and Investment

There was strong awareness of the need to increase, promote, attract and manage investment in tourism infrastructure in order to grow the industry. This included both new developments and the upgrading of ageing infrastructure. As Tourism Victoria's (2002) *Victoria's Tourism Industry Strategic Plan 2002–2006* surmises:

> *Marketing alone will not sustain visitor growth. There is a need to focus on staying one step ahead of the market by delivering supply led infrastructure initiatives that induce and feed market growth, creating an economically sustainable industry (pg. 113).*

Some areas for development included:

- mid-range accommodation (particularly eco-accommodation)
- cruise ship facilities
- sporting infrastructure
- wildlife interpretative centres

In general, the strategies concluded that Australia has a well developed and diverse range of tourism and support infrastructure. In the past, the growth in this infrastructure has been the result of strong entrepreneurial investment (Russell, 2000). The strategies identified a current insufficient level of private sector investment in the tourism industry. Some major factors that have limited tourism investment are identified by the Australian Government's (2003) *Tourism White Paper:*

> *… a history of low rates of return … lack of basic information to help potential investors … the inherent cyclical and/or seasonal nature of tourism … the complexities of dealing with multilevel government project approval processes … (pg. 38).*

Department of Industry, Tourism and Resource's (2007) *National Tourism Investment Strategy: Investing for our future* also identified the following as areas for attention:

> *… regulatory barriers and taxation issues … continued liberalisation of air services arrangement … pursuit of efficient asset utilization … regional issues … improvements in education and training for tourism workers … [and the need for] clarity of vision and good leadership (pg. 2).*

There is a need to create a positive investment climate to attract private investors. Suggestions for facilitating such a climate included:

- investor partnerships
- state of the industry investment reports (to inform investors of opportunities)
- promoting destinations to investors
- decreasing planning regulations

In some well positioned destinations, population growth will continue to support growth in infrastructure. These regions will instead struggle with crowding and maintenance. Regional areas, on the other hand, will continue to struggle with infrastructure gaps, which the strategies identified as being a lack of basic facilities and amenities such as:

- accommodation
- airports, roads and signage
- lookouts and walkways
- toilets
- visitor information centres
- disabled facilities (including those that can support an ageing tourist population)
- conference and meeting facilities
- street lighting

There is a need to ensure the development of tourism infrastructure is approached in a sustainable manner by selecting investment projects that are appropriate, viable and environmentally sensitive (i.e. 'green' investment).

Major and Business Events

The strategies highlight a need to further develop, attract and retain major and business events in order to use them as a method for regional economic development, risk management and stability (i.e. in seasonality). The significance placed on major and business events for economic growth is highlighted in the Australian Government's (2003) *Tourism White Paper*:

> *Governments invest in staging events because they recognise they make both direct and indirect contributions to the economy. They attract visitors with a particular interest who are more likely to travel during difficult times and are less price sensitive (pg. 14).*

And this conclusion is further supported by the Victorian Government's (2006) *Tourism and Events Industry Strategy*:

> *An innovative and growing tourism and events industry is now a hallmark of a modern and sophisticated economy (pg. 6).*

At the regional and local level there were indications that there is a lack of major events and that those in place are declining. The strategies suggested the development of small regional events into iconic events that link in with, and build brand awareness for the destination. The strategies discussed the need for a nationally coordinated Events Strategy and Annual Events Calendar that would reduce destination clashes, seasonality and pre and post touring. Seasonality was identified as a major weakness in tourism and the distribution of events across the whole year was mainly aimed at overcoming this flaw. Leveraging the events for marketing purposes was another key goal behind the development of events with cited case examples being the Olympic and Commonwealth Games.

Indigenous Tourism

A key market identified for growth and development was the Indigenous tourism market. Australia's Indigenous culture and heritage is a strength and there is potential to develop this into a core tourism product. Several strategies noted that this product has been found to have significant consumer demand and potential to help under-privileged areas of the Australian population (see for example the Australian Government's 2003 *Tourism White Paper* and Indigenous Tourism Australia's (2007) *National Strategy for Indigenous Tourism*). The strategies indicated a need to:

- develop Indigenous tourism businesses
- engage Indigenous people
- develop collective marketing capacity
- increase employment and stability for Indigenous people
- address Indigenous land access, tenure and management issues
- organise, package and develop access to the product.

The Economy

The fluctuation currently occurring in the global and Australian economies was noted as a key issue in the strategies due to the affects these are having on consumer confidence, discretionary spending and tourism. Key drivers of economic instability impacting either directly or indirectly on the Australian tourism industry were identified as:

- fluctuating exchange rates
- increasing inflation
- increasing oil and fuel prices
- economic growth of developing Asian countries
- increasing levels of household debt (housing and credit cards)
- the mining boom
- more substitutes for tourism (increased competition)

Tourism businesses were generally identified as having low profitability and poor access to capital. Increasingly they are struggling with rising costs in labour, input products, insurance and compliance. A number of documents noted that traditional financial institutions are not appropriately geared for dealing with tourism businesses and investment which is typically seen as risky. The strategies noted a need to improve business productivity, reduce their costs and increase their viability.

Many governments have embraced tourism as a tool for economic development, particularly for regional and Indigenous communities. With some traditional industries such as agriculture continuing to decline, the trend towards service and knowledge based industries will continue in order to diversify economies. However this diversification trend is also being applied against tourism. For example, both the Gold Coast City Council's (2007) *Gold Coast 2010: Economic Development Strategy—Action Plan* and Manly Council's (2006) *Manly Sustainability Strategy: For Today and Future Generations* note an over reliance on service based industries, and tourism in particular, citing a need for diversification into other industries mainly due to weak tourism performance, investment and susceptibility to systematic risk.

Politics

Promoting the value and importance of tourism in the political arena, and increasing community awareness of the industry was stressed as a key issue discussed in many of the strategies. Due to a lack of awareness and support for the industry it was noted that there is a need to:

- raise the profile of tourism organisations
- strengthen the industry's collective voice
- inform and educate the community about the benefits of tourism
- increase community engagement
- educate local government on the importance of tourism
- increase the industry's profitability, viability and stability
- improve the standards of jobs in the industry

While many of the strategies call for a 'whole of government' approach to tourism management, they also note a lack of role clarity, coordination and policy alignment. To deal with these issues, several strategies advocate the creation of either a 'Tourism Strategy and Policy Division', a 'Tourism Branch' or simply a 'Tourism Officer' who is responsible for the tourism industry's strategic direction, decision making, coordination and advocacy.

Other key issues discussed in the strategies relating to tourism policy included:

- regional economic agreements and 'Approved Destination Status'
- the Commonwealth Governments 10 year Tourism Strategy, the Uhrig review and the perception that the Government has not kept its White Paper promises
- the need to decrease and simplify tourism taxation and regulations
- tourism strengths in tourism planning, strategic thinking and local government support and involvement.

The Labour Market

Labour is vital to the tourism industry. The Australian Federal Government's (2003) *Tourism White Paper* states:

> *Tourism is a people oriented sector and friendly, efficient, professional service is a major ingredient in establishing a Platinum Plus destination. Development of a skilled workforce, capable of sustaining high levels of service is critical to this labour intensive industry (pg. 25).*

The focus on jobs follows through into Tourism Australia's corporate plan but takes a slightly different context. The corporate plan states that its key purpose is to grow jobs by successfully marketing tourism.

The strategies allude to an approaching or existing labour shortage. This is particularly noted in several of the more recent strategies developed at the state/territory level (see for example, Australian Capital Tourism's (2005) *Our Industry—Our Future* and Tourism Queensland's (2008) *Queensland Tourism Industry Strategy*). The Victorian Governments Department of Innovation, Industry and Regional Development's (2006) *Tourism and Events Industry Strategy* cites a study undertaken by the Tourism Transport Forum:

> *A recent national survey of member businesses of the Tourism and Transport Forum indicated that 75% of businesses are seriously affected by labour shortages and are having difficulty filling positions. Skilled labour is crucial to the delivery of quality tourism experiences, especially as demands for service quality increase (pg. 26).*

Tourism labour shortages have been noted to be particularly prevalent in tourism in regional areas. To cope with this, several strategies called for the importation of tourism labour through the Working Holiday Maker scheme. Interestingly, Tourism Queensland's *Destination Management Plan for Tourism in South East Queensland Country, 2007–2010* notes that while some regional areas are struggling to find skilled tourism labour, 'the catchment of well trained hospitality staff in Brisbane is currently not being accessed' (pg. 41).

Australia's tourism labour force is generally highly skilled, an outcome of a well developed education system. However, some strategies refer to the possibility that the generally highly skilled tourism labour force has hidden skilled labour gaps, such as a lack of chefs. A number of the strategies argue for the need to increase training and skill levels in the tourism labour force through education, training and accreditation that targets industry needs. For example, Tourism Queensland's (2008) *Queensland Tourism Industry Strategy* recognises that 'tourism businesses require a workforce with skills and capabilities, attitudes and educational qualifications matching market needs' (pg. 38). The strategies suggested a need for the identification of tourism labour shortages and skills and training gaps at the local level.

One way to develop business productivity is through developing the industry's human resource practices to increase labour attraction and retention (Baum & Szivas, 2008). Many of the strategies draw this conclusion stating that there is a need to:

- promote tourism career pathways and opportunities
- encourage lifelong learning
- develop accreditation and excellence awards (particularly for volunteers)
- improve working conditions and wages
- provide and encourage staff to take annual leave
- ensure tourism jobs are more stable (i.e. regular hours/reduce seasonality).

The tourism labour market was described as high quality, flexible, transient and increasingly multicultural. A key area highlighted for development over the next decade was language and cultural skills, particularly to cope with the expected increase in Asian visitors (see Tourism Queensland's (2008) *Queensland Tourism Industry Strategy*). A multicultural tourism labour force is an issue that the tourism industry must be mindful of when undertaking marketing, i.e. 'don't build brands based on particular cultures or people' (Baum, 2007a, 2007b).

The Environment

It was acknowledged that Australia has a diverse array of natural attractions, many of which are World Heritage listed. These attractions need to be appropriately managed in order to retain them as a tourism assets. This means ensuring appropriate tourism development and increasing tourist and industry awareness of the need to protect Australia's environment.

An issue that will impact on the environment in the future, and thus inadvertently on tourism, is climate change and global warming. Due to the significant impact that carbon gas emissions from aviation have on the environment and the degradation that often follows mass tourism, the industry is currently seen in a somewhat negative light and this is leading to some pressure to reduce travel, particularly air travel. As Tourism Tasmania's (2007) *Tourism 21: Strategic Business Plan 2007–2010* notes:

> *Tourism experts agree with the United Nations World Tourism Organization that reducing travel is a simplistic response to climate change and fails to acknowledge the many benefits of tourism, both locally and globally (pg. 9).*

Broad concerns over environmental sustainability and social awareness are increasing. There is a strong opportunity to use this interest to help protect the environment and use this as a means to increase the tourism industry's profile. This may be achieved through 'carbon' credits on airfares and developing best practice environmental business and infrastructure models.

Destination Management

Sustainable tourism economic development, management and business practices were the focus of many of the strategies, with calls for sustainable development guidelines to assist destinations, investors and operators. Some strategies discussed Green Globe 21 accreditation in this context. A management issue that was frequently discussed at the regional and local destination level was the need for the further development and maximisation of Visitor Information Centres (VIC). Suggestions for improvement included:

- VIC Management strategies
- standardised hours of operation
- establish VIC Management Committees
- ensure VICs are established in regional destinations
- use VICs to promote tours
- upgrade facilities
- develop standardised VIC customer recording systems

Additionally, many strategies discussed the need for increased government funding for marketing, research and development. For example, Riverina Regional Tourism Incorporated’s (2003) *Regional Tourism Action Plan (2003–2006)* remarks:

> *... the Region’s tourism organisation (Riverina Regional Tourism Inc. (RRT)) is financially hamstrung in its ability to devise and implement strategies for the sustainable growth of tourism (pg. 1).*

Government funded agencies will always be constrained by budgets and the need to justify expenditure. This means they require strong research to support their decision making.

Industry Structure

A major weakness of the tourism industry is its fragmentation. The strategies indicate a lack of industry lead strategic management due to poor coordination and cohesion; a direct result of the magnitude of Small- and Medium-Sized Enterprises (SMEs) within the industry’s structure. There is some deliberation within the analysed strategies over who should provide leadership for the tourism industry. The general consensus is that the industry needs both government and industry leadership for growth. Currently the strategies portray an industry only being led by government. This directly relates back to the previous discussion on poor advocacy in the political arena where it was noted that the lack of a strong tourism industry voice in policy is resulting in a lack of support for the industry. There are more recent indications that the industry, as a whole, is becoming more coordinated with areas that had previously been lacking industry leadership now having new associations, such as Victoria’s Tourism Industry Council.

Many strategies for growth were focused on industry collaboration, coordination and cooperation. By strengthening the tourism industry’s networks regions were attempting to develop ‘clusters’ or ‘hubs’ of linked products and events which could be linked with a single brand. However, to do this effectively there is a need to increase networking both within the industry (within and across regions and tourism bodies), across government and with other industries such as sport, wine, national parks and arts, although a number of strategies do go on to note that other regions and industries are considered competitors. It is necessary to assess potential alliances and ensure the most strategic are facilitated.

Research

Nearly all of the documents that were analysed made some mention of the need for additional research. A number mentioned that current research capabilities were weak. Overwhelming, the largest number of references to research focused on the need to support and improve strategic decision-making. However, there was a lack of consensus as to the type of research required with several strategies stating that alternative approaches should be investigated. Some suggestions included:

- customised supply and demand modelling
- scenario planning
- forecasting
- benchmarking
- economic impact analysis
- environmental impact analysis
- cost-benefit analysis

It was noted in several strategies that there is a lack of monitoring and management of emerging issues and that research needs to be more forward-looking and strategic. Without this type of research the tourism industry fails to be properly supported by the very government that it looks to for direction and management. As the South Australian Tourism Commission’s (2002) *South Australian Tourism Plan 2003–2008* notes *with the pace of change, governments and institutions generally lag behind appropriate response to trends and issues* (pg. 9).

Furthermore, many of the documents postulated a need to build the recognition and communication of the full benefits and value of tourism by broadening it beyond the traditional direct impact on jobs and the economy. By doing so, the tourism industry will be supported by government and the community, will attract more investment and will grow in a more appropriate and resource efficient way.

Besides supporting investment and development decision making, it was also considered that there was a strong need to support marketing through market research into areas such as:

- consumer perceptions, motivations and expectations
- consumer satisfaction and loyalty
- brand tracking
- niche market or product (i.e. sport, education, and trip cycles/touring routes)

Research development was highlighted particularly at the regional and local level, probably due to the national and state/territory levels already being supported by relatively robust research in this area. At the regional and local level there were suggestions made for the development of a series of Triple Bottom Line indicators that could be maintained on an ongoing basis.

It was generally concluded that current research initiatives need to be maintained and developed in the following areas:

- research dissemination
- expenditure
- economic analysis (direct and indirect)
- relevance
- timeliness
- regional accuracy and reliability
- time series/updating

Finally, several strategies, particularly at the regional and local level suggested a need to work more closely with Universities and STCRC in order to develop innovative approaches to industry issues.

Adverse Externalities and Risk Management

Due to its very nature, the tourism industry has always struggled with externalities and risk management. A considerable number of strategies and plans mentioned recent dramatic and unforeseen events that have affected travel behaviour, including the Asian Economic Crisis, Terrorism, SARs, the Iraq War, September 11, the collapse of Ansett, geo-political conflicts and natural disasters.

However, as South Australian Tourism Commission's (2002) *South Australian Tourism Plan 2003–2008* points out:

> *Tourism is a resilient industry. [While] it has recently sustained unprecedented 'multiple shocks', [it has had] previous adversity such as the oil crisis, pilots' dispute and Gulf War before it, [which] have been followed by recovery and growth (pg. 6).*

Events, like those mentioned above, have increased visitors' concerns for safety and security. Dealing with public safety, crime and other hazards is of great concern to government, particularly at the local level due to little or no risk management planning to support the industry during their occurrence or in the recovery process. A number of strategies, particularly at the national and state/territory level note the need to develop and improve risk management and contingency planning through a coordinated and communicative approach. At the national level the *National Tourism Incident Response Plan* has already been developed and rolled out. There is a need to raise awareness of this type of planning and ensure it occurs across the industry and at all destination levels.

Technology's Impact on Tourism

Technology has been advancing and developing at a rapid pace, resulting in global structural change in business and people's perceptions. A number of the plans mentioned technology's impact on the distribution system. Most focused on how the Internet will affect the industry by increasing direct marketing, informing the customer, influencing communication channels (i.e. word of mouth) and changing competitive advantages (i.e. integration, alliances and innovation). The strategy also suggested that technology will affect the way travel information is accessed and booked, for example, via the Internet, mass media, multimedia products, search engines and mobile phones. A number of strategies at the state/territory level promoted the need to increase the industry's online presence and capabilities.

References to technological development in the strategic plans took a focus on online capabilities and marketing, with far less mention of developing production efficiencies and labour use reduction techniques. There are fears that innovation in technology may move at a faster rate than what the tourism industry is able to match. There is a need to improve existing business practices by encouraging new innovations that focus on building productivity and profitability. As the Restaurant and Caterers Australia and the Department of Industry, Tourism and Resources (2007) note in *The Business of Eating Out*:

> *Traditionally, while the restaurant and catering industry has been innovative in menu and food development, it has been slow to adapt to new technologies and methods of production that may lead to greater efficiencies and competitiveness. This is seen as a symptom of various factors, including the conservative approach adopted by many operators to new technologies and innovations, the high proportion of small businesses operating in the sector, relatively low operating profit margins, and the effectiveness of new technologies in the marketplace (pg. 28).*

Tourism needs to shift from its previous focus on growing jobs to one of improving standards of living through better working conditions, increased wages and higher education. In the future, the industry will be increasingly shaped by a constrained labour market. To remain profitable and viable the tourism industry must look to technology for innovations that will allow it to increase its productivity and reduce its reliance on labour.

Chapter 5

CONCLUSION

In recent years, Australia has dramatically altered the way it approaches tourism with an increasing emphasis placed on strategic destination management. However, despite the increased management approach, the analysis of seventy-six Australian tourism strategic plans revealed the industry is struggling due to a lack of growth in the market, among other challenges. The analysis found that there is a need to assess and refine current strategies to determine the best approach for the future.

This study has revealed that the tourism strategies in this analysis have focused on:

- product and market development through diversification and niche market development
- destination clustering through collaboration and networking
- leveraging Australia's many strengths (diversity of product)
- taking a 'Sustainable Tourism Destination Management' approach to planning

The strategies have called for:

- increased investment in tourism infrastructure
- further aviation development
- increased and targeted education and training
- industry advocacy and leadership
- more effective marketing
- improved research capabilities
- industry innovation and improved productivity

There is a need to take a more strategic approach to Australia as a tourism destination. In doing so it will be possible for the industry to strategically build a competitive advantage based on comparative advantages at the destination level. This would further reduce fragmentation, allowing destinations to become very unique, branded and focused on their strengths.

Appendix A: Coded References from the Analysis of Australian Strategic Plans

Category of Issue	Issue	Number of References
Marketing and its current effectiveness	Poor marketing & segmentation	25
	Brand marketing, development & integration	21
	Improve & increase marketing & promotion	18
	Need for cooperative & consistent marketing	18
	Develop a marketing strategy—online development, international approach, position management	8
	Strong brand	7
	Regions, markets, fashionability & mass tourism declining	6
	Strong Australian brand & marketing campaign	5
	Develop quality packaging & marketing collateral/visitor guides	5
	Target affluent interstate markets, high spending leisure visitors & the short break market	5
	Review, broaden & clarify positioning by creating a point of difference	5
	Target marketing	4
	Differentiate based on strengths	4
	Invest in & productively market regions—achieve economies of scale, return on investment & synergies	4
	Support marketing & leverage off major events	3
	Grow markets through wholesale & retail relationships & famils	3
	A decline in & a lack of destination marketing support & resources	2
	Shift towards marketing the primary motivators for travel & the 'experience seeker'	2
	Align & leverage from STO marketing campaigns & initiatives	2
	Aggressively market identified strengths & attractions	2
	Irrelevant brand, challenge to establish a strong destination brand	2
	Leverage off strong, positive & internationally recognised brands	2
	Lack opportunities for direct distribution of product & lack of in-market representation	2
	Sub-regions & organisations compete with regional brand/marketing	2
	Region often confused with other regions or sub-regions	2
	Destination approach to marketing	2
	Brand as an asset, align with market needs & product development	2
Distance and access	Develop Aviation	37
	Public transport issues	15
	Air transport liberalization—low-cost travel will influence travel demand	14
	Develop uniform directional & interpretative tourism signage that links with a brand	11
	Improve/upgrade inter-& intra-regional public transport	8
	Distances within Australia	8
	Improve access & transport	8
	Increase regional access i.e. Improve roads	7
	Directional & informational signage is currently of poor quality & consistency.	7
	Highly populous regions are more easily & comfortably accessed	6

Category of Issue	Issue	Number of References
	Strategic locations allow for growth	4
	Close to large population/capital city	4
	Access & Transport constraints—congestion, poor parking, seasonal air capacity	4
	Further develop cruise industry	4
	Easy access & compact diversity of some regions is a competitive advantage	4
	Larger or growing regions have issues with car parking & traffic congestion	3
	Limited direct access & high cost of aviation i.e. Fuel, emissions tax, airport service charges	3
	'Touring' as an activity—need to increase car hire facilities	3
	Decline in competitive access to Australia & certain regions	3
	Populous regions, or those near highways, generally have good road quality	2
	Improved road & rail services	2
	Drive through destination rather than stop-over	2
	Perception of access barriers—need adequate access for key markets	2
Destination Management	Sustainable Tourism Destination Management approach to planning	29
	Visitor Information Centres—develop, upgrade, coordinate & maximise use	21
	Regional Tourism Organisations—ensure right structure, increase active membership & industry representation, ensure they are accessible, well-funded, accountable, transparent, skilled in tourism & focused on core activities & strengths	18
	Funding—limited, insufficient, duplicated, spent on admin, variable, reliant on KPIs & grant funding	14
	Local government associations—levels, quality, awareness & relevance of tourism planning varies, some LGA's contribute significantly to tourism marketing & planning	10
	Need to manage & enhance stakeholder relationships i.e. RTO, STO, TA, LGA etc	4
	Confusion of roles for RTO, LTO, STO & levy boards—need to reduce overlap of functions	3
	Develop stakeholder forums, projects & networking activities	3
	Facilitate & enhance strategic alliances & linkages between tourism, government & the community	3
	Lack of capacity restricting growth—need to strengthen & build tourism industry capacity	3
	Develop & facilitate long term plans & strategies	3
	Regional tourism planning & destination development	3
	Destination Management & Planning	3
	Ensure sustainable & appropriate urban development—manage high tourism growth areas	3
	Economies are reliant on tourism with many regions development being led by tourism	3
	Form tourism action groups for implementing strategies	3
	A number of Australian destinations are in decline	2
	Commitment of industry to make tourism work	2
	Some regions are well funded—have successfully applied for funding for various tourism initiatives	2
	Develop Tourism Strategies based on research & resources, implement, monitor & evaluate strategies	2
	State Tourism Organisations—unclear information, poor coordination, inconsistent budgets, lack of marketing, strategies not linked & integrated with LGAs plans	2
	Build relationships with sub-regions & improve dispersal.	2

Category of Issue	Issue	Number of References
The Labour Market	Need to increase education, training, professionalism & skills (life-long learning)	28
	National labour & skills shortages	15
	Increase training, education & accreditations effectiveness & targeting	11
	Need to increase staff retention & recruitment: overcome poor working conditions & wages	9
	Develop the industry's Human Resource Management	8
	Flexible but transient tourism labour market (i.e. Working Holiday Makers)	6
	Develop a tourism workforce development plan—careers campaign, cross-border employment, labour portability arrangements	6
	Tourism jobs in regional areas lack trained tourism workers	5
	Operators lack skills & need training	5
	Enhance industry knowledge	5
	Tourism creates new & a diverse range of employment opportunities	4
	Develop the tourism labour market including indigenous employees	4
	Identify training gaps—skills & labour audit	4
	Seasonality, weekend fluctuations & 24/7 nature of the industry affects labour market	3
	Changes in the labour market i.e. casualisation, long working hours, leave being accumulated	3
	Liaise with industry & training & vocational education providers to ensure appropriate tourism training	3
	Need to maintain & improve a uniform high standard of service through training	3
	Reforms to workplace relations & superannuation	3
	Managers/owners lack time & incentive to undertake training & development	3
	High quality labour due to quality training & education system	2
	Poor perceptions of the industry as an employer	2
	Develop a nationally recognised database of preferred tourism trainers	2
	Develop & build a strong tourism workforce	2
Infrastructure and investment	Plan, promote, attract & increase investment in tourism infrastructure	32
	Lack or variable quality of basic facilities—need to develop this area	15
	Develop new or upgrade existing accommodation—particularly mid-range or specialty	15
	Low or lack of private sector investment (due to low demand/yield)	14
	Regional or niche market infrastructure gaps/issues	8
	Strong investment occurring in some destinations	7
	Australia generally has well developed infrastructure	6
	Population & visitor growth will support infrastructure development in some regions	5
	Oversupply, undifferentiated & consolidation of certain destinations, accommodation & attractions	4
	Sustainable Tourism infrastructure development	3
	Decrease planning issues, changes & restrictions	3
	Uncoordinated or poor development —non-complying, poor design, lack of strategic leadership	3
	High occupancy & yield levels	3
	Need to ensure maximum use of existing infrastructure	2
	Increase economic impact of tourism investment & infrastructure development	2
	Ongoing funding to ensure infrastructure complies with Australian Standards	2

Category of Issue	Issue	Number of References
	Variable quality of infrastructure—different levels of upgrading, refurbishment & professionalism	2
	Maintain current infrastructure & maximise its use	2
	Develop partnerships to build tourism infrastructure, Increase industry & cooperative investment	2
	Infrastructure impediments to tourism development	2
	Lack of Public funding for infrastructure development & maintenance i.e. Public transport	2
Industry Structure	Development through clustering i.e. cooperation, coordination, collaboration, representation, partnerships & networking	41
	Lack of industry cohesion & structure (fragmented, dispersed, dominated by SMEs)	20
	Work with other regions, tourism bodies, industries & cross government	12
	Highly developed, dynamic, diverse, resilient, strong, large & adaptable industry (passionate people)	10
	Lack of industry lead strategic management—lack of direction	10
	Need for industry & government leadership & coordination for tourism	6
	Conservative nature slowing diversification, innovation, use of technology & training	4
	Need for an industry-led body or association	3
	Need to develop, improve & manage supply chains	3
	Lack of defined approach to developing inter & intra regional linkages	3
	Low understanding of tourism structure—businesses sometimes don't recognise themselves as part of tourism, some sectors are not recognised as a part of tourism	3
	Increase industry leadership, business participation & collaboration	2
	There is a strong & committed Industry peak body with national coverage	2
	Communicate with ITOs	2
	Take a bottom up approach to the industry—decentralise & encourage local participation	2
	Develop a strong professional & profitable industry, Tourism business development	2
	Corporate ethics & compliance	2
Product and market development	Product & market development i.e. Diversification & niche market development	63
	Lack of product diversity, development & renewal	17
	Identify, prioritise & develop iconic products & experiences based on existing synergies & core strengths—constrained by access & development issues	14
	Need new markets, products, experiences & services	10
	Target markets that reduce risk & seasonality	6
	Ample variety of established Tours, Attractions & Activities	4
	Create & promote unique products	3
	New products in development	3
	Develop the Inbound market	2
	Identify & align individual products & experiences for development with overall strategy	2
	Design products to meet market needs	2
	Develop products that will be or are profitable—sustainable product development	2
	Strengthen & refresh existing markets	2

Category of Issue	Issue	Number of References
Demand, awareness and appeal	Declining or flat growth in visitation from core markets—plans to grow declining markets	28
	Good image, brand recognition, reputation & awareness of region	15
	Seasonal & fluctuating demand in the industry—particularly regionally	15
	Low awareness & poorly defined—regional & niche	11
	Demand for extended, standardised & consistent operating hours i.e. for shopping, restaurants, bars & cafes to overcome issues with accessing meals & merchandise	8
	Improve positioning & increase awareness & appeal by value adding to current strengths & increasing consumer awareness	5
	Demand for customised holidays & unique experiences, Customised holidays & niche market tours becoming increasingly popular, growing interest in niche markets	5
	Emerging travel markets in developing countries (i.e. China & India) will influence travel demand & create new business opportunities	5
	Poor image of Australian destinations	3
	Demand for experiential tourism, active holidays & for "learning holidays"	3
	Market awareness of where particular destinations are but not translated into interest or intention Other destinations more competitive—higher market awareness & international air access	3
	Weak market share	3
	Increase visitation & length of stay	3
	Economic growth of China & India stimulating tourism demand	2
	Established markets with high awareness of product	2
	Heavy reliance on certain low growth markets	2
	Industry has had good growth	2
	Strong appeal in the international markets for the generic beach holiday	2
Politics	Raise the profile of the tourism industry with the government & community—minimise the negative impacts & promote positive effects	31
	Develop & improve tourism policy, decision making, advocacy & coordination (Strategy Division)	17
	Clearly define roles & responsibilities—enhance coordination	9
	Decrease & simplify taxation, regulations & compliance costs	8
	Take a 'whole of government/region' approach to tourism	8
	Regional economic agreements & 'Approved Destination Status'	7
	Increased local government support & involvement in tourism	6
	Strong parochial, negative or complacent attitudes about tourism	5
	Community resistance towards tourism—work with community on tourism planning & development, develop partnerships with major community groups	5
	Commonwealth Governments 10 year Tourism Strategy, the Uhrig review & the view that Government is not keeping Tourism White Paper promises	4
	Strengths in tourism planning & strategic thinking	3
	LGA, RTOs, LTOs & tourism levy boards lack awareness of tourism issues	3
	Tourism has under-developed public relations & lacks a unified political position	3
	Tourism lacks integration into regional destinations	3
	Join the UNWTO	2
	Government recognition of the benefits of tourism	2
	Changing government policy—government elections	2

Category of Issue	Issue	Number of References
Politics	Some sectors of tourism have legislation-based advantages, Potential political backlash from areas that are not identified priority	2
Research	Develop market research—motivation, satisfaction, brand tracking, product development	20
	Research aimed at improving decision-making	18
	Need to build industry's research capacity & application—particularly at the regional level	9
	Lack of research, modelling, forecasting, data & analysis by niche market/product	7
	Weak research capabilities	6
	Need to increase research dissemination—including online accessibility	5
	Undertake gap analysis/audit of destinations (i.e. Infrastructure, labour)	5
	Develop a series of destination based indicators for the triple bottom line	4
	Work with Universities & STCRC for research	4
	Improve current research—particularly expenditure & economic (direct & indirect) analysis	4
	RTO to provide region specific data, research & advice	4
	Increase research, technology & innovation through a planned strategy & action groups	5
	Benchmark restaurant & hotel occupancy & winery operators nationally	3
	Need to maintain current visitor research	2
	Collate & summarise all past research & update old studies & assess change	2
Price, yield and dispersal	Maximise & grow yield & dispersal— target high yield experience segments	29
	Increase & improve tourism packaging & value adding	17
	Australia is seen as expensive—reduced affordability	7
	Affects of the introduction of low cost carriers (i.e. Increased outbound travel)	5
	Lack of affordable accommodation particularly in regional areas	4
	Focus on regional development of products & experiences & increasing visitor dispersal	4
	Encourage longer stays	4
	Increased costs of domestic travel	3
	Impact of discounting on quality goods i.e. Online discount travel booking sites	3
	Increased price sensitivity	2
	Policy & pricing issues—need pricing strategy	2
	Mass produced, cheap & imported tourism products threatening unique & quality products & creating a credibility issue	2
	Low operating profit margins, Low profits & low yields	2
Product strengths	Leverage Australia's many strengths	48
	Marketing should focus on strengths & synergies	10
	Strength in diversity	6
	There are both natural & built attractions	5
	Potential to increase & promote local products	3
	Can't cater to Australia's core strengths	2
	Lack of a single product strength	2
	The 'reality' of Australia	2

Category of Issue	Issue	Number of References
The Environment	Tourism impacts on the environment i.e. long haul flights	14
	Climate change & global warming	11
	Environmental sustainability & social awareness	10
	Australia has many natural attractions that need management	9
	Investigate, create & apply best practice international sustainable development & environmental models & guidelines	8
	Conserve ecological assets & manage access	5
	Develop interpretive centres & ecotourism	4
	Need to protect ecosystems & increase awareness of conservation	3
	Improve eco-efficiency, encourage waste/litter reduction, promote public transport	3
	Need to adopt to a carbon constrained economy—'carbon managed' economy	2
Adverse externalities and risk management	Dramatic unforeseen events or disasters affect travel behaviour	22
	Visitor safety & security—negative perceptions or publicity	10
	Develop & improve risk management & contingency planning	8
	Risk & prohibitive costs associated with public liability insurance	6
	Effects of new laws impacting on tourism	6
	External threats with little risk management	5
	Globalisation & increased competition	5
	Drought & water supply issues	3
	Australia is a safe & friendly destination	2
	Worldwide standardised security measures will increase airfares	2
	Environmental, social & cultural change	2
The Economy	Fluctuating Australian & Global	35
	Tourism businesses poor access to capital & low profitability	9
	Tourism as a tool for economic development	9
	Structural changes & growth occurring within the regional or greater economy	8
	Increasing growth in developing Asian economies	3
	Strengthen the link between economic development & tourism	2
	Global economic growth & the health of source market economies	2
Technology's impact on tourism	Impact on the tourism distribution system	30
	Rapid change in technology—distribution, communication, information & transport	8
	Increasing Tourism Businesses productivity	7
	Mass media & online presence increasing consumers awareness of tourism products	7
	Innovation in technology may move quicker than tourism industry & only occur in certain areas/businesses	4
	Little development in productivity or business processes	3
	Increase & encourage industry's awareness & use of technology & innovation to build competitiveness	2

Category of Issue	Issue	Number of References
Service and Product Quality	Develop service & product quality to meet higher consumer expectations	15
	Develop accreditation/licensing/certification & encourage uptake & compliance	9
	Varying service levels & product quality	5
	Quality Destination associated with quality products & service	4
	Poor or inconsistent customer service—need to be reviewed	4
	Increase industry capabilities, capacity, professionalism & standards	4
	Maintain quality & presentation of destinations & products	3
	Increase & improve the excellent network of accredited visitor information centres (VIC)	2
	Unstructured & non-accredited operators	2
	View that Australia & some icon locations are overcrowded	2
	Service levels constrained (i.e. by labour/culture) & not meeting market expectations	2
Major and Business Events	Further develop, attract & retain Major & Business events	22
	Develop a national Events Strategy & Annual Events Calendar	10
	Develop business, convention & incentive travel	7
	Link & coordinate events with other sectors that have synergies	7
	Range of community based events, festivals & conferences in regional & rural areas	5
	Few major events & those in place are declining	3
Changing Consumer behaviour	Changing consumer behaviour, demographics & holiday patterns	25
	Ageing population & Baby boomers retirement (more leisure time) creating new demand	7
	Changing household consumption patterns, higher levels of debt	6
	Increase in stress & increased focus on natural remedies & health & fitness.	2
	Travel is of diminishing interest to Australians—weak domestic tourism	2
Increasing competition	Increasing competition i.e. With other destinations & with other industries	21
	Reduced leisure time & discretionary spending couples with more substitutes for travel	6
	Competition for positioning—other regions identified as competitors rather than alliances, destinations diversifying into & strengthening products that are other regions strengths	5
	Strong & competitive product	2
	Become the major destination for core strength	2
Indigenous tourism	Grow, develop & promote Indigenous tourism to meet demand	15
	Indigenous land access, tenure & management	5
	Engage the Indigenous people & increase their employment & stability	5
	Indigenous Tourism Australia & an Indigenous tourism strategy	3
	Lack of product due to difficulties with organisation, access & packaging	3
	Focus has been on Indigenous tourism business development	2
	Range of Indigenous art, cultural & heritage products	2

This table excludes those issues mentioned only once. However when determining top line topic rankings they were included.

Appendix B: All Strategies Obtained

Level	Organisation	Year	Document	Website or contact
National	Australian Government	2003	Tourism Green Paper	http://www.ret.gov.au/Documents/TourismGreenPaper20031107160414.pdf
National	Australian Government	2003	Tourism White Paper	http://www.industry.gov.au
National	Department of Industry Tourism Resources (DITR)	2007	Australian Government National Tourism Investment Strategy	http://www.ret.gov.au/Documents/AGresponse_jan20070110165941.pdf
National	Department of Resources, Energy and Tourism		Tourism	http://www.ret.gov.au/section/Tourism/Pages/default.aspx
National	Department of Resources, Energy and Tourism		Tourism Action Plan for Climate Change	
National	Department of Resources, Energy and Tourism	2008	Industry Quality and Standards	
National	Department of Resources, Energy and Tourism	2008	National Tourism Accreditation	
National	Department of Resources, Energy and Tourism	2007	National Tourism Incident Response Plan	http://www.ret.gov.au/Documents/NTIRP20070321093000.pdf
National	Department of Resources, Energy and Tourism	2005	Restaurant and Catering Industry Action Agenda	http://www.ret.gov.au/General/Tourism-ILT/Pages/RestaurantandCateringIndustryActionAgenda.aspx
National	Department of Resources, Energy and Tourism	2007	Tourism White Paper Annual Progress Report 2006	http://www.ret.gov.au/Documents/TWP_Progress_Report_0620070420171843.pdf
National	Tourism Australia		Experience Seeker	ksuckling@tourism.australia.com
National	Australian Tourist Commission (ATC)	2007	Olympic Games Tourism Strategy	
National	Tourism Events Australia		Tourism Events Australia Discussion Paper	
National	Tourism Australia	2006	Action Plan for Japanese Tourism: Embracing change	http://www.ret.gov.au/Documents/FINAL_JAPAN_ACTION_PLAN2006_23030620060323122603.pdf
National	Tourism Australia		National Road Tourism Strategy Fact Sheet	http://www.tourism.australia.com/content/Niche/NRTSFactSheet.pdf
National	Tourism Australia		A Uniquely Australian Invitation: Strategy and Execution	http://www.tourism.australia.com/content/Destination%20Campaign/Strategy%20and%20Execution.pdf
National	Tourism Australia	2007	Planning for Inbound Success	http://www.tourism.australia.com/content/Marketing/planning_for_inbound_success/planning_for_inbound_success_2007.pdf
National	Tourism Australia	2002	China Strategy Study and Actions	http://www.tourism.australia.com/content/Research/China_study_101002.pdf
National	Tourism Australia	2007	Tourism Australia's Corporate Plan	http://www.tourism.australia.com/content/About%20Us/Corp_plan0708_0910.pdf
National	Indigenous Tourism Australia	2007	National Strategy for Indigenous Tourism 2007–2012	http://www.indigenoustourism.australia.com/content/PDF/Indigenous%20Roadshow%20Rpt%20LR.pdf
National	Department of Industry Tourism Resources (DITR)	2006	Revised Action Plan for the Development of the Australia-Pacific Cruise Industry 2006	http://www.tourism.australia.com/content/aussie_experiences/2007/RevisedActionPlanForAustralianCruiseIndustry2006.pdf
National	Sport and Tourism Division	2000	Towards a National Sports Tourism Strategy	http://catalogue.ausport.gov.au/fulltext/2000/feddep/SportTourismStrategy.pdf
National	Tourism Research Australia	2008	Through the looking glass	http://www.tra.australia.com/content/documents/Domestic%20Stage%203/FINAL%20-%20Through%20the%20looking%20glass.pdf
National	Winemakers Federation of Australia	2007	Wine Australia: Directions to 2025	http://www.wfa.org.au/positioning.htm

Level	Organisation	Year	Document	Website or contact
National	OCDE	2003	National Tourism Policy Review of Australia	http://www.ret.gov.au/General/Tourism-BMET/Pages/nationalTourismInvestmentStrategy.aspx
National	AusIndustry	2008	Business Ready Program for Indigenous Tourism	http://www.ausindustry.gov.au/library/BRPIT_Feb08_final20080229023449.pdf
National	AusIndustry	2008	Australian Tourism Development Program	http://www.ausindustry.gov.au/library/ATDP_final_feb200820080229015736.pdf
national	Restaurant and Caterers Australia and the Department of Industry Tourism and Resources	2007	The Business of Eating Out—Including Status updates Part 1, 2 and 3	http://www.ret.gov.au/Documents/
national	Tourism and Transport Forum	2003	New Investment Frontiers	http://www.ttf.org.au/research/pdf/newinvest/NIFFull.pdf
national	Tourism and Transport Forum	2006	National Tourism Partnerships Action Plan	http://www.ttf.org.au/research/pdf/2007/TTF_Natural_Tourism_Partnerships_Action_Plan.pdf
State	Tourism New South Wales	2002	Towards 2020: New South Wales Tourism Masterplan	http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib10/Masterplan%20-%20Full%20Version.pdf
State	Tourism New South Wales	2008	Tourism New South Wales Surf Tourism Strategy Summary	http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib14/GDayUSA_SurfTsmStrategy_FactSheet_FINAL.pdf
State	NPWS	2001	NPWS Lighthouses Conservation Management and Cultural Tourism Plan	http://www.environment.nsw.gov.au/resources/parks/lighthousesCmp12ManagingTourism.pdf
State	NPWS	2001	Cultural Tourism Plan	http://www.environment.nsw.gov.au/resources/parks/lighthousesCmp22CulturalTourismPolicies.pdf
Regional	Tourism New South Wales	2002	South Coast: Regional Tourism Plan 2003–2006	http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib13/South_Coast_regional_Tourism_Plan.pdf
Regional	NSW Government Department of Planning	2005	Illawarra and South Coast Regional Strategies	http://www.saveourbermagui.org/docs/BACKGROUND%20PAPER_RDS%20Sept%2005.PDF
Local	Department of Infrastructure, planning and natural resources	2004	Twofold Bay	http://www.planning.nsw.gov.au/plansforaction/illawarraandsouth.asp
Local	Manly Council	2006	Manly Sustainability Strategy: For Today and Future Generations	http://www.manly.nsw.gov.au/Sustainability-Strategy.html
Regional	Tourism New South Wales	2000	Snowy Mountains: Regional Tourism Plan 2001–2004	http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib13/Snowy_Mountains_regional_Tourism_Plan.pdf
Local	Tumbarumba Shire Council	2006	Tumbarumba Shire Council Tourism Strategy	http://www.tumbashire.nsw.gov.au/news/pages/2410/NewsDoc/DraftTourismStrategy.pdf
Regional	Tourism New South Wales	2002	Capital Country: Regional Tourism Plan 2003–2006	http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib13/Capital_Country_regional_Tourism_Plan.pdf
Regional	Tourism New South Wales	2002	Riverina: Regional Tourism Strategy 2003–2006	http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib13/Riverina_regional_Tourism_Plan.pdf
Regional	Riverina Regional Tourism	2008	Riverina Regional Tourism Strategic Plan 2008–2009 DRAFT	Fiona Last, Email. Naturally@riverinatourism.com.au
Regional	Riverina Regional Tourism Inc. & Tourism New South Wales	2003	Regional Tourism Action Plan (2003–2007)	Fiona Last, Email. Naturally@riverinatourism.com.au
Local	Orange City Council	2003	Orange City Cultural Plan	http://www.orange.nsw.gov.au/download.cfm?DownloadFile=3CF04011-E7F2-2F96-3F3463F6485B33B2
Local	Orange City Council	2006	Orange City Council Strategic Heritage Plan	http://www.heritage.nsw.gov.au/docs/incentives/hs_orange.pdf
Local	Dubbo City Council	2007	Dubbo City Council Corporate Strategic Plan 2007–2027	http://www.dubbo.nsw.gov.au/repositories/files/CorporateStrategicPlan2007-2027.pdf
Regional	Tourism New South Wales	2005	Building Australia's premier tourism region: A vision for tourism development in the Hunter Region 2005–2008	Keith.baker@tourism.nsw.gov.au

Level	Organisation	Year	Document	Website or contact
Regional	Hunter Regional Tourism Organisation, Calais Consultants and Globe Consulting	2005	The Hunter Region Strategic Tourism Plan	Not Applicable: sourced by the Sustainable Tourism Cooperative Research Centre
Regional	Tourism New South Wales	2003	North Coast NSW: Regional Tourism Plan 2004–2007	http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib13/North_Coast_regional_Tourism_Plan.pdf
Local	Bellingen Shire Council	2007	Bellingen Shire Tourism Strategy	http://www.bellingen.nsw.gov.au/files/1824/File/Bellingen_Shire_Strategic_Tourism_Plan_2007_ADOPTED.pdf
Local	Port Stephens council and the New South Wales Government	2007	Tomaree events Strategy 2007–Part 1	http://www.portstephens.nsw.gov.au/files/64912/File/TomareeEvent_FINALpart1.pdf
Local	Port Stephens council and the New South Wales Government	2007	Tomaree events Strategy 2007–Part 2	http://www.portstephens.nsw.gov.au/files/64913/File/TomareeEvent_FINALpart2.pdf
Regional	Tourism New South Wales	2001	Northern Rivers Tropical NSW: Regional Tourism Action Plan 2002–2005	http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib13/Northern_Rivers_regional_Tourism_Plan.pdf
Local	Tweed Heads Ministerial Taskforce	2004	Part 2 Town Centre Development Strategy: 2.6 Tourism Strategy	http://www.iplan.nsw.gov.au/tweedheadstaskforce/eds/part2/tourism.jsp
Regional	Tourism New South Wales	2000	New England North West NSW: Regional Tourism Plan 2001–2005	http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib13/New_England_regional_Tourism_Plan.pdf
Regional	Tourism New South Wales	2004	Outback NSW Tourism Development Plan 2004–2008	http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib13/Outbacknsw_regional_Tourism_Plan.pdf
Local	Upper Lachlan Tourist Association		Strategic Plan 2007–2012	Scott Pollock, email. crookwellvisitor@bigpond.com
Regional	Tourism New South Wales	2003	Central NSW: Regional Tourism Plan 2004–2007	http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib13/Central_NSW_regional_Tourism_Plan.pdf
Regional	Tourism New South Wales	2003	Blue Mountains: Regional Tourism Plan 2004–2007	http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib13/Blue_Mountains_regional%20Tourism_Plan.pdf
Local	Tallaganda Shire Council	2001	Tallaganda Economic Development Plan	www.palerang.nsw.gov.au/files/1776/File/economicdevelopmentplan.doc
State	Victoria Tourism Industry Council and Victoria Events Industry Council	2006	Tourism and Events Strategy 2016	http://www.vecci.org.au/resources/tourism+and+events+strategy+2016.pdf
State	Tourism Victoria		The Significance of Tourism Strategic Plan 2002–2006	http://www.tourism.vic.gov.au/strategicplan/plan2002_2006/pdfs/section2.pdf
State	Tourism Victoria	2002	Victoria's Tourism Industry Strategic Plan Summary 2002–2006	http://www.tourism.vic.gov.au/strategicplan/plan2002_2006/pdfs/summary_version.pdf
State	Tourism Victoria	2002	Victoria's Tourism Industry Strategic Plan 2002–2006	http://www.tourism.vic.gov.au/strategicplan/plan2002_2006/pdfs/complete_plan.pdf
State	Tourism Victoria	2003	Victoria's Tourism industry Strategic Plan 2002–2006 Addendum 2003	http://tourism.vic.gov.au/strategicplan/plan2002_2006/addendum_oct_03.htm
State	Tourism Victoria	2004	Victoria's Tourism Industry Strategic Plan 2002–2006 Addendum 2004	http://tourism.vic.gov.au/strategicplan/plan2002_2006/addendum_oct_04.htm
State	Department of Innovation, Industry and Regional Development	2006	Tourism and Events Industry Strategy	http://www.diird.vic.gov.au/corplivewr/_assets/main/lib60026/tourism-strat.pdf
State	Tourism Victoria	2007	Tourism Victoria Business Plan 2008–2011	http://www.tourism.vic.gov.au/images/stories/3yearplan.pdf
Regional	Tourism Victoria	2004	Melbourne and Surrounds: Regional Tourism Development Plan	http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/rtdp_melbourne_surrounds.pdf

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Regional	Tourism Victoria	2005	Mornington Peninsula: Regional Tourism Development Plan 2004–2007	http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/mornington-peninsula-rtdp-2005-update.pdf
Regional	Tourism Victoria	2005	Macedon Ranges and Spa Country Regional Tourism Development Plan 2004–2007	http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/macedon-ranges-and-spa-country-rtdp-2005-update.pdf
Regional	Tourism Victoria	2005	Yarra Valley, Dandenong's and the Ranges Regional Tourism Development Plan 2004–2007 update	http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/yarra-valley-dandenongs-and-the-ranges-rtdp-2005-update.pdf
Local	Hobson Bay City Council	2006	Hobson's Bay City Council: Sustainable Tourism Strategy	http://www.hobsonsbay.vic.gov.au/Files/SustainableTourismStrategy.pdf
Local	City of Port Philip	2007	2007–2010 Tourism Strategy	http://www.portphillipbusiness.com.au/
Local	Bayside City Council	2001	Bayside Tourism Strategy	http://www.bayside.vic.gov.au/Documents/bayside_tourism_strategy2001.pdf
Local	Manningham City Council	2007	Tourism Strategy Plan for Manningham City Council	http://www.manningham.vic.gov.au/CA256CE100066A7B/Lookup/DraftTourismStrategicPlanforManningham%2ePDF%5f992Kb/$file/Draft%20Tourism%20Strategic%20Plan%20for%20Manningham.PDF
Local	Latrobe City Council	2006	Latrobe 2021: The vision for Latrobe Valley	http://www.latrobe.vic.gov.au/WebFiles/Council%20Documents/Council%20Plan/Latrobe%202021%20-%20The%20Vision%20for%20Latrobe%20Valley%20(Version%204).pdf
Regional	West Wimmera Tourism	2004	West Wimmera Tourism Strategy	Mary Lu Amos, email. Mary-luAmos@westwimmera.vic.gov.au
Local	Gannawarra Shire Council	2008	Gannawarra Shire Councils tourism strategy Discussion Paper	http://www.gannawarra.vic.gov.au/Files/GannawarraTourismDiscussionPaper22Feb2008.pdf
Local	Glenelg Shire Council	2007	Glenelg Shire Strategic Tourism Plan 2005–2008	http://www.glenelg.vic.gov.au/Files/GSCStrategicTourismPlan2005_2008AdoptedatOCM20December2005.PDF
Local	Colac Otway Shire Council	2004	Economic Development and Tourism Strategy	http://www.colacotway.vic.gov.au/Files/EDandTStrategy.pdf
Regional	Colac Otway Shire Council	2005	Opportunities in Horticulture and Organic Food Production in the Colac Otway Shire	http://www.colacotway.vic.gov.au/Files/HorticultureandOrganicFoodProduction.pdf
Regional	Colac Otway Shire Council	2002	Colac Otway Shire Five Year Nature-based Tourism Strategy	http://www.colacotway.vic.gov.au/Files/NatureBasedTourismStrategy.pdf
Regional	Colac Otway Shire Council	2001	Colac Otway Shire Food and Wine Tourism Strategy	http://www.colacotway.vic.gov.au/Files/ColacOtwayFoodandWineTourismStrategy.pdf
Regional	Colac Otway Shire Council	2005	Colac Otway Marketing Strategy	http://www.colacotway.vic.gov.au/Files/ColacMarketingStrategy.pdf
Local	Corangamite Shire Council	2001	Corangamite Shire Tourism Strategy	http://www.corangamite.vic.gov.au/Files/Tourismstrategy.pdf
Local	Tourism Victoria	2004	Grampians Regional Tourism Development Plan	http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/RTDP_Grampians.pdf
Local	Tourism Victoria	2005	Grampians Regional Tourism Development Plan—update	http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/grampians-rtdp-2005-update.pdf
Local	Greater Bendigo City Council	2005	City of Greater Bendigo Council Plan 2005–2009	http://www.bendigo.vic.gov.au/Files/COGBCouncilPlanUpdate.pdf
Local	Tourism Frankston	2003	Frankston Tourism Strategy	
Regional	Moira Shire		Moira Shire Community Plan	http://www.moira.vic.gov.au/council_government/downloads/Community%20Plan%2003-04.pdf

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Local	Mitchell Shire Council		Mitchell Shire Council: Council Plan 2007–2011	http://www.mitchellshire.vic.gov.au/Files/Council_Plan_2007-2011.pdf
Local	Benalla Rural City Council	2005	Benalla Tourism Strategy 2005–2010	http://203.210.97.151/Files/Tourism_Strategy.pdf
Regional	Tourism Victoria	2004	Gippsland Regional Tourism Development Plan	http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/rtdp_gippsland.pdf
Regional	Tourism Victoria	2006	Gippsland Regional Tourism Development Plan Review	http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/RTDP_Gipps-review-06_2.pdf
Local	Wellington Shire Council	2006	Wellington Shire Council: Tourism Industry Strategy	http://www.wellington.vic.gov.au/Files/Tourism_Strategy2006-2011.pdf
Regional	Tourism Victoria	2004	North East Victoria Regional Tourism Development Plan	http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/rtdp_nev.pdf
Regional	Tourism Victoria		North East Victoria Regional Tourism Development Plan—update	paul.albone@tourism.vic.gov.au
Local	Surf Coast Victoria	2006	Tourism Strategic Plan for the Surf Coast Region	http://www.surfcoast.vic.gov.au/Tourism/Documents/Tourism_Strategic_Plan.pdf
Local	Surf Coast Shire	2006	Tourism Strategic Plan for the Surf Coast Region	http://www.surfcoast.vic.gov.au/Tourism/Documents/tourism_strategic_plan_2006.pdf
Regional	Geelong Otway Tourism	2007	Strategic Plan 2007–2010	http://www.geelongotway.org/uploads/395616632___2007-2010StrategicPlan.pdf
Regional	Geelong Otway Tourism	2007	Action Plan 2007–2010	
Local	Hepburn Shire Council		Hepburn Shire Council: Review of Agricultural Land and Rural Land Use in Hepburn Shire to Facilitate a Detailed Review of the Implementation of the New Rural Zones throughout the Shire	http://www.hepburnshire.com.au/Files/HepburnRAROverviewPart1070516.pdf
Local	Hepburn Shire Council		Hepburn Shire Council: Part 2 Strategic planning unit summaries and draft unit conclusions	http://www.hepburnshire.com.au/Files/HepburnRARPart2Planningunits070516.pdf
Local	Ballarat City Council	2006	City of Ballarat Economic Development Strategy 2006	http://www.businessballarat.com/images/Att%201%20-%20Final%202006%20Ballarat%20Economic%20Development%20Strategy%20-%20Aug%2020062.pdf
Local	Tourism Victoria	2004	Murray: Regional Tourism Development Plan	http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/RTDP_Murray.pdf
Local	Tourism Victoria	2005	Murray: Regional Tourism Development Plan— update	http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/murray-rtdp-2005-update.pdf
Regional	Tourism Victoria	2005	Phillip Island Regional Tourism Development Plan 2004–2007—update	http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/phillip-island-rtdp-2005-update.pdf
Regional	Tourism Victoria	2004	Great Ocean Road: Tourism Development Plan	http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/RTDP_GOR.pdf
Regional	Tourism Victoria	2005	Great Ocean Road: Tourism Development Plan—update	http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/great-ocean-road-rtdp-2005-update.pdf
Regional	Tourism Victoria	2004	Goldfields: Tourism Development Plan	http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/RTDP_Goldfields.pdf
Regional	Tourism Victoria	2005	Goldfields: Tourism Development Plan—Update	http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/goldfields-rtdp-2005-update.pdf
Regional	Shipwreck Coast Tourism Association	2004	Shipwreck Coast Tourism Association Strategic Business Plan, July 2004–June 2007	http://www.shipwreckcoast.com.au/sct_plan.pdf
State	Tourism Queensland; Queensland Tourism Industry Council	2008	Queensland Tourism Strategy	http://www.tq.com.au/tqcorp_06/index.cfm?E98B24EA-BF4E-9693-F458-46147C183D91

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State	Tourism Queensland	2003	Tourism Management in Queensland Protected Areas	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=5FDD22E5-D9B6-577D-431C-DD3F4EF4BD3D&siteName=tqcorp_06
State	Tourism Queensland	2002	Queensland Commercial and Tourism Aviation Plan	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=3C71B913-0D5E-46C8-A694-B3A86D48088C&siteName=tqcorp_06
State	Tourism Queensland		Cruise Shipping	
State	Tourism Queensland	2003	Queensland Ecotourism Plan	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=5F674A8E-0048-F159-B7EB-BB1D473F0FF4&siteName=tqcorp_06
State	Department of Tourism, Fair Trading and Wine Industry Development, Tourism Queensland	2004	Queensland Wine Industry Development Strategy	http://www.dtftwid.qld.gov.au/_Documents/Wine-Strategy/WID-Strategy-Full.pdf
State	Dalrymple Shire Council, Flinders Shire Council, Tourism Queensland and Queensland Parks & Wildlife Service	2005	Sub-regional Nature based tourism strategy	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=5FDD7275-A7E7-2943-D067-2411842384BB&siteName=tqcorp_06
State	Tourism Queensland	2004	Indigenous tourism strategy	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=65020C01-02B7-4FBA-BD8C-130751226384&siteName=tqcorp_06
State	Tourism Queensland		Tourism Skills Development Guide: Building Queensland's Regions	http://www.tourismskillsdevelopmentguide.com/00_pdfs/infosheet_02.pdf
Regional	Tourism Queensland	2007	Destination Management Plan for Tourism in South East Queensland Country	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=8D6D630B-C382-1795-6D6B-C88ED474684C&siteName=tqcorp_06
Regional	Queensland Government Office of Urban Management		South East Queensland Regional Plan 2005–2026	http://www.dip.qld.gov.au/resources/plan/SEQ/SEQ_regional_Plan_2005_2026.pdf
Local	Gold Coast City Council	2007	Gold Coast 2010: Economic Development Strategy—Overview	http://businessgc.com.au/uploads/eds_2007_overview.pdf
Local	Gold Coast City Council	2007	Gold Coast 2010: Economic Development Strategy—Action Plan	http://businessgc.com.au/uploads/eds_2007_actionplan.pdf
Local	Gold Coast City Council	2002	Our Gold Coast: The preferred tourism future	
Regional	Gold Coast Tourism	2006	Gold Coast Tourism: Five Year Plan	Steven Holle, email. Steven.holle@gctourism.com
Regional	Tourism Queensland	2005	Gold Coast Destination Management Plan	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=63F6D97A-B630-50B2-A179-89ED4908C4E5&siteName=tqcorp_06
Regional	Tourism Queensland		Brisbane Destination Management Plan 1	http://www.tq.com.au/tqcorp_06/index.cfm?681EDA28-D56E-789F-E8DE-3DD46B096312
Regional	Tourism Queensland		Brisbane Destination Management Plan 2	http://www.tq.com.au/tqcorp_06/index.cfm?681EDA28-D56E-789F-E8DE-3DD46B096313
Regional	Tourism Queensland		Brisbane Destination Management Plan 3	http://www.tq.com.au/tqcorp_06/index.cfm?681EDA28-D56E-789F-E8DE-3DD46B096314
Local	Brisbane Marketing	2007	Brisbane Destination Management Plan: Draft	http://www.brisbanemarketing.com.au/UserFiles/Brisbane%20Draft%20DMP.pdf
Local	Logan City Council		Logan City Economic Development Strategy	http://www.loganbiz.com.au/pdf/EDSglossy2003-2006.pdf
Regional	Tourism Queensland	2004	Sunshine Coast Destination Management Plan	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=63FFE5CD-D5BC-D9C0-D1B2-D3A528A8B0CD&siteName=tqcorp_06
Regional	Tourism Sunshine Coast	2007	Annual Report 2007	http://www.tourismsunshinecoast.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=B1B607CC-EB9C-0AE0-114B-11076A10BC3D&siteName=rtn2

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Regional	Tourism Queensland and Tourism Sunshine Coast	2004	Sunshine Coast Destination Management Plan	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=63FFE5CD-D5BC-D9C0-D1B2-D3A528A8B0CD&siteName=tqcorp_06
Regional	Tourism Queensland		Western Downs Destination Management Plan	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=64032356-95BD-5546-33B1-069A2BE852DA&siteName=tqcorp_06
Local	Tourism Queensland	2006	Bundaberg Destination Management Plan	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=63E9CAC0-C84A-1255-144A-297EF91EED78&siteName=tqcorp_06
Local	Tourism Queensland	2006	Destination Management Plan for Tourism in Central Queensland: Gladstone	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=423BC224-0E16-B1B6-04E8-D5D2EC22B780&siteName=tqcorp_06
Local	Tourism Queensland	2006	Mackay Region Destination Management Plan	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=63F8DA29-B0DE-798B-6FF0-18B93EB668A6&siteName=tqcorp_06
Local	Sarina Shire Council	2005	Sarina Shire Tourism Strategy	http://www.sarina.qld.gov.au/SarinaShireTourismStrategy2006-2011FINAL.pdf
Local	Tourism Queensland		Destination Management Plan for Tourism in Central Queensland: Capricorn	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=1FCC2536-F510-D81D-63A1-EA6220E1AA3C&siteName=tqcorp_06
Local	Tourism Queensland		Whitsundays Destination Management Plan	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=6405F530-0489-AF9E-BF64-8CE7F2A0A5FC&siteName=tqcorp_06
Local	Tourism Queensland	2004	Townsville Destination Management Plan	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=63F7FD08-DD96-1126-29AF-D46C8DEE5274&siteName=tqcorp_06
Local	Gulf Regional Planning Advisory Committee	2000	Gulf Regional Development Plan	http://www.localgovernment.qld.gov.au/docs/planning/projects/gulf/grdp_dec_2000.pdf
Local	Tourism Queensland	2005	Tropical North Queensland Destination Management Plan	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=63EDE283-D610-BD30-D3F6-B9CB6AF04B32&siteName=tqcorp_06
Local	Far North Queensland Planning Division, Local Government, Planning, Sport and Recreation	2000	FNQ 2010 Regional Plan—Tourism	http://www.localgovernment.qld.gov.au/?id=2185
Local	Far North Queensland Planning Division, Local Government, Planning, Sport and Recreation		FNQ 2010 Regional Plan—Tourism	FNQ2025@dlgsr.qld.gov.au
Local	Far North Queensland Planning Division, Local Government, Planning, Sport and Recreation		FNQ 2010 Regional Plan—Tourism— Technical Document	FNQ2025@dlgsr.qld.gov.au
Local	Tourism Queensland	2007	Cape York Peninsula & Torres Strait Tourism Development	http://www.tq.com.au/
Regional	Tourism Tropical North Queensland	2007	Tourism Research Needs Analysis	
Regional	Tourism Tropical North Queensland	2007	2007–2008 Business Plan	Annie Riddet, email. Annie.riddet@tnq.org.au
Regional	Wet Tropics Management Authority, Tourism Queensland	2005	Wet Tropics Management Plan 1998	http://www.legislation.qld.gov.au/LEGISLTN/CURRENT/W/WetTropMgmtP98.pdf
Regional	Wet Tropics Management Authority, Tourism Queensland	2000	Wet Tropics: Nature based Tourism Strategy	http://www.wettropics.gov.au/mwha/mwha_pdf/Strategies/naturebased_tourism.pdf
Local	Tourism Queensland		Destination Management Plan for Tourism in Queensland's Outback	http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=F488B1B2-D5B6-CDF7-3D58-7EB50F617C22&siteName=tqcorp_06
Regional	Great Barrier Reef Marine Park Authority	2004	Marine Tourism Contingency Plan	-

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Local	Great Barrier Reef Marine Park Authority	2005	Cairns Area Plan of Management	http://www.gbrmpa.gov.au/__data/assets/pdf_file/0016/7171/cairns_pom.pdf
Local	Great Barrier Reef Marine Park Authority	2004	Hinchinbrook Plan of Management 2004	http://www.gbrmpa.gov.au/__data/assets/pdf_file/0009/7875/hinchinbrook_pom.pdf
Local	Great Barrier Reef Marine Park Authority	1996	Shoalwater Bay (Dugong) Plan of Management	http://www.gbrmpa.gov.au/__data/assets/pdf_file/0008/7874/shoalwater_bay_pom.pdf
Local	Great Barrier Reef Marine Park Authority	2005	Whitsundays Plan of Management	http://www.gbrmpa.gov.au/__data/assets/pdf_file/0007/7873/whitsundays_pom.pdf
Regional	Tourism Tropical North Queensland	2008	Tourism Industry Research Needs Analysis—Great Barrier Reef Region	
State	South Australian Tourism Commission	2006	local Government's Engagement in Tourism	www.tourism.sa.gov.au
State	South Australian Tourism Commission	2006	Road Sign Guidelines: Guide to visitor and services road signs in South Australia	www.tourism.sa.gov.au
State	South Australian Tourism Commission & Department for Environment and Heritage	2003	Responsible Nature-based Tourism Strategy 2004–2009	www.tourism.sa.gov.au
State	South Australian Tourism Commission	2006	South Australia's Strategic Plan: Tourism Implementation Action Plan	www.tourism.sa.gov.au
State	South Australian Tourism Commission	2002	Sustainable Tourism Development: In Regional South Australia	www.tourism.sa.gov.au
State	South Australian Tourism Commission		Sustainable Tourism Package: the building blocks of sustainable tourism	www.tourism.sa.gov.au
State	South Australian Tourism Commission	2002	South Australian Tourism Plan 2003–2008	http://www.tourism.sa.gov.au/tourism/plan/TourismPlan2003_2008.pdf
State	South Australian Tourism Commission	2004	Wine tourism strategy 2004–2008	www.tourism.sa.gov.au
Local	South Australian Tourism Commission	2006	Limestone Coast Tourism: Marketing Plan 2006–2010	http://www.thelimestonecoast.com/webdata/resources/files/LCT_Strategic_Marketing_Plan_2006_-_2010.pdf
Local	South Australia Works	2006	South Australia Works in the Regions 2006–2009 Strategic Plan	http://www.saworks.sa.gov.au/files/links/9_SouthAustWorks_Pt2_limes.pdf
Local	Murraylands Regions Development Board	2003	Strategic Plan 2003–2008: Incorporating Economic Development and Employment Plans for the Murraylands Region of SA	http://www.murraylands.org.au/fileadmin/user_upload/docs/Murraylands_StratPlan_revised_June_2007.pdf
Regional	Alexandrina Council, District Council of Yankalilla, City of Onkaparinga, City of Victor Harbor, South Australian Tourism Commission	2007	Fleurieu Peninsula Region Integrated Strategic Tourism Plan 2007–2012	www.tourism.sa.gov.au
Regional	Fleurieu Peninsula Tourism, South Australia Tourism Commission	2007	Fleurieu Peninsula Region Integrated Strategic Tourism Plan Highlights Paper	Roz Becker, email roz@fptour.com.au www.tourism.sa.gov.au
Local	Victor Harbour City Council	2006	City of Victor Harbour: Strategic Directions 2006–2009	http://www.victor.sa.gov.au/webdata/resources/files/Strategic_Plan_2006-2009.pdf
Local	Adelaide City Council	2003	City Arts and Living Culture Strategy 2003–2007	http://www.adelaidecitycouncil.com/adccwr/publications/policies_strategies/cityarts_livingculture_strategy_2003-2007.pdf
Local	Holdfast Bay City Council		City of Holdfast Bay: Economic Development Strategy	http://www.holdfast.sa.gov.au/webdata/resources/files/Economic_Development_Strategy1.pdf

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Local	West Torrens City Council	2003	City of West Torrens: Economic Development Strategic Plan	http://www.wtcc.sa.gov.au/webdata/resources/files/2003_06_25_ed_strategic_plan1.pdf
Local	City of Port Adelaide Enfield	2006	Integrated Strategic Tourism Plan	http://www.portenf.sa.gov.au/webdata/resources/files/Integrated_Strategic_Tourism_Plan_2006-2010.pdf
Regional	Riverland Strategic Tourism Plan Steering Committee	2005	Riverland Integrated Strategic Tourism Strategy	Not Applicable: sourced by the Sustainable Tourism Cooperative Research Centre
Regional	The Barossa Council	2007	The Barossa Council's Strategic Plan 2007	http://www.barossa.sa.gov.au/webdata/resources/files/Strategic_Plan_-_final_draft_copy_07.pdf
Regional	Tourism Barossa	2007	Tourism Marketing Plan 2007–2008	http://www.barossa.com/webdata/resources/files/Tourism_Barossa_Marketing_Plan_07- 08.pdf
Regional	Clare and Gilbert Valleys Councils, The Barossa Council, Barossa & Light Regional Development Board Inc, Mid North Regional Development Board, Regional Council of Goyder, Light Regional Council, South Australian Tourism Commission	2005	Clare Valley and Barossa Tourism Regions Integrated Strategic Tourism Plan	www.tourism.sa.gov.au
Local	Adelaide Hills Council		Adelaide Hills Council Strategic management plan	http://www.ahc.sa.gov.au/webdata/resources/files/Strategic_Management_Plan.pdf
Local	Northern Areas Council	2007	Northern Areas Council Strategic Plan 2007–2010	http://www.nacouncil.sa.gov.au/webdata/resources/files/2007-2010_Strategic_Plan.pdf
Local	South Australian Tourist Commission	2007	Eyre Peninsula Marketing Plan	http://www.southaustralia.com/Eyre_MarketingPlan_2007_08.pdf
Local	Yorke Peninsula District Council	2005	Strategic and Corporate Plan 2005–2010	http://www.yorke.sa.gov.au/pdf/StrategicPlan2005-2010.pdf
Local	Kangaroo Island Development Board, Kangaroo Island Council, Tourism KI	2006	Kangaroo Island Strategic Tourism Plan	www.tourism.sa.gov.au
State	Tourism Western Australia	2005	The State Report: Destination Development Strategy, 2004–2014	http://www.tourism.wa.gov.au/Publications%20Library/Polices%20Plans%20and%20Strategies/Destination%20Development%20Strategies/Statewide%20Destination%20Development%20Strategy%202004-2014.pdf
State	Tourism Western Australia	2007	Strategic Plan 2008 to 2013: building for the future	http://www.tourism.wa.gov.au/Publications%20Library/Executive%20Services/Strategic%20Plan_2008.pdf
State	Tourism Western Australia		Tourism Planning Taskforce Report	http://www.tourism.wa.gov.au/Publications%20Library/Polices%20Plans%20and%20Strategies/Summary%20of%20Report.pdf
State	Tourism Western Australia		Making Tourism a First Resort: Workforce challenges	http://www.tourism.wa.gov.au/Publications%20Library/Polices%20Plans%20and%20Strategies/IDVS%20027%20Workforce%20Challenges%20Report.pdf
State	Tourism Western Australia	2005	Aboriginal Tourism Development Strategy for Western Australia	http://www.tourism.wa.gov.au/Media_Centre/Pages/Publications_Library.aspx?Category=Policies%20Plans%20and%20Strategies;main&p=2
State	Tourism Western Australia		An Arts & Cultural Tourism Strategy for Western Australia, 2004–2008	http://www.tourism.wa.gov.au/Media_Centre/Pages/Publications_Library.aspx?Category=Policies%20Plans%20and%20Strategies;main&p=3
State	Tourism Western Australia	2006	Strata Titled Tourist Accommodation Developments: Attributes of Success	http://www.tourism.wa.gov.au/Media_Centre/Pages/Publications_Library.aspx?Category=Policies%20Plans%20and%20Strategies;main&p=4
State	Tourism Western Australia	2006	A Heritage Tourism Strategy for Western Australia	http://www.tourism.wa.gov.au/Media_Centre/Pages/Publications_Library.aspx?Category=Policies%20Plans%20and%20Strategies;main&p=5
State	Tourism Western Australia	2006	Tourism Western Australia submission to state infrastructure strategy	http://www.tourism.wa.gov.au/Publications%20Library/Polices%20Plans%20and%20Strategies/State%20Infrastructure%20Strategy%20-%20final%20version%2028-021.pdf

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State	Tourism Western Australia	2004	A Nature Based Tourism Strategy for Western Australia	http://www.tourism.wa.gov.au/Publications%20Library/Growing%20Your%20Business/NBTS%20dec%2004.pdf
State	Forum advocating cultural and ecotourism	2003	FACET Forum advocating cultural and ecotourism Business plan	http://www.facet.asn.au/pdf/FACETBusinessPlan.pdf
Regional	Tourism Western Australia	2007	Australia's Coral Coast: Destination Development Strategy, 2007–2017 update	http://www.tourism.wa.gov.au/Media_Centre/Pages/Publications_Library.aspx?Category=Policies%20Plans%20and%20Strategies;main&p=5
Regional	Tourism Western Australia	2007	Australia's Coral Coast: Destination Development Strategy, 2007–2017	http://www.tourism.wa.gov.au/Publications%20Library/Polices%20Plans%20and%20Strategies/Destination%20Development%20Strategies/DDS%20Austrailas%20Coral%20Coast%202004-2014.pdf
Regional	Tourism Western Australia	2007	Australia's North West: Destination Development Strategy, 2007–2017 update	http://www.tourism.wa.gov.au/Media_Centre/Pages/Publications_Library.aspx?Category=Policies%20Plans%20and%20Strategies;main&p=6
Regional	Tourism Western Australia	2007	Australia's North West: Destination Development Strategy, 2007–2017	http://www.tourism.wa.gov.au/Publications%20Library/Polices%20Plans%20and%20Strategies/Destination%20Development%20Strategies/DDS%20Australias%20North%20West%202004-2014.pdf
Regional	Tourism Western Australia	2007	Australia's South West: Destination Development Strategy, 2007–2017 Update	http://www.tourism.wa.gov.au/Media_Centre/Pages/Publications_Library.aspx?Category=Policies%20Plans%20and%20Strategies;main&p=7
Regional	Tourism Western Australia	2007	Australia's South West: Destination Development Strategy, 2007–2017	http://www.tourism.wa.gov.au/Publications%20Library/Polices%20Plans%20and%20Strategies/Destination%20Development%20Strategies/DDS%20Australias%20South%20West%202004-2014.pdf
Local	City of Albany Council	2005	City of Albany Tourism Strategy	http://svc010.wic466d.server-web.com/images/albany/CityofAlbanyTourismStrategy.pdf
Regional	Tourism Western Australia	2004	Experience Perth: Destination Development Strategy, 2004–2014 Update	http://www.tourism.wa.gov.au/Media_Centre/Pages/Publications_Library.aspx?Category=Policies%20Plans%20and%20Strategies;main&p=8
Regional	Tourism Western Australia	2005	Experience Perth: Destination Development Strategy, 2004–2014	http://www.tourism.wa.gov.au/Publications%20Library/Polices%20Plans%20and%20Strategies/Destination%20Development%20Strategies/DDS%20Experience%20Perth%202004-2014.pdf
Local	Perth City Council		Strategic Direction: City of Perth	
Local	Mandurah City Council	2007	local Tourism Planning Strategy Draft	http://www.mandurah.wa.gov.au/council/minutes/forms/planning/19_outline_development_plans.pdf
Local	Chittering Shire Council	2002	Shire of Chittering Economic Development Strategy	http://www.google.com.au/search?sourceid=navclient&ie=UTF-8&rlz=1T4ADBF_enAU232AU232&q=shire+of+chittering+economic+development+strategy
Local	City of Fremantle Council		City of Fremantle: Cultural Policy and Plan	http://www.fremantle.wa.gov.au/council/resource/cultural_plan.pdf
Local	Kalamunda Shire Council	2006	Shire of Kalamunda: Cultural Plan 2006	http://www.kalamunda.wa.gov.au/NR/rdonlyres/2F496AEF-341A-41C2-AAFD-2D11CCEBE543/2061/SKAL237587CulturalPlanLR.pdf
Local	Wannaroo City Council	2005	Smart Growth Strategy	http://www.wanneroo.wa.gov.au/upload/Wanneroo-Internet/7F44559CA7D24CF0ADBD21BBA000D0CB.pdf
Local	Wannaroo City Council	2003	Tourism Wannaroo 2004–2008	Contact: Amanda Murphy, email Amanda.Murphy@wanneroo.wa.gov.au
Local	Joondalup City Council	2006	Tourism Development Plan	http://www.joondalup.wa.gov.au/cms/templates/coj2_council_grp.asp?id=115
Local	The Shire of Serpentine Jarrahdale Council	2003	Tourism Strategy 2003–2008	http://www.sjshire.wa.gov.au/uploaded/pdf/sjtourismstrategy.pdf
Regional	Augusta Margaret River Tourism Association	2008	Strategic Marketing Plan	Jasmine Meagher, email. jasmine@margaretriver.com

Level	Organisation	Year	Document	Website or contact
Regional	Tourism Western Australia	2007	Australia's Golden Outback: Destination Development Strategy, 2007–2017 update	http://www.tourism.wa.gov.au/Media_Centre/Pages/Publications_Library.aspx?Category=Policies%20Plans%20and%20Strategies;main&p=5
Regional	Tourism Western Australia	2007	Australia's Golden Outback: Destination Development Strategy, 2007–2017	http://www.tourism.wa.gov.au/Publications%20Library/Polices%20Plans%20and%20Strategies/Destination%20Development%20Strategies/DDS%20Australias%20Golden%20Outback%202004-2014.pdf
State	Tourism Tasmania	2006	Tourism Promotion Plan	http://www.tpptasmania.com/pdf/TPP_launchedplan.pdf
State	Tourism Tasmania		New Directions for Our Island: Tourism Tasmania 3 year Business Strategy	http://www.tourismtasmania.com.au/pdf/2006_1115_Our_Island_Web.pdf
State	Tourism Tasmania	2007	A New Marketing Approach for Tasmania	http://www.tourismtasmania.com.au/pdf/2007_tasind_regionalmarketingstrategy.pdf
State	Tourism Tasmania	2007	Tourism 21: Strategic Business Plan 2007–2010	http://www.tourismtasmania.com.au/pdf/2007_tasind_t21dec.pdf
State	Department of Premier and Cabinet, Tasmania	2007	Aboriginal Tourism Development Plan for Tasmania	http://www.dpac.tas.gov.au/divisions/oaa/documents/ATDP_Web_low_res.pdf
State	Tourism Tasmania	2002	The Tasmanian Experience: creating unforgettable natural experiences	http://www.tourismtasmania.com.au/pdf/tasmanianexperiencestrat_web.pdf
Local	Hobart City Council	2002	Hobart City Council Arts and Cultural Strategy	http://www.hobartcity.com.au/HCCWR/_assets/main/LIB60034/ARTS_AND_CULTURAL_STRATEGY.PDF
Local	Sorell Council	2008	Sorell Council: Community Strategic Plan 2008–2013	http://www.sorell.tas.gov.au/webdata/resources/files/SC_Strategic_Plan.pdf
Local	Derwent Valley Council	2005	Derwent Valley Council Strategic Plan 2005–2010	http://www.derwentvalley.tas.gov.au/webdata/resources/files/STRATEGIC_PLAN_2005_-_2010.pdf
Local	Central Coast Council	2004	Central Coast Economic Development Plan 2004–2009	http://www.centralcoast.tas.gov.au/webdata/resources/files/EconomicDevelopmentPlan20042009.pdf
Local	Launceston City Council, Tourism Tasmania, Northern Tasmania Development and SCA Marketing and Red Inca	2005	Launceston Tourism Plan 2005–2010	http://www.launceston.tas.gov.au/upload/2802/tourismplan.pdf
Regional	Northern Tasmania Development	2007	Northern Tasmania Development 2007–2008 Annual Action Plan	http://www.northerntasmania.org.au/documents/2007_08_corporate_action_plan.pdf
Regional	Northern Tasmania Development	2007	Northern Tasmania Development Strategic Plan	http://www.northerntasmania.org.au/documents/strategic_plan.pdf
Regional	Cradle Coast Authority	2002	Cradle Coast Authority: Regional Tourism Development Report	http://www.cradlecoast.com/Files/00447_AnnualReport2002-2003AppA.pdf
Regional	Cradle Coast Authority	2003	Cradle Coast Tourism Development Plan Summary	http://www.cradlecoast.com/Files/00240_IntroTourismDevelopmentPlan.pdf
Regional	Cradle Coast Authority	2003	Cradle Coast Tourism Development Plan Final Report Part 1	http://www.cradlecoast.com/Files/00355_TDPPart1.pdf
Regional	Cradle Coast Authority	2003	Cradle Coast Tourism Development Plan Final Report Part 2	http://www.cradlecoast.com/Files/00355_TDPPart2.pdf
Regional	Inland Fisheries Service	2007	Tasmanian Inland Recreational Fishery Management Plan 2007–2017 Draft	http://www.ifs.tas.gov.au/ifs/newsitems/specialfeature/INLFIS%20ann%20rpt%20pgs.pdf
State	Northern Territory Tourist Commission	2003	Northern Territory Tourism Strategic Plan 2003–2007	Valerie Smith, Email. Valerie.smith@nt.gov.au
State	Northern Territory Tourist Commission	2004	Northern Territory Tourism Strategic Plan 2003–2007: Update January 2004.	Valerie Smith, Email. Valerie.smith@nt.gov.au

Level	Organisation	Year	Document	Website or contact
State	Northern Territory Tourist Commission	2004	Northern Territory Indigenous Tourism Strategy	www.tourismnt.com.au/nt/system/galleries/download/Industry/DD_Strategy_Indigenous_Tourism_2004_20041110.pdf
State	Northern Territory Tourist Commission	2004	Northern Territory Aviation Strategy 2004–2006	http://www.tourismnt.com.au/nt/system/galleries/download/Industry/SBD_Strategy_Aviation_20040227.pdf
State	Tourism Northern Territory	2006	Northern Territory Backpacker Development Plan	http://www.tourismnt.com.au/nt/system/galleries/download/Industry/SBD_Backpacker_Development_Plan.pdf
State	Tourism Northern Territory	2007	Update—Northern Territory Backpacker Development Plan	http://www.tourismnt.com.au/nt/system/galleries/download/Industry/Backpacker_Development_Plan_UPDATE_-_Jan_2007.pdf
State	Tourism Northern Territory	2007	Destination Development Blue Print 2007–2009	http://www.tourismnt.com.au/nt/system/galleries/download/Industry/Growing_The_NT.pdf
State	Tourism Northern Territory	2007	China Market Development Plan 2008 to 2010	http://www.tourismnt.com.au/nt/system/galleries/download/NTTC_Research/China_Mkt_Devt_Plan_Nov07.pdf
State	Northern Territory Tourist Commission	2008	Five Year Tourism Strategic Plan: A plan to guide the direction and success of the Northern Territory tourism industry 2008 to 2012	Valerie Smith, Email. Valerie.smith@nt.gov.au
State	Northern Territory Tourist Commission	2008	Five Year Tourism Strategic Plan: Summary	Valerie Smith, Email. Valerie.smith@nt.gov.au
Local	Tourism Northern Territory	2004	Larapinta Trail Management Strategy	http://www.nt.gov.au/nreta/parks/manage/plans/pdf/lara_man_strategy.pdf
Regional	Kakadu national Park		Walking to the future ... Together: A shared vision for tourism in Kakadu national Park	http://www.environment.gov.au/parks/publications/kakadu/tourism-vision/pubs/report.pdf
Local	Mataranka Community Government Council	2004	Business Plan 2004–2005	http://www.mataranka.nt.gov.au/home/about_us/business_plansb
Local	Mataranka Community Government Council	2007	Business Plan 2007–2010	http://www.mataranka.nt.gov.au/home/about_us/business_plansb
Regional	national Centre for Studies in Travel and Tourism for Central Australian Tourism Industry Association, Alice Springs Town Council, Chamber of Commerce Northern Territory, Department of Natural Resources, Environment and the Arts, Department of the Chief Minister, Tourism NT Prepared by the national Centre for Studies in Travel and Tourism	2005	Strengthening the position of Alice Springs Tourism: Taking the Next Steps	http://www.tourismnt.com.au/nt/system/galleries/download/Industry/ASP_Action_Plan_Original_20051222.pdf
Regional	national Centre for Studies in Travel and Tourism for Central Australian Tourism Industry Association, Alice Springs Town Council, Chamber of Commerce Northern Territory, Department of Natural Resources, Environment and the Arts, Department of the Chief Minister, Tourism NT	2007	Taking the Next Steps: 2007 update	http://www.tourismnt.com.au/nt/system/galleries/download/Industry/action_plan_alice_springs_2007.pdf
Regional	National Centre for Studies in Travel and Tourism	2006	Tourism Infrastructure Framework	http://www.tourismnt.com.au/nt/system/galleries/download/Industry/DD_Project_ASP_Framework.pdf
Regional	Tourism Northern Territory		The value and nature of heritage tourism in Alice Springs	http://www.tourismnt.com.au/nt/system/galleries/download/Industry/DD_ValueNature_HeritageTourism_AliceSprings.pdf
State	EnvironmentACT	2000	Nature Based Tourism Strategy for the Australian Capital Territory	http://www.tams.act.gov.au/__data/assets/pdf_file/0015/13029/nbtstrategy.pdf

Level	Organisation	Year	Document	Website or contact
State	National Capital Authority	2002	Consolidated national Capital Plan: Incorporating Amendments	http://downloads.nationalcapital.gov.au/plan/ncp/feb2002_ncp.pdf
State	ACT & Region Chamber of Commerce and Industry	2006	Canberra's tourism industry	http://www.ticact.org.au/documents/Lobby_Policy/Position%20Paper%20-%20September%202006.pdf
State	National Capital Authority	2003	Communications Strategy 2003	http://downloads.nationalcapital.gov.au/corporate/publications/commstrat_2003.pdf
State	National Capital Authority	2003	Events in the national Capital	http://downloads.nationalcapital.gov.au/corporate/publications/EventGuidelines_03.pdf
State	Australian Capital Tourism	2005	Seeds for Success	Justin Lalor
State	Australian Capital Tourism	2005	Our Industry—Our Future	Justin Lalor

Appendix C: National Tourism Strategies

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Sport and Tourism Division 2000 **Towards a national Sports Tourism Strategy** http://catalogue.ausport.gov.au/fulltext/2000/feddep/SportTourismStrategy.pdf Key Issues: 1. Changing consumer behaviour 2. Sport & Tourism need to work together 3. Need to encourage participation & maximise on international media attention 4. Ensure maximum & efficient use of existing sport/tourism infrastructure 5. Government regulations 6. Lack of industry coordination, communication & strategy 7. Lack of research, modelling & data 8. Lack of affordable accommodation & transport 9. Sport tourism is a high risk sector 10. Education & training 11. Accreditation 12. Develop regional sporting hubs 13. Establish a national sport tourism unit	**Australia's Climate** Well suited to outdoor activities. Opposite seasons to the Northern hemisphere provides opportunities for pre-season training camps. **The Sydney 2000 Olympics** Provided Australia with expertise in a range of sports tourism related fields and world class sporting venues. **Changing consumer behaviour and growth in tourism** There is more opportunity for sport participation due to changes in leisure patterns, consumer spending preferences, ageing populations, increased disposable income, increased awareness of the benefits of physical activity, more leisure time, earlier retirement, improved infrastructure/transport. **Australia's sports tourism culture and expertise** A sporting nation with a strong Sports profile. It has a diverse range of sporting activities, expertise in sports science and medicine and an international reputation as a sporting nation and tourism destination. Need to address barriers to participation in some sectors of the population and encourage and support volunteers. **Increased media coverage and awareness of sector** Greater international media attention on sport and recreation as a result of changing technology allowing live sports coverage and dedicated sport channels. There is a need to further develop the industry's profile. Marketing opportunities from	**Government Regulation** Organisers deal with numerous levels of government that have different requirements. Some states/territories have developed information kits to address the issue, but the Commonwealth could assist by a mechanism to help deal with complex regulatory requirements. **Little coordination, communication and strategy** Occurs at and across national/state/regional levels and is particularly prevalent in development. Funding is not always identifiable, accessible or equitable. Need a coordinated economic approach to development and allocating use of facilitates. Need to encourage public/private sector partnerships and establish links between sport and tourism to raise awareness/increase benefits. Need a key stakeholder database to build networks, clarify roles and encourage coordinated event calendars. **Lack of research, modelling and data** Need to develop sound research base. Current research focuses on individual events and does not take a holistic view to the sports tourism market. Need to clearly define sports tourism, coordinate development of research agenda and conduct accurate market analysis for existing and potential markets. Undertake post event research. Lack of research in areas of economic and social impacts of events. The evaluation/valuation of events needs to be affordable, standardised, rigorous and comprehensive, particularly for publicly funded events.	**Education and training** Need to identify and address training needs in sports tourism sector. Basic business, event and management skills are required. While training is available, it fails to meet industry needs or is not affordable/accessible, particularly to volunteers. **Accreditation** This should be further developed to enhance professional development focused on employees, trainees, management and volunteers. Tourism organisations also need a greater awareness of sports tourism opportunities to enable them to maximise the tourism potential of sporting events and activities. **Develop regional Sporting 'hubs'** The development of regional sporting 'hubs' for particular sports can help reduce the risk of constructing sports specific facilities which are economically unsustainable. Promote the development of sports tourism in regional areas and address impediments to growth. **Establish a national sport tourism unit** This unit would assist in the development of sports tourism, improve information dissemination through website, facilitate access to research findings and resources, improve lines of communication between stakeholders, encourage cross-agency linkages for marketing, develop region specific databases for event managers, encourage sharing of information and expertise in regional areas, target niche events appropriate to area and facilities, address issues of transport, sponsorship

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Sport and Tourism Division 2000 **Towards a national Sports Tourism Strategy** http://catalogue.ausport.gov.au/fulltext/2000/feddep/SportTourismStrategy.pdf	events can be substantial. **Sport/tourism infrastructure** Access to quality sports facilities and well developed tourism infrastructure. There is need to undertake an accommodation, infrastructure and resources audit (by region, market, sector) to identify the range and accessibility of sport and tourism products available. Identify what facilities could be used or upgraded. Encourage capacity utilisation of existing facilities, examine cost effectiveness of developing new facilities in regional areas and consider multi-use facilities.	**Lack of affordable accommodation and transport** Particularly in regional areas. Problematic as events require large numbers of people to be moved and accommodated. Generally transportation is expensive and there is a lack of capacity. This can be elevated through ongoing reforms and deregulation in the transport sector, especially domestic aviation. **Sport tourism is a high risk sector** Due to possible injury to participants resulting in exposure to litigation. This can be overcome by introducing training and accreditation for instructors.	and media, encourage coordination to avoid duplication, encourage rotation of national events throughout all of Australia. Identify and pursue suitable sports tourism opportunities and encourage development of events based tourism strategies.
Australian Tourist Commission (ATC) February, 2001 **Olympic Games Tourism Strategy**	Increased the tourism markets awareness of Australia as a destination, increased visitor numbers, injected billions into the economy and created jobs.	Required government policy support and funding to implement.	Extensive media campaign to maximise marketing impact of the games and used to raise awareness about ATC and the importance of inbound tourism.
Tourism Australia 2002 **China Strategy and Actions** http://www.tourism.australia.com/_content/Research/China_study_101002.pdf Key Issues: 1. Little awareness of Australia in the Chinese market 2. Australia is seen as expensive or difficult to access 3. Need to educate the Chinese market about Australia	**Australia has many assets:** ▪ escape the pressures of life, find peace and quiet, have a casual relaxed holiday ▪ good weather, fresh air, unpolluted, great beaches, natural wonders, un-spoilt scenery, a place of natural beauty and unusual wildlife ▪ Interesting activities and unique adventures/experiences and an experience of a lifetime ▪ sophisticated and becoming increasingly popular ▪ good for honeymoon and suitable for young people, families and older people ▪ can get to know and learn about local Australians ▪ range of accommodation, well known international brands and good service ▪ politically stable	**Little awareness of Australia in the Chinese market** Chinese potential travellers generally have little experience of overseas travel and little knowledge of specific overseas destinations, including Australia. **Expensive or difficult to access destination** Time and cost incurred in travel, seen to be expensive, language problems.	**Educate the Chinese market about Australia** Need to increase Chinese traveller awareness of Australia as a holiday destination and emphasise its relative accessibility. **Australia is well marketed and sellers well educated** Destination education occurs via Aussie Specialist program, in-market missions and famils.
Australian Government 2003 **Tourism Green Paper**	**Diversification and niche market development** Diversify Australia from a travel destination to a lifetime experience by increasing the number of Australian	**Transportation** Issues of congestion, lack of dispersal and intermodal links (i.e. links between various modes of transport). Several overseas airlines withdrawn or reduced services to	**Sustainable tourism** Nature based businesses are dynamic and provide regional economic development. Protection and conservation is essential for the tourism industry's future.

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
http://www.ret.gov.au/Documents/TourismGreenPaper20031107160414.pdf **Key Issues** 1. Diversification & niche market development 2. Focus on high yield 3. Marketing—need a brand 4. Increase tourism in regional areas 5. Ensure product quality 6. Develop Transportation 7. Increase productivity through HR & innovation 8. Increase planning & investment in infrastructure 9. External threats with little risk management 10. Weak research capabilities 11. Sustainable tourism 12. Development through cooperation & coordination 13. Working Holiday Makers 14. Consumer Awareness 15. Education & Training	tourism products through niche market development. **Focus on high yield** To enhance business profitability and better position the industry against volatility and global uncertainty. For example focus on high yield events market. **Marketing** Need for effective international and domestic tourism marketing and promotion by branding Australia. Expand Australia's tourism export markets and encourage domestic travel. **Increase tourism in regional areas** Increase domestic and regional tourism activity. In regional areas tourism offers opportunities for growth, investment in new facilities, upgrading of existing facilities, stems economic decline due to structural change and mitigates population outflows to larger urban areas. Grow regional economies through tourism. **Product Quality** Need to raise the standard of tourism products and businesses to help ensure the Australian tourism industry grows sustainably.	regional airports. Need to address the impediments to a better road system. A coordinated national approach to tourism signage would be of considerable benefit. **Increase productivity through HR and innovation** Labour productivity in the tourism sector is relatively low, a result of workplace organisation and flexibility. Non-technological innovation in tourism. There are gains to be realised from new technology. Need to develop innovative technical solutions. **Planning and investment in infrastructure** Need tourism input into planning to address issues such as congestion and develop new areas for visitation. There is an under investment issue and a lack of infrastructure is a barrier to developing new sectors i.e. cruise. Need to improve asset utilisation. **External threats with little risk management** International terrorism and the degradation of the natural environment. Few businesses have formal or structured approaches to risk management. Need to develop the sectors capacity to respond to negative events and lower the tourism sectors risk profile. **Research** Need to increase tourism information through developing timely and accurate research, forecasts and innovation capabilities. Incorporate tourism research responsibilities into Australian Tourism. Weak dissemination programs of research	Encourage and support business practices that are environmentally and culturally sustainable. **Development through cooperation and coordination** Need to grow profitability and size of the tourism sector by improving planning and coordination of national tourism development. Need a whole of government approach to reduce issues of joint/overlapping responsibility. Need cooperation between federal, state/territory and local governments to effectively address issues. Explore the integration of Australian and New Zealand tourism markets. Need to rejoin the United Nations World Tourism Organization. **Working holiday makers** Need to sponsor skilled immigrants to overcome skills gaps. Working Holiday visas can address labour/skills shortages particularly in regional and seasonal work. **Consumer awareness** Lack of consumer awareness concerning tourism and environmental issues. Need public and management education on tourism access to protected areas, Indigenous tourism and general tourism awareness. **Education and Training** Skills shortages or gaps increasing. Hidden shortages/gaps in certain skilled categories. Need greater portability of educational qualifications. Increase emphasis on formal training in addition to on-the-job training. Promote training

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Australian Government 2003 **Tourism Green Paper (cont.)**		agencies. Lack of understanding within the industry about the available information and research and how it can be applied. Also need to understand how the internet is impacting on global supply chains.	opportunities for mature age people. regional tourism businesses require different skill sets to those in major centres. There are gaps in the availability and accessibility of tourism training courses in rural/remote areas.
Australian Government 2003 **Tourism White Paper** http://www.industry.gov.au Key issues: 1. Sustainable tourism economic development 2. Diversification & niche market development 3. Develop nature based, ecotourism & indigenous tourism 4. Major events 5. Education & training 6. Transportation 7. Weak Domestic tourism 8. External threats 9. Labour & skills shortages 10. Research 11. Increase collaboration 12. Infrastructure & business quality 13. Aim marketing at growing high-yield tourism Australian Government	**Sustainable tourism economic development** Tourism is a way to develop economies. It provides economic independence, diversifies economies, boosts income, creates jobs and provides flow-on benefits to supporting industries in a region. **Diversification and niche market development** Australia has a wide range of climates and environments which offers a diversity of tourism experiences. Need to diversify to capture new opportunities. For example, Australia has world-class education facilities and is well-placed to attract more international study tourism. **Nature based, ecotourism and Indigenous tourism** In particular there is a need to develop nature based, ecotourism and Indigenous tourism. Research revealed the industry is only meeting half the market demand for Indigenous tourism experiences, yet they are a unique tourism product that could be developed to attract tourists. Australia should also aspire to set benchmarks for environmentally sustainable tourism. **Major events** Seek to attract major events. Staging major events is a way to help the tourism industry recover from downturns as well as to address seasonal fluctuations. Major events can provide catalysts to kick start tourism activity which would otherwise take much longer to recover.	**Transportation** Need to increase access by developing aviation and road signage and increase efficiency in customs processing. **Weak domestic tourism** Need to boost domestic tourism and promote it as a way to increase regional sustainability. **External threats** These include terrorism, SARs, international security and safety of international tourists. The industry is currently unable to maintain sustained growth and respond to major incidents. There is a need to develop the industry's risk management as past impacts have revealed how vulnerable the industry is to external shocks **Labour and skills shortages** Tourism offers a wide range of job opportunities and flexibility. In Australia it is characterised by a high degree of diversity in skills, training needed and hours worked. The occupational profile of jobs in the tourism industry consists of a higher proportion of part-time, casual and seasonal jobs, and a higher rate of female participation than in the overall labour force. Australia has a key advantage in tourism labour as many Australians possess linguistic and cultural skills. The tourism industry is dominated by SMEs and characterised by seasonality, especially in alpine or beach resorts. Greater business stability can provide a	**Research** Increase tourism research and statistics and its dissemination. ABS has produced the Australian Tourism Satellite Account which provides the first real measure of the economic contribution of tourism to Australia. Continue to support the research efforts of the Cooperative Research Centre for Sustainable Tourism to increase the range of research, analysis, data and development of a sustainable tourism sector. **Increase collaboration** Increase communication and closer formal working relationships between all major stakeholders. Leverage with other industries to promote the benefits of visiting and exploring Australia. Tourism deepens Australia's relations with other nations, increases cross-cultural experiences and helps to create awareness of indigenous communities. Increase bilateral collaboration through joint marketing and other initiatives as these are mutually beneficial to Australia and partner nations i.e. work closer with New Zealand through collaborative marketing opportunities. Join the UNWTO as membership will offer Australia the opportunity to become more involved in the sustainable development of tourism, which is a significant issue in the Asia-Pacific Region. **Infrastructure and business quality** Need to increase infrastructure development and attract investment in

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
2003 **Tourism White Paper** http://www.industry.gov.au	**Education and training** Need to increase training and skills development. Need to increase accreditation and romote employment and training to young and Indigenous Australians.	more positive environment for long term investment in labour force development. Development of a skilled workforce, capable of sustaining high levels of service, is critical to this labour intensive industry. To overcome seasonality there is a need to develop the Working holiday maker scheme.	Australia's infrastructure. Need to improve business quality and ensure the quality of the tourism product. **Aim marketing at growing high-yield tourism** Brand Australia and lift its profile. Aim to attract high-yield tourism markets.
OCDE July, 2003 **National Tourism Policy Review of Australia** http://www.ret.gov.au/General/Tourism-BMET/Pages/nationalTourismInvestmentStrategy.aspx Key issues: 1. Australia's strengths 2. Tourism growth 3. Accreditation development 4. Risk management & contingency planning 5. Approved destination status 6. Transportation 7. Marketing 8. Diversification & niche market development 9. Education 10. Flexible tourism labour market 11. Government leadership 12. Lack of cooperation & collaboration 13. Fragmentation of the industry 14. Research & statistics 15. Changing consumer behaviour & distribution systems	**Australia's strengths** Strong growing economy with low inflation and interest rates. It has an efficient government and competitive business sectors. It has distinctive cultural features that cannot be duplicated i.e. Indigenous culture. **Tourism growth** Has quickly developed from a small sector to a major industry. A modest increase in tourism growth can deliver significant economic benefits. An important economic driver in local communities with many local governments funding promotion and marketing and employing tourism officers. **Accreditation development** Development of the national Accreditation framework and a code of conduct. Organisation of a national tourism accreditation forum to enable stakeholders to exchange information on existing and developing programs and to understand the national tourism accreditation market. **Risk management and contingency**	**Lack of cooperation and collaboration** A lack of clarity on responsibilities between different levels of government and the private sector. Need to take whole of government approach and increase cooperation amongst the tiers of government. Encourage stakeholders to share information and cooperate in developing a quality product and promoting the industry. Need cooperation between government, industry and communities to identify new opportunities. Incorporate other government portfolios in tourism policy. **Fragmentation of the industry** Tourism in Australia is typically fragmented due to many being SMEs. Fragmentation makes it difficult to raise a collective voice when dealing with government. **Research and statistics** Lack of awareness in the tourism industry of access to information and research, weak dissemination programs of research agencies, lack of understanding within industry about the available information and how it can be applied. Information on visa and travel issues that affect tourism not always timely. Need to expand tourism research and innovation that focuses on sustainability, quality and collaboration. STCRC needs to better establish its reputation as a world leader in research,	**Increase investment in infrastructure** There is volatility in tourism investment (particularly in accommodation). Pressure on tourism infrastructure in high visitation destinations is an issue for economic sustainability of tourism. Lack of appropriate infrastructure to meet local community and tourism needs can diminish the value of the tourism experience and undermine the industry's long term viability. Need to develop an agreed framework for the national coordination of tourism infrastructure development. Joint venture opportunities and international contacts to potential overseas investors. Strengthen bilateral tourism relationship through free trade agreements with countries such as Thailand, Singapore and the USA. Further liberalisation in the services sector through the GATs process which will help to develop tourism infrastructure. Need to improve tourism asset utilisation and coordination across public and private sectors. Need to find ways to facilitate the provision of appropriate tourism infrastructure. Address impediments to tourism development and pursue export and commercial collaboration opportunities for the Australian tourism industry. **Sustainability**

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16. Low profitability & returns on investment 17. Marketing, demand & supply mismatch 18. External factors 19. Labour & skills shortages 20. Need to increase investment in infrastructure 21. Sustainability 22. Industry quality 23. Increase international visitor dispersal 24. Increase community awareness 25. Join the UNWTO	**planning** Ongoing global uncertainty and safety concerns. Australia has developed the national Tourism Issues Response Plan that helps it to respond to major unanticipated shocks or events. Need to raise consumer awareness of the safety and security measures in place in Australia and promote them to overcome tourist security concerns. **Approved Destination Status (ADS)** Australia has ADS group travel arrangements with China. **Transportation** Good air services policy with active liberalisation. A challenge will be to increase availability of adequate and sustainable air services. **Marketing** There are international and domestic cooperative marketing strategies and opportunities. **Diversification and niche market development** Need to diversify the tourism product by ensuring adequate opportunities for the development of new experiences to ensure long term growth i.e. cultural tourism niche market, ecotourism. **Education** Education initiatives will assist the tourism sector by increasing the attractiveness of the destination to overseas students as a tourism educator and increase promotion of Australia's education and training opportunities more generally to other countries. **Flexible tourism labour market**	education and training to better attract students to Australia's tourism education facilities as a result. **Changing consumer behaviour and distribution systems** Weak domestic tourism. Consumers booking closer to departure, shorter holidays and visiting destinations closer to home. Distribution systems are changing due to increased use of internet. Need to adapt business planning methods to allow sector to respond to trends. **Marketing, demand and supply mismatch** Targeting high yield to increase expenditure rather than visitor numbers. However the industry's product quality is declining. Need to align marketing and product. A key factor is Australia's ability to provide a quality tourism product while maintaining reasonable value for money. **External factors** These include increased globalisation and international competition. Weak international economic backdrop. **Low profitability and returns on investment** Relatively low profitability and modest returns on tourism investments. Data shows that the operating profit margin in the tourism sector is significantly below that of the entire economy's profitability. Particular areas of tourism have shown relatively poor profitability i.e. travel agencies, tour operators and accommodation. There is a need to improve and maintain profitability. **Labour and skills shortages** Overall tourism employment growth is	Sustainable tourism is an important factor in policy making. Need to manage tourism and other impacts on Australia's natural and cultural environment to avoid decline in the tourism experience for visitors. Need to facilitate the environmental, social and economic sustainability of the tourism sector. Need to improve planning and coordination of national tourism development and facilitate the development and growth of sustainable air, sea and land transport services and key tourism infrastructure. Sustainable development of tourism including environmental sustainability. Need to promote sustainable business practices and set global standards for ecologically sustainable business practices and environmental management. **Industry quality** **Increase international visitor dispersal** **Increase community awareness** **Join the World Tourism Organisation** Membership in the UNWTO will increase research capability and provide opportunities to exchange views on international tourism policy development and trends and pursue commercial collaboration opportunities for the Australian industry.

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	Australia has labour market reforms aimed at improving labour market flexibility and labour market agreements to facilitate temporary employment visas. **Government Leadership** DITR has worked to increase collaboration and industry partnerships and linkages. There is significant government involvement across all three levels of government.	masking skills shortages and gaps which Potentially capping future tourism growth and is particularly risky given the targeting of high yield and niche markets that require high skill levels. Gaps likely in management and business skills for SMEs, cross cultural or language skills and IT skills. The challenge is for education providers to deliver the required skills. Need to relax visa policies to import tourism labour and identify opportunities to export tourism expertise and intellectual property.	
Tourism Events Australia 2004 **Tourism Events Australia Discussion Paper** Key Issues: 1. Australia successful at attracting major events 2. Events section a part of Tourism Australia 3. Poor perception as a business events destination 4. Limited research into business & major events 5. Competitive industry 6. Lack of events strategy 7. Limited funding 8. Major security issues 9. Improve government coordination 10. Encourage dispersal 11. Events calendar 12. Brand positioning	**Australia successful at attracting major events** Australia has been successful in attracting a range of major professional, sporting, arts and cultural events. **Events section a part of Tourism Australia** Until TEA business and major events had not been included in ATC/TAs charter. **Lack of events strategy** No long term strategy and limited national coordination. There is an opportunity to create one to develop the sector.	**Poor perception as a business events destination** Not perceived as an obvious destination for all types of business events i.e. corporate meetings. **Limited research into business and major events** Limited research targeted at business and major events. Difficult to measure the size and value of the major events sector due to definitional problems, some overlap with business events and the lack of a consistently applied national economic measurement model. Due in part to the political nature of securing events by individual states, there is a lack of risk and reward profiles for event owners to assess their return on investment. Need to improve the quality and relevance of research for the events sector. **Competitive industry** The international business events market is competitive with a large number of players in the industry. **Limited funding** Industry associations have limited funding to support new initiatives. Improved funding is required.	**Improve government coordination** For strategies to work there is a need for collaboration and cooperation across the industry, state and federal government bodies. There is a need to improve coordination that aims to secure more business for Australia, strengthen linkages with other federal departments and with the Australian and global business community in order to identify new funding opportunities and enhance bids and event delivery. Need a whole of government approach. **Encourage dispersal** Explore ways to encourage dispersal of the benefits of business events to regional Australia. **Events Calendar** Create a national events calendar that identifies gaps, avoids clashes and addresses seasonality. Establish and maintain a national web-based register of events. **Brand positioning** Reposition the brand and profile of

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		Major security issues	Australia to support the positioning of Australia as an events destination. Adopt a national coordinated approach to the strategy, marketing and promotion of both business and major events.
Restaurant and Caterers Australia 2004 **Complete Policy Document** http://www.restaurantcater.asn.au/rc/content.aspx?id=10 Key Issues: 1. Growth in entry level training 2. Workplace relations—need national consistency & better balance 3. Employment, education & training 4. Taxation treatment of business meals 5. GST Simplification 6. Superannuation 7. Domestic tourism 8. Food Safety 9. Myriad of awards & lack of consistent definition, application of respective provisions & clarity 10. Smoking 11. Licensing/Accreditation/Certification 12. Quarantine 13. The 24/7 nature of the industry—reform penalty rates	**Growth in entry level training opportunities in the restaurant and catering industry**	***Workplace Relations—need national consistency and better balance*** Workers compensation and workplace relations safety laws need to address issue of unfair dismissal, simplify legislation, take into account SME nature of the industry and provide a better balance between employers/employees rights. Extend probation times. **Employment Education & Training** Properly resource an education campaign to encourage supervisors/operators and handlers to undertake food safety training. Enhance the level of engagement of individual businesses and the training system. Training needs to be more accessible. Take a customer focus for the promotion of training options, the consultation of operators and the language used by the training system. ***Taxation treatment of business meals*** ***GST simplification*** ***Superannuation*** ***Domestic tourism*** ***Food safety*** **Myriad of awards and lack of consistent**	**Smoking** That the Association encourages all Governments to ban smoking from all enclosed public places without exception where food and drink are consumed, and where people work. ***Licensing/Accreditation/Certification*** That the association have a policy in support of a competency based occupational licensing scheme. ***Quarantine*** That all imported produce be subject to Australian standards testing, to ensure it is disease free **The "24/7" nature of the industry—reform penalty rates**

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		definition, application of respective provisions and clarity While they continue to provide the "bar'" against which individual and collective agreement making is measured within the industry progress in this area will remain limited and fragmented.	
Tourism Australia 2005 **National Road Tourism Strategy - Fact Sheet** http://www.tourism.australia.com/content/Niche/NRTSFactSheet.pdf key issues: 1. Cooperative strategic marketing 2. Possibility to develop new markets 3. Lack of awareness about road tourism sector 4. Need to increase road signage	**Cooperative strategic marketing** Opportunities for the strategic use of promotion and collateral needs to be identified and explored. **Possibility to develop new markets** Possibility to augment, modify or create new routes to deliver experiences required by a larger range of high priority domestic and international markets	**Lack of awareness about road tourism sector** Need to help stakeholders understand the nature of the industry and the key issues affecting the viability of the road tourism sector.	**Increase road signage** Develop road tourism market by increasing signage.
Department of Industry, Tourism and Resources July, 2005 **Restaurant and Catering Industry Action Agenda** http://www.ret.gov.au/General/Tourism-ILT/Pages/RestaurantandCateringIndustryActionAgenda.aspx Key Issues: 1. Dynamic industry 2. Improve marketing & target high yield customers 3. Improve awareness of the	**Dynamic industry** Australia's restaurant/catering industry is dynamic and adaptable and it provides quality food, wine and service. **Improve marketing and target high yield customers** Improve and increase sectors marketing and promotion. Target high yield to improve profitability. Threat that tourism growth is concentrated on low spend tourists and has competition from other markets. Strengthen industry skills in marketing and specialised product development. Encourage high yield tourists and develop new markets.	**Fragmented sector** Industry structure of many thousands of small players could complicate industry-led corrective action. **Globalisation** Economic conditions constantly changing and continually impacted by global events. **Poor perception of the industry as an employer** Perception that the industry is only suitable for casual work rather than a career. Make jobs in the industry more attractive bring workers to the sector.	**Need a well funded national industry body for sector** Industry lacks unified political position. Need to develop a strong, well-funded national industry body that can represent the industry at the national level. **Increase Collaboration** Greater collaboration and communication between all stakeholders including the wine and tourism industries to increase growth potential and improve productivity. **Changing consumer behaviour**

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industry 4. Decrease & simplify regulation 5. High quality, flexible labour market 6. Increase business skills & viability 7. Fragmented sector 8. Globalisation 9. Poor perception of the industry as an employer 10. Improve work environment 11. Low profitability & poor access to capital 12. Labour & skills shortages 13. Need a well funded national industry body for the sector 14. Increase collaboration 15. Changing consumer behaviour 16. Improve supply chains 17. Little development in productivity/business practices 18. Education & training Department of	**Improve awareness of the industry** Lack of awareness of export opportunities and of consumer motivations. Need awareness of the importance of cultural traditions in food and dining. **Decrease and simplify regulation** There are complex regulatory burdens, legislation, penalty rates and increasing compliance costs. Constant changing of government policies creating confusion. Need regulation that strikes a better balance between flexibility and responsibilities. **High quality, flexible labour market** Has high quality human capital to provide service. Flexible labour market, high growth potential, life style factor and passion for working in the industry. Greater use of opportunities for more flexible staff relations that match the nature of the industry. **Increase business skills and viability** There are low barriers to entering the sector which can allow in the unskilled with many new operators lacking basic business skills. Need to provide training for new managers/operators to raise skills, reduce failures and improve standards of business management.	**Improve work environment** Need better workplace relations, unfair dismissal laws and superannuation systems that balance the interests of all parties. Practices need to meet the needs of the low paid and improve employers capacity to increase wages. Work with stakeholders to pursue national consistency in workers compensation and workplace health and safety laws. Need a workplace relations environment that better reflects the nature of the industry. **Low profitability and poor access to capital** There are relatively low operating profit margins, low yield and problems accessing capital. Conservative sector that avoids risk which undermines diversification. There is a high rate of tenancy in business premises which reduces security. Cash-in-hand and non-complying operators undercut complying operators. These make the industry vulnerable to downturns. Need to increase use of environmentally friendly measures that save costs. **Labour and skills shortages** Highly labour intensive sector with high quality human capital. Over skilling raising employment barriers to unskilled. Shortages of skilled staff in certain categories. There is a shortfall in cooks and chefs in Australia and similar shortages in the number of service staff. Actively engage in the broader employment debate. Conduct, collate and utilise labour market and industry research to better understand the impact of employment legislation and regulations on restaurant and catering businesses. Need to investigate the impact of rising food and labour costs on operator profits, increasing competition within the industry and shortages of skilled staff. Need to enhance local expertise/skills and	Changing consumer lifestyle and eating preferences, competition for disposable income. Undertake research into consumer trends to help target marketing. Need to foster the development of innovative products and services that meet changing trends in consumer preferences. **Improve supply chains** Need to improve issues and increase efficient management of supply chains. Possible to use ecommerce to reduce costs, reach new customers and streamline purchases from suppliers. **Little development in productivity/business practices** While the sector has been innovative in menu and food development, it has been slow to adopt new methods of production and technology that lead to efficiency and competitiveness. Need to increase awareness of new technology, improve innovation and encourage use. Managers are time poor which limits innovation and training so they need to lessen their workloads. **Education and training** Industry needs to enhance local expertise and skills, attract and retain skilled staff and foster the development of innovative products and services that meet changing trends in consumer preferences. There is reliance on larger businesses for staff training. Need to aim for a more skilled and professional industry. Need to effectively use and improve the national Vocational Education and Training system (VET). Need to improve education and increase the quality of training. Need to ensure training that is provided suits the industry's need and helps build a more skilled and

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Industry, Tourism and Resources July, 2005 **Restaurant and Catering Industry Action Agenda**		attract/retain skilled staff.	professional workforce. Have greater links between education providers and industry to make training responsive to industry needs.
Tourism Australia 2006 **The Experience Seeker A Uniquely Australian Invitation: Strategy and Execution** http://www.tourism.australia.com/content/Destination%20Campaign/Strategy%20and%20Execution.pdf Key Issues: 1. A single strong brand 2. New communication channels due to technology 3. Un-adaptive marketing 4. Cannot & should not market to everyone 5. Target experience seeker	**A single strong brand** Tourism Australia has developed a strong brand by aligning the industry's marketing activities. It aims to convert positive yet passive predisposition towards Australia into active intent to travel to the country. It seeks to have prospective visitors think of Australia more often in a buying situation and ensure Australia remains top of mind and relevant for potential tourists. **New communication channels due to technology** New technologies have empowered consumers and opened up greater opportunity for direct engagement.	**Un-adaptive marketing** Tourism and destination marketing has remained relatively static over the years. **Cannot and should not market to everyone** Australia is not for everyone. Most people who travel internationally will never visit the country, particularly given the time, cost and distance. A target market more highly predisposed to what Australia has to offer will they stay longer, spend more and disperse into regional areas.	**Target the experience seeker** Experience seekers travel to experience the difference. They are a group of people that can best be satisfied by what Australia has to offer and with the characteristics best suited to meeting Australia's needs and objectives (e.g. high spend and dispersal).
Department of Industry, Tourism and Resources 2006 **Revised Action Plan for the Development of the Australia-Pacific Cruise Industry** http://www.tourism.australia.com/content/aussie_experiences/2007/RevisedActionPlanForAustralianCruiseIndustry2006.pdf Key issues: 1. Cooperative cruise marketing 2. Develop cruise industry's	**Cooperative Cruise tourism marketing** Explore marketing opportunities with TA, STOs and other cruise-ship stakeholders to grow the cruise shipping industry in Australia. Focus on visitors with high yield and propensity to disperse. Showcase Australia's cruising 'point of difference' particularly through eco tourism, indigenous and cultural experiences. Encourage development of Australian product and enhancement of passenger knowledge of the product. **Develop the cruise industry's**	**Simplify taxation and other regulations** Ongoing development of an equitable and efficient taxation system. Review fuel excises and duty free arrangements. There are accessibility problems with obtaining permits i.e. for gaming operations. **Environmental impacts** Pollution. Visits to protected areas. **Develop infrastructure.** Need to promote investment in cruise tourism infrastructure and encourage standardised and simplified policies and regulations.	**Problems with customs clearing for cruise passengers** Issues with border control. Customs is working closely with the cruise industry and partner agencies to explore technological and other solutions to enable easier clearance.

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capabilities 3. Simplify taxation & regulations 4. Environmental impacts 5. Develop infrastructure 6. Problems with customs clearing for cruise passengers 7. Education & training	**capabilities** Need a peak industry body and a standard port pricing system. Increase data, research and maritime security.		**Education and training** Educate local tourism operators regarding the requirements of international cruise lines. Educate key stakeholders including government, community and industry on the value of the cruise industry. Educate the tourism industry on the expectations of the international cruise market.
Tourism Australia 2006 **Action Plan for Japanese Tourism: Embracing change** http://www.ret.gov.au/Documents/FINAL_JAPAN_ACTION_PLAN2006_23030620060323122603.pdf Key Issues: 1. Continued growth of Japanese visitation to TNQ 2. Opportunity to reverse declining Japanese visitation 3. Develop Japanese niche markets 4. Lack of research & monitoring of emerging issues 5. Poor marketing 6. Lack of investment & product development 7. Increase coordination & collaboration 8. Maximise on aviation developments	**Continued growth in Japanese visitation to Tropical North Queensland** Tropical North Queensland has continued its commitment to the Japanese market and the collaborative approach and sustained efforts have seen continued growth in the Japanese market. **Opportunity to reverse declining Japanese visitation** Weak Japanese customer desire for Australia. Appreciation of the AUD against the Yen. Changes in consumer preferences for travel types and needs. Market impacted by significant world and economic events i.e. Japanese economic downturn. Depressed consumer sentiment, heightened career insecurity, reduced disposable income and more conservative consumer spending. Lack of destination / product awareness. Opportunity to reverse the decline. **Develop Japanese niche markets** Need to capitalise on Japanese niche markets for example, school excursion, honeymoon, working holiday makers and incentive.	**Lack of research and monitoring of emerging issues** Monitor emerging industry issues that need to be discussed and addressed. Perceptions of the market (sometimes based on myth rather than fact) have varied and even conflicted, impeding an effective industry-wide response to the market downturn. **Poor marketing** There has been irregular market presence by some key state / territory and regional tourism offices and the industry. A lack of marketing alignment by stakeholders and an overall reduction in marketing efforts collectively by Australia. Changes in branding and information delivery is potentially confusing to consumers and damaging to brand. Changing marketing and distribution systems. Increased tourism competition. Product offering does not reflect the brand. Eroding brand position. Australia has lost its 'fashionability'. Used to be seen as a big diverse country with a range of opportunities, now viewed more narrowly due to the reduced collective promotion by Australia. Shift away from multi city advertising to mono destination promotion. Australia's positioning is tending more towards a shorter, cheaper, closer destination at the lower priced end of the market. This is damaging the brand and leaving Australia uncompetitive. Impact of IT on marketing.	**Increase coordination and collaboration** Lack of coordinated approach to addressing issues, marketing and distribution. Stakeholders have been implementing solutions to regenerate the market according to their perceived issues and needs. Lack of stakeholder engagement and cooperation. Opportunities for generating business via bundling and promoting experiences are not being realised. Need to increase collaboration and cooperation among Australian stakeholders. Achieve the support and commitment of the Japanese travel industry in embracing changes. **Maximise on Aviation developments** Significant changes in aviation. Ensure air service products and pricing are competitive and provide good access.

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Tourism Australia 2006 **Action Plan for Japanese Tourism: Embracing change**		**Lack of investment and product development** Lack of product/experience/destination development. There has been inconsistent, un-integrated and insufficient investment in the Japan market. There has been an increase in skeleton packages (i.e. those with free time) and content reduced packages which are not meeting customer needs.	
Department of Industry, Tourism and Resources January, 2007 **Australian Government national Tourism Investment Strategy** http://www.ret.gov.au/Documents/AGresponse_jan20070110165941.pdf Key issues: 1. Economic growth of China & India 2. Strong marketing campaign 3. Major industry 4. Government involvement 5. Communication & collaboration 6. Increased the use of technology 7. Tax breaks for tourism operators 8. Tourism investment 9. Research 10. Tourism labour market 11. Develop aviation 12. Accommodation 13. Risk management 14. Increase product diversity/quality	**Economic growth of China and India** Increased demand from China and India creating new tourism demand. Projected growth in inbound tourism due to Approved Destination Status (ADS) for China. There is opportunity for the Australian tourism industry to engage more directly with the Chinese travel industry to ensure a close tourism relationship is established and maintained. Look for opportunities for partnership in developing the China market. **Strong marketing campaign** Through Australia.com Tourism Australia provides strong web interaction and engagement directly with consumers. Brand awareness—need to expand the Aussie Specialist program. Tourism Australia needs to explore partnership opportunities to disseminate travel information through other communication mediums. **Major industry** Tourism is a key economic driver for the Australian economy. It creates higher rates of economic growth and employment levels resulting in higher living standards. **Government involvement** The government works closely with industry to indentify and address impediments to growth and maximise	**Research** Need to educate tourism companies on government programs to increase research, development and innovation in the tourism industry. Need for more in-depth market research. Need to undertake market research and identify opportunities for improving the tourism experience. Explore opportunities for industry funding of research projects. **Tourism labour market** Tourism work is often characterised by seasonality. Use of different employment markets such as mature aged, long-term unemployed and Indigenous persons and increase industry linkages to enable seasonal employment for mobile workers. Undertake targeted promotional campaign outlining career opportunities available to people with multicultural back grounds and foreign language skills in tourism. Need to build a more highly skilled and responsive workforce to support Australia's long-term economic growth. Need to increase skills, apprenticeships and entrepreneurial skills for self-employment. **Develop Aviation**	**Increase diversity and quality of product** Meet a diverse range of motivations, holiday needs and purchasing and travel patterns. Ensure complexity and quality of the tourism product. Exploit and develop emerging markets. **Partner with National Parks** The Australian and state and territory governments in partnership with National Parks and Wildlife agencies are continuing to focus on identifying and implementing systems that facilitate sustainable tourism development in national parks. Use National Parks as a way to increase tourism and economic development. **Education, training and accreditation** Need to improve information on projected labour, skills and language shortages by undertaking a detailed training demand and needs audit/assessment at the local level. Use this as the basis for the development of a joint government and industry strategy to address the issue. Improve education and training for tourism workers. Provide incentives for tourism workers in remote areas. Tourism labour is seasonal and often of lower remuneration compared to other industries. The tourism industry should develop market-based solutions to

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15. Partner with national Parks 16. Education, training & accreditation 17. Destination management planning	yield. **Communication and collaboration** Increase information flows between all levels of government. Public—private partnerships to increase investment in industry's infrastructure. **Increase the use of technology** Expand the use of the internet and the opportunity to undertake online retailing. **Tax breaks for tourism operators** Tax breaks for rural and remote tourism operators—revise tax schedules covering assets such as hotel furniture and furnishings to reflect economic life of those assets, include landscaping and clearing and site improvements in the depreciation schedules to provide the opportunity to depreciate, replace or write off this type of asset. **Tourism investment** Develop new ways to bring tourism investors and investees together. Remove capital gains tax for international investors to attract foreign capital. Enhance planning and approval requirements and enforcement issues at the state, territory and local government level. Impediments to investment in infrastructure and accommodation i.e. regulatory barriers and tax issues. Possible longer term policy and infrastructure requirements. Need to invest in tourism infrastructure.	Passenger facilitation processes at airports Regulation issues, border and internal security requires new measures such as police officers at airports, a Counter Terrorism First Response capability at major airports, Joint airport intelligence groups, closed circuit television and stronger security measures and increased inspection of air cargo. Need to strengthen regional airports and ensure they have necessary security, staffing and infrastructure. Need to revise the definition of economic life of a small aircraft to five years rather than the current 10 years. The Australian-based airline industry makes a more market impact on the Australian economy. Need to continue to liberalise air service arrangements and to increase investment in transport infrastructure to increase access availability. Increase dispersal through regional airlines. **Accommodation** Growth in apartment style tourist accommodation. Need to increase and enforce regulation of backpacker accommodation. **Risk Management** Increase information and intelligence on security threats.	issues to be competitive in the skilled labour market. Increase accreditation to raise industry standards and provide information to consumers. **Destination Management Planning (DMP)** The Australian tourism industry has embraced DMP. It provides a foundation for building regional tourism business capability. It provides a platform on which state and territory governments build their tourism marketing and investment strategies and integrate tourism planning into regional strategies. For growth to be achieved all stakeholders must work in unison with clarity of vision and good leadership. DMP enables regional planning groups to develop well-researched proposals for attracting appropriate investment for their economic development. These processes embodied in DMP have been instrumental in bringing stakeholders together at the regional level to develop new tourism products that are likely to underpin economic development in the local community. DMP enables regional planning groups to develop well-researched proposals for attracting appropriate investment for economic development. Encourage the consistent development of DMPs, establish a body that analyses overall regional tourism development projects for the industry to assist in identifying collaborative opportunities, review DMPs regularly to find areas for improvement and realign objectives.
Department of Resources, Energy and Tourism January, 2007 **National Tourism Incident**	**Strong tourism industry** Boosted by a strong Brand Australia and the country's preferred destination status. **Implement the national Tourism**	**External threats** Terrorism, SARS, other international negative events, the collapse of Ansett, cyclones etc have impacted on Australia's international tourism numbers and yield.	**Communication** Distribute a daily bulletin to key stakeholders in the afternoon. Encourage all agencies to deal with the media and other stakeholders honestly and factually.

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Response Plan http://www.ret.gov.au/Documents/NTIRP20070321093000.pdf Key issues: 1. Strong tourism industry 2. Need to implement the national Tourism Incident Response Plan 3. Cooperation 4. External threats 5. Communication 6. Monitoring & management 7. Ensure national impact analysis is cooperative exercise with key stakeholders.	**Incident Response Plan** Its objective is to establish a framework to ensure incidents likely to affect the national tourism industry are managed in a coordinated whole-of-government way to minimise potential negative economic impacts to the industry. The plan sets out a process for delivering a coherent national response aimed at minimising the impact for incidents on the Australian tourism industry. **Cooperation** The plan acknowledges that collaborating with industry is a priority. The tourism industry and government have a history of successful collaboration and this plan outlines the specific agencies responsible for communicating with specific industry bodies.		Need to provide 'heads-up' briefing on emerging (sleeper) issues with potential to escalate into a national incident. **Monitoring and management** Monitor the incident, undertake day to day management of the incident and determine ways to commence recovery. Ensure national impact analysis is cooperative exercise with key stakeholders.
Department of Resources, Energy and Tourism April, 2007 **Tourism White Paper Annual Progress Report, 2006** http://www.ret.gov.au/Documents/TWP_Progress_Report_0620070420171843.pdf Key Issues: 1. Australia's natural assets 2. Quality tourism product 3. Strong marketing focused on increasing yield 4. The ADS with China 5. Develop niche markets 6. Investment strategies to boost infrastructure 7. Succession planning for tourism 8. Aviation 9. Domestic visitation 10. Research	**Australia's natural assets** Australia's unique natural and cultural environment continues to be a major draw card for visitors. The tourism industry has a critical role to play in ensuring this environment is sustained. **Quality tourism product** The tourism industry's ability to meet and exceed customer expectations through high-quality products and services is another key element of a sustainable tourism industry which is capable of generating high yield. **Strong marketing focused on increasing yield** Tourism Australia's destination campaign. Brand Australia aims to strengthen the emotional bonds people have with Australia and increase its appeal. Aimed at visitor yield. **The approved destination scheme with**	**Aviation** regional airports and airlines have lower security measures. Need to facilitate passengers at airports by enhancing visitor processing, border security and identity recognition. **Domestic visitation** Weak domestic tourism. Issue of accrued leave stockpiling. **Research** Strong research base. Gap in existing tourism data which requires addressing. Need for cost drivers and market specific studies. **Policy and pricing issues** Pricing and regulatory issues. Issues associated with the Tourist Refund Scheme. **Park management**	**Importing tourism labour** Increasing labour and skills shortages. The focus of Australia's temporary and permanent migration arrangements is on the entry of highly skilled workers, particularly those with skills in demand in the Australian labour market. Seasonal needs are supported through the WHM Scheme. The WHM program allows working holiday makers to have an extended holiday in Australia. There are reciprocal working holiday arrangements with 19 countries. Reforms to WHM scheme has allowed visa holders to work for up to 2 years provided they undertake 3 months of seasonal harvest work in regional Australia. **Join the UNWTO** Australia joined the UNWTO in Oct 2004 as a Tourism White Paper initiative. Australia is working with the UNWTO to ensure 3 key priority areas for Australia are included in the UNWTOs forward

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
11. Policy & pricing issues 12. Park management 13. External threats 14. Importing tourism labour 15. Join the UNWTO 16. Collaboration 17. The Japanese action plan 18. The Uhrig review	**China** **Develop niche markets** Captialise and grow new emerging markets i.e. road tourism, Indigenous tourism. This allows diversification and economic independence for communities and sectors, particularly in rural and remote areas. **Investment strategies to boost infrastructure** **Succession planning for tourism businesses**	**External threats** Possible pandemic. Other international and regional issues. Need to increase risk management.	work program: labour/skills shortages, security and quality. **Collaboration** Take a whole of government approach to tourism to remove duplication, maximise opportunities and facilitate partnerships and innovation. **The Japanese tourism action plan** **The Uhrig Review** Aimed at assessing Tourism Australia's governance
Winemakers Federation of Australia May, 2007 **Wine Australia: Directions to 2025** http://www.ret.gov.au/Documents/TWP_Progress_Report_0620070420171843.pdf Key issues: 1. Use tourism as a way to boost sales 2. Develop a major trade & media event 3. Changing consumer behaviour 4. Environmental impacts 5. Collaboration	**Use tourism as a way to boost sales** Tourism as your route to market—use tools and resources to improve wine tourism business practices such as the QFA cellar door benchmarking program and the Wine Tourism Toolkit. Work with regional wineries and tourism agencies to promote cellar door visits and create direct sales opportunities as a highly effective route to market. **Develop a major trade and media event** Hold an event in Australia every second year to showcase the Wine Australia brand segmentation strategy with an opportunity to extend visits into focus regions.	**Changing consumer behaviour** Changing social concerns, demographics and consumer expectations. **Environmental Impacts** Wine making can have environmental impacts that contribute to climate change. Need for water, waste and biodiversity management and green procurement. Need for continuous improvement in environmental performance and emphasis on ensuring widespread social responsibility.	**Collaboration** Industry needs to develop its partnerships with the government sector. Need to facilitate collaboration between research agencies to lead the world in research and development efficiencies and value.
Indigenous Tourism Australia October, 2007 **National Strategy for Indigenous Tourism 2007-2012** http://www.indigenoustourism.australia.com/content/PDF/Indigenous%20Roadshow%20Rpt%20LR.pdf Key Issues: 1. Develop Australia's marketing	**Develop Australia's marketing** Develop greater market knowledge. Build Australia's destination appeal and global competitiveness through the development of indigenous tourism as a key part of Australia's unique tourism attraction. **Develop supply chains** Develop business sustainability through building capacity along the entire business chain. Opportunities for more effective distribution and links to the markets (i.e.	**Focus on business development ignoring other issues** To date there has been emphasis on the development of businesses without taking into sufficient consideration key market related issues such as marketing, distribution, sales, access and revenue and business sustainability. Community pressures and cultural issues limit time Indigenous operators can dedicate to learning and networking.	**Indigenous Tourism Australia** ITA's goal is to lead the development of Indigenous involvement in tourism, the quality and sustainability of Indigenous tourism enterprises and the promotion and integration of Indigenous tourism as a part of the overall Australian experience. ITA's aim is to create a cohesive direction and strategy for the long-term development of Indigenous tourism in Australia.

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
2. Develop supply chains 3. Diversify the product base 4. Engage the Indigenous people 5. Build Australia's appeal 6. Contribute to Indigenous economic development 7. There has been a focus on business development ignoring other issues 8. Land tenure 9. Indigenous Tourism Australia 10. Develop innovative programs and experiences 11. Create partnerships & increase collaboration 12. Indigenous labour 13. Income support programs 14. Work with National Parks & Arts	ecommerce channels). **Diversify the product base** Indigenous tourism will strengthen Australia's tourism appeal, experiences and ensure Australia's global competitiveness. **Engage the Indigenous people** Build a greater understanding of and engagement with tourism by Indigenous people through the development of skills, knowledge and experience. Increase the opportunities for active participation in tourism and create more sustainable economic outcomes for indigenous Australians. Increase the opportunities for an active participation in tourism and create more sustainable economic outcomes for indigenous Australians. **Build Australia's appeal** Build Australia's destination appeal and global competitiveness through the development of indigenous tourism as a key part of Australia's unique tourism attraction. **Contribute to Indigenous economic development** Provide opportunity for Indigenous people to create wealth. There is an opportunity to develop innovative Indigenous tourism programs that respond to emerging issues and trends such as climate change and the opportunity to develop ancillary programs and encourage greater engagement through a range of 'voluntourism' programs.	**Land tenure** Overcome the issue of land tenure preventing the development of tourism businesses and joint ventures on Indigenous land—encourage the federal government to examine the issue of land tenure to allow greater opportunity for Indigenous business development on Indigenous land.	**Develop innovative programs and experiences** Encourage innovation and the development of new experiences based on traditional and contemporary culture and lifestyles. Focus on innovations that offset climate change and promote 'voluntourism'. **Create partnerships and increase collaboration** Develop strong partnerships and better business outcomes. There is a need to create stronger partnerships between the tourism industry and other stakeholders with Indigenous tourism to develop its potential and increase its value to all parties. Opportunity to share skills and experience. Work closely with ATEC, ITOs and other organisations and sections of the distribution network and by promoting through education and information to facilitate greater engagement of the distribution network with Indigenous tourism operations. **Indigenous labour** As well as creating more commercially sustainable businesses there needs to be better coordination and further extension and adoption of Indigenous training and employment opportunities in the tourism industry. **Income support programs** Encourage the provision of income support programs, in lieu of Community Development Employment Program (CDEP) to allow Indigenous tourism businesses time to adjust to policy changes.
Indigenous Tourism Australia			**Work with national Parks and Arts**

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October, 2007 **National Strategy for Indigenous Tourism 2007-2012**			Develop working relationships with federal/state administrations for Parks and Arts to create opportunities for indigenous involvement in interpretation of nature and arts experience.
Tourism Australia November, 2007 **Planning for Inbound Success** http://www.tourism.australia.com/content/Marketing/planning_for_inbound_success/planning_for_inbound_success_2007.pdf Key issues: 1. Inbound tourism 2. Asian economic recover 3. Use the internet to market 4. Cooperation 5. Meet face to face with trade & consumers 6. Changing travel distribution systems 7. Changing consumer behaviour 8. Communication 9. Maximise marketing 10. Pricing 11. Indentify the customer 12. Educate the wholesaler & ITOs	**Inbound tourism** Inbound tourism is all international tourist traffic entering a country. It is known as 'export tourism' as it contributes to the export economy. Need to increase export tourism by increasing the inbound traveller. Inbound tourism also provides opportunity to meet people from different cultures, to promote Australia, to increase employment and increase visitor dispersal. **Asian economic recovery** Economic recoveries in most Asian nations increasing Australia's inbound tourism. **Use the Internet to market** Website development: quick to load, easy to use, clear and grouped information, secure domain, accurate and up to date information, clear validity dates on rates, secure payment technology and language is simple. **Cooperation** Opportunity to undertake cooperative marketing with Tourism Australia, STOs and RTAs. These are cost effective and offer greater exposure. Cooperative online and print advertising. **Meet face to face with trade and consumer** Opportunity to meet face to face with both trade and consumers through sales missions, sales calls, staff training and trade shows.	**Changing travel distribution systems** The travel distribution system has traditionally been very structured with clearly defined functions for each role in the chain. However as technology and company mergers transform the tourism industry, there is an increasing amount of cross over in the roles and functions of various sectors of the distribution system. The traditional structure of the distribution system includes ITOs based in Australia, tour wholesalers based overseas and the international retail agents, the link to the international consumer. However this varies considerably from market to market. In some countries, such as Japan, the system is very structured while in other markets a structure system has not developed. **Changing consumer behaviour** Increasingly people travel for reasons associated with their personal interests including lifestyle, hobbies, culture and charities. An opportunity, however, is to maximise on technical tours of agriculture and manufacturing businesses which are becoming increasingly popular i.e. in China and Latin America. **Communication** There is a need to keep the international travel trade informed of issues.	**Maximise marketing** Have a good marketing plan and strong marketing. Maximise promotion for Australia through a media relations program incorporating media visits, new technology, information distribution and issues management. Encourage use of TA and STOs media units which have contacts and know how. **Pricing** Understanding the consumer, guides development of the tourism product, how to price the product and where it is offered for sale and how. **Indentify the customer** Need to identify customer characteristics such as age, socio economic background, lifestyle choices and personal values. Needs to define those customers who may be interested in the tourism product. **Educate the wholesaler and ITOs** Provide the wholesaler and key frontline sales staff with ongoing education and product updates to keep the product in front of mind. Planning familarisations for sales staff is an effective method of educating wholesaler partners. Training to educate frontline staff on the tourism product and how to sell it is essential. Training should not just be within businesses but also with ITOs, international wholesalers and the traveller so they can effectively sell and purchase the product.
Restaurant and Caterers	**Dynamic, diverse, resilient, strong and**	**Low barriers to entry raise competition**	**Encourage responsiveness to changing**

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Australia and the Department of Industry Tourism and Resources 2007 **The Business of Eating Out - including Status updates Part 1, 2 and 3** http://www.ret.gov.au/Documents/ Key Issues: 1. Dynamic, diverse, resilient, strong, adaptable industry 2. Quality restaurants, food, wine, caterers & service 3. Established tourist market, with high awareness of the quality of our food 4. Well established & committed industry peak body that has national coverage 5. Nationally recognised training base 6. High quality of food, wine & service 7. People need to eat & eating out is an established social & cultural event 8. Passion & aspirations of people in the industry 9. Wide geographic base, covering both regional Australia & cities 10. Action agenda process has developed vision 11. High growth potential 12. Innovative in certain fields 13. Flexible staff skills 14. Has economic impact 15. Improve quality & professionalism 16. Issues with employment	**adaptable nature of the industry** **Quality restaurants, caterers, food, wine and service** **Established tourist market, with high awareness of the quality of our food** **Well established and committed industry peak body that has national coverage** **Nationally recognised training base** **High quality of food, wine and service** **People need to eat & eating out is an established social and cultural event** **Passion and aspirations of people in the industry** **Wide geographic base, covering both regional Australia and cities** **Action agenda process has promoted industry vision** **High growth potential** **Innovative in certain fields** **Staff have transferable skills** **Industry has economic impact** Industry contributes to economic growth both directly and indirectly through impact on other industries such as tourism and produce.	**and allow in the unskilled** **Improve workplace relations and superannuation** Need a workplace relations environment that better reflects the nature of the industry. A superannuation system that balances the interests of all parties. Issues with time-keeping arrangements & need to educate industry members on business opportunities, rights & responsibilities under *Work Choices* legislation. Need to build an industry that works within a more flexible workplace relations environment that better reflects the nature of the industry. Inappropriate penalty rates and unfair dismissal laws. **Improve training** Need for better business education, employment and training. Need high quality training that is suited to industry needs and helps build a more skilled and professional industry. **Need to improve standards of business management, marketing, promotion, technology and innovation** **Improve quality and professionalism** Need to build an industry that is more skilled and professional, with a good supply of quality staff and more skilled business managers. **Issues with employment growth, the needs of the low paid and the capacity of employers to pay increased wages, and productivity** **Lack of business skills of new operators** **Perception that the industry is only suitable for casual work rather than a**	**consumer demands** **Develop a strong and well-funded national industry body** That can effectively represent the industry at the national level. Industry peak body under-resourced. **Increase links between industry and education providers** Greater links between education providers and industry to make training responsive to industry needs, especially small businesses **Research into consumer trends** Research into consumer trends to help target marketing, both generic and by individual operators **Improve eco-efficiency in the industry** Greater use of environmentally friendly measures that save on costs **More efficient management of supply chains** **Develop industry support and funding opportunities i.e. the Australian Tourism Development Program, AusIndustry funding, other government SME funding—reduce barriers** Build on funding from AusIndustry to map technology needs, as a basis for dissemination activities to encourage wider use of technology e.g. in marketing and to manage relations with suppliers. Identify why AusIndustry programs are not widely used by the industry as basis for improved utilisation. **Increase e-commerce** Use e-commerce to reduce costs, reach

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growth, low paid, low capacity to pay higher wages & productivity 17. New operators lack skills 18. Poor perception of the industry as an employer 19. Low operating profit margins 20. Managers time poor 21. Problems of SME industry 22. Low profits & low yields 23. Cultural attitudes can constrain service levels 24. Reliance on larger businesses to train staff 25. Lack of awareness of export opportunities 26. High rate of tenancy reduces business security 27. Managers do not see government support programs as applicable 28. No industry brand, little interaction with tourism/ wine, industry often not seen as a part of tourism 29. Lack awareness of consumer motivations 30. Gambling/gaming venues can have legislation-based advantages (i.e. smoking) 31. Few productivity gains 32. Industry has under-developed public relations skills & lacks unified political position 33. Industry structure of many SMEs makes industry-led corrective action difficult 34. Tourism growth may be concentrated on low spend tourists & face competition from other		**career** **Relatively low operating profit margins, complex regulatory burdens and penalty rates** **Managers time poor, limiting innovation and training** **Problems of a small-business industry i.e. access to capital, vulnerable to downturn, risk avoidance, difficulty with complex legislation** **Low profits and low yields** **Cultural attitudes in Australia can constrain service standards** **Reliance on larger businesses for staff training** **Lack of awareness of export opportunities** **High rate of tenancy in business premises reduces security** **Managers often do not see government support programs as applying to themselves** **No unifying brand, and patchy interaction with wine and tourism promotion; industry often not recognised as a part of tourism** **Lack of awareness of consumer motivations** **Gambling and gaming venues can have**	new customers and streamline purchases from suppliers. **Encourage high yield tourists** Better improved collaboration with tourism and wine promotions. **Reduce the regulatory burdens/ complexity and compliance costs** Complex regulatory burden and compliance costs. Need to develop government policies and regulations that are more sensitive to the industry. Regulation of the industry that strikes a better balance between flexibility and responsibilities (including reform of unfair dismissal laws). **Collaborate with the wine and tourism industries as they have high growth potential** **Develop the Labour force** Enhance local expertise and skills, attract and retain skilled staff. Training for new managers to raise business skills and reduce business failures. As a highly labour intensive sector, the strength of Australia's restaurant and catering industry is linked with the quality of its human capital. To fully realise emerging opportunities, the industry needs to enhance local expertise and skills, attract and retain skilled staff and foster the development of innovative products and services that meet changing trends in consumer preferences. **Develop a project that benchmarks restaurant occupancy nationally** **Develop and implement a hospitality careers campaign**

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markets 35. Conservatism & risk avoidance slowing product diversification, use of technology & training 36. Over-skilling raising employment barriers 37. Possible changes to consumer lifestyle & eating preferences 38. Competition for disposable income 39. Economic conditions 40. Global events e.g. SARS 41. Changing government policy 42. Cash-in-hand/non-complying operators undercut other operators 43. Impact of gaming & gambling discounting 44. Responsiveness to changing demand 45. Develop strong, funded national industry body 46. Increase links between industry/educators 47. Market research 48. Improve eco-efficiency 49. Efficient management of supply chains 50. Develop industry support & funding opportunities 51. Increase e-commerce 52. Increase high yield tourists 53. Reduce the regulatory burdens/complexity & compliance costs 54. Collaborate with the wine & tourism industries—they have high growth potential 55. Develop the labour force 56. Benchmark restaurant		**legislation-based advantages e.g. no smoking restrictions** **Few productivity gains made** **Industry as a whole has underdeveloped public relations skills and lacks unified political position** **Industry structure of many thousands of small players could complicate industry-led corrective action** **Tourism growth may be concentrated on low spend tourists and face competition from other markets** **Conservatism and risk avoidance undermines product diversification opportunities, new technology, training** **Over-skilling raising employment barriers to the unskilled** **Possible changes to consumer lifestyle and eating preferences** **Competition for disposable income** **Economic conditions, i.e. a downturn in economic activity leads to a downturn in people eating out** **Global events, e.g. SARS, terrorism** **Increasing compliance costs** **Change in government policies** **Cash-in-hand and non-complying operators undercut complying operators** **Impact of gaming and gambling discounting**	**Aim to attract international gourmet events and festivals to Australia** **Increase industry use/understanding/ awareness of technology and innovation** Low usage and uptake of technology. Industry use of technology/innovation to increase efficiency/competitiveness in management, design, product development, marketing and energy use. Better understanding that innovation includes non-technological innovation. Business access to information on what technologies are available. Develop innovative solutions by fostering the development of innovative products and services that meet changing trends in consumer preference. **Increase skills, professionalism, education, training & traditions** A more skilled and professional industry. The industry is more widely seen as a sound long-term career choice. Effective use of, and ongoing improvement in, the national Vocational Education and Training (VET) system. Greater understanding of the importance of the cultural traditions of food and dining. **Increase skilled & targeted marketing & promotion of the industry through cooperative marketing** Improve industry sustainability through skilled marketing and promotion. Better understanding of consumer behaviour and market segments that assists marketing at the international, national, regional and individual business levels. Stronger collaboration between food, tourism and wine sectors. Improve packaging, promotion and branding of

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occupancy nationally 57. Develop/implement careers campaign 58. Attract international gourmet events & festivals 59. Increase industry use/ understanding / awareness of technology & innovation 60. Skills/education/training/ professionalism/traditions 61. Cooperative marketing			restaurants and regions, including promotion of the value and level of service.
Tourism Australia 2008 **Tourism Australia's Corporate Plan** http://www.tourism.australia.com/content/About%20Us/Corp_plan0708_0910.pdf Key issues: 1. Develop niche markets 2. Strong brand 3. Grow high yield markets & dispersal 4. Increase access 5. Lack of research into the experience seeker 6. Increasing competition 7. Changing consumer behaviour 8. Lack of support for marketing 9. Sustainable tourism 10. Indigenous Tourism Australia 11. Collaboration & cooperation	**Develop niche markets** Increase opportunities for niche market products. Key priorities are the development of the Indigenous tourism sector, the major and business events sector and voluntourism. **Strong brand** **Grow high yield markets and dispersal** Maximise visitor spend within Australia and ensure that spend is dispersed throughout Australia, providing economic benefits to regional Australia and major cities. Use established markets to drive high yield business. Use growth markets to grow visitation and high yield. Identify gaps in Australia's experiential content and educate industry to help develop experience content that supports Brand Australia. **Increase access** Introduction by Qantas of USA services provides an opportunity for strong growth in travel by US visitors to Australia and/or outbound Australians to America.	**Lack of research into the experience seeker** Lack of research into TA's target market—the experience seeker—providing insights into consumer behaviour, attitudes and emotional triggers, socio-demographics etc. Further research needed to identify, quantify, develop insights and track performance of major high growth/high yield market opportunity segments. **Increasing competition** **Changing consumer behaviour** Changes in consumer behaviour (distribution systems, technology), Economic conditions and policy settings in key tourism markets (value of the AUD, unemployment, GDP growth, industrial arrangements, competition policy, consumer protection laws, changes in airline capacity, the traditional barriers of time, distance and cost. **Lack of support for marketing** Need to gain support for TAs international and domestic marketing activities.	**Sustainable Tourism** To help foster a sustainable tourism industry in Australia. To stimulate sustainable international and domestic demand for Australian tourism experiences through industry leadership and coordination and to influence the actions of the industry's tourism and travel marketing. **Indigenous Tourism Australia** Aim to improve profitability/sustainability of Indigenous tourism businesses through micro-financing and capital venture schemes. Aim to develop a national footprint for sustainable tourism experiences which identifies key actions for developing sustainable Aboriginal experiences and provides a cohesive framework for ITA and stakeholders. Work with the distribution system to increase Indigenous tourism experiences in mainstream tourism programs and events. Increase development and marketing of iconic Indigenous festivals, assist development of e-commerce Indigenous tourism businesses and increase depth and breadth of Indigenous experiences

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			content available throughout Australia to promote uptake of product and stimulate consumer awareness and interest. Increase capacity building, skills training and business mentoring to improve Indigenous tourism product. **Collaboration and cooperation** Proactively engage and assist stakeholders. Work cooperatively with industry to educate the overseas travel trade and sell Australia through key initiatives such as the Aussie Specialist Program, trade events and tactical marketing activities. TA must collaborate closely with industry through cooperative marketing and research and collaborate closely with DRET.
Tourism Research Australia 2008 **Through the looking glass** http://www.tra.australia.com/content/documents/Domestic%20Stage%203/FINAL%20-%20Through%20the%20looking%20glass.pdf Key issues: 1. Changes in technology 2. Accommodation & transport 3. Flat domestic growth 4. Changing consumer behaviour 5. Domestic product quality 6. Labour market 7. Changing distribution systems 8. External threats 9. Environmental impacts 10. Globalisation 11. Industry is not collaborating effectively 12. Lack of domestic interest	**Changes in Technology** Continued use and development of e-commerce, online technologies and the internet will further improve efficiencies. Increase yield management and grow businesses competitive advantage. New internet technologies like on line travel agents can make it easier for consumers to research and book travel without leaving home. Tourism businesses that stay up to date will benefit. However consumers may never leave their home i.e. the 'virtual closet'.	**Accommodation and transport** Lack of affordable accommodation. Consumers feel the only option is the luxury end of the rate scale; otherwise accommodation was neutral and characterless. Price of domestic transport and accommodation remain high. **Flat domestic growth** Flat domestic visitation in terms of visitors and nights. The strength of the Australian economy affects domestic tourism. If the economy is strong and consumer confidence is high, consumers are likely to spend on discretionary goods. Currently the Australian dollar is strong against other major currencies making an overseas holiday affordable to domestic people but Australia is expensive for overseas travellers. **Changing consumer behaviour** Changing Australian demographics. Substitution for tangible goods, travelling less often and for shorter periods and a lack of product to stimulate demand and match marketing. Businesses need to better	**Lack of investment in infrastructure** Property/infrastructure investment. It is believed that Australia requires critical infrastructure investment regionally to attract future and sustained visitation. However, given issues like drought, accessibility, including road bypassing and costs being faced in regional Australia, investment in property and infrastructure is seen as risky with return on investments viewed as poor. **Industry is not collaborating effectively** The current balance between competition and collaboration within the industry is far from optimal. There would be significant benefits in undertaking an exercise to identify where collaboration can lead to the greatest gains. **Lack of domestic interest** Participants questioned whether instilling national pride, teaching more of Australia's heritage and geography, encouraging an appreciation of our Indigenous history and continuing to develop parochial feelings will help to

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Tourism Research Australia 2008 **Through the looking glass** 13. Lack of strategic industry management		understand their consumers, increase efficiencies and networking. The trend towards shorter trips has created some short term opportunities, such as packaging and promotion of competitive 'short, quick-fix domestic offerings'. Ageing population, changing family structures, increased number of sole parents and single person households, and changing demand for experiences that offer value for money. **Domestic product quality** Overall decline in the product/service quality across the board. There is a lack-lustre feel for many of Australia's domestic offerings and a general lack of renewal that needs to be somehow addressed. **Labour market** Labour and skills shortages. Tourism could be more competitive by delivering experiences that better match the needs of an increasingly demanding and discerning customer base. This means better/more innovative products. This requires people with better skills to service the consumer. Tourism is on a path toward a higher cost structure. Tourism is labour intensive, but a number of its non-tourism competitors are not. Tourism faces a skills shortage, like many competing industries. To attract and keep professionals, tourism career paths need to be well defined and wages/conditions need to improve, leading to further costs. **Changing distribution systems** **External threats** Terrorism, regional conflicts, health risks and pandemics coming to Australia.	create the habitual appetite for future Australian generations to travel at home. **Lack of Strategic Industry Management** Several strategic and operational issues need to be resolved. Issues include experience offered, product and service, political, economic, technological, environmental, demographic and social issues and issues specific to the tourism industry. If issues are out of the industry's control it is important to include them in contingency planning and risk management plans. The industry sees the issues facing the future of domestic tourism as still being very much at the fundamental strategic level, requiring deeper understanding and prioritisation. They believe these developments will need to happen before further thinking and idea generation can take place.

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Tourism Research Australia 2008 **Through the looking glass**		**Environmental impacts** Tourism relies on the natural environment, but it is steadily being destroyed by tourism/tourism industry. Climate change is a big issue affecting travel behaviour. Global weather patterns will change and impact on transport and resorts. Too much free consumption of Australia's natural environment. Explore innovative ways of extracting more economic gain from all visitors to help boost and sustain further developments. **Globalisation** Increasing growth/strength of non-western economies like China, India and Korea, increased tourism competition, terrorism, regional conflicts and health risks and pandemics, tighter security and tougher border controls. These threats make Australia a relatively attractive destination.	
Department of Resources, Energy and Tourism February, 2008 **Industry Quality and Standards** Key issues: 1. Increase reputation 2. Increase accreditation & compliance	**Increase tourism industry's reputation** The government is implementing measures to enhance the tourism industry's reputation for delivering high quality and enriching experiences.		**Increase accreditation and compliance** Help the industry develop national, voluntary, industry led accreditation and encourage compliance with all relevant Commonwealth and state legislation
AusIndustry February, 2008 **Business Ready Program for Indigenous Tourism** and **Australian Tourism Development Program**	**Create employment and stability for indigenous people** Indigenous tourism can provide opportunities for employment, social stability and the preservation of culture within Indigenous communities.	**Lack of skills in Indigenous businesses** There is a lack of management, business and strategic planning skills in Indigenous tourism businesses. Need to help Indigenous tourism operators effectively design, manage and operate a successful tourism business. The program encourages Indigenous	**Develop infrastructure and tourism products** Programs target projects that develop attractions, facilities, experiences or infrastructure, develops indigenous, nature based, cultural or heritage experiences, is innovative or will increase tourism. Programs aim to support initiatives that will promote tourism development in

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http://www.ausindustry.gov.au/library/BRPIT_Feb08_final20080229023449.pdf http://www.ausindustry.gov.au/library/ATDP_final_feb200820080229015736.pdf Key issues: 1. Employment & stability 2. Meet demand 3. Develop skills in Indigenous tourism 4. Develop infrastructure & products 5. Increase collaboration	**Meet demand** There is strong demand for Indigenous tourism products with research by TA showing they are desirable for most international visitors, just under half of all Australians have an interest in indigenous tourism experience.	participation in tourism activities as a way to help achieve independence for Indigenous Australians.	regional and rural Australia and contribute to long term economic growth. **Increase Collaboration** Programs target large-scale, multifaceted activities that involve a number of regions collaborating.
Department of Resources, Energy and Tourism March, 2008 **national Tourism Accreditation** Key Issues: 1. Quality destination 2. Service & product quality 3. Increase accreditation	**Quality destination** Australia is a high quality tourist destination. There are many industry organisations and many state and territories already with accreditation or rating systems in place.	**Service and Product Quality** Tourists are becoming more discerning about the tourism experiences they are seeking. Standards in other countries are rising. Service and product quality are vital to Australia's reputation as a tourist destination.	**Increase Accreditation** Australia must strive for continuous improvement/best practice to remain competitive. Raise professionalism and standards through accreditation. Government is seeking to work with industry/state/territory to develop a national accreditation system.

Appendix D: State Tourism Strategies

New South Wales

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Tourism New South Wales 2002 **Towards 2020: New South Wales Tourism Masterplan** http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib10/Masterplan%20-%20Full%20Version.pdf Key issues: 1. Strength & diversity of natural destinations in NSW 2. Tourism creates new employment 3. Technological advances 4. Develop inbound markets for state-wide visitation 5. Develop niche markets 6. Dispersal 7. Sustainable development through triple bottom line 8. Growth in nature based tourism 9. Internationalisation of Asian cultures 10. Ageing population 11. Tourism investment 12. Safety & security 13. Rising insurance costs 14. Threats to the environment 15. Managing high growth areas 16. Aviation 17. Managing tourism growth for Sydney 18. Research & analysis 19. Changing consumer behaviour 20. Indigenous tourism	**Strength and diversity of natural destinations in NSW** **Tourism creates new employment** Opportunities to increase the number of nature-based and culture tourism-based jobs as well as expand related businesses and further employment opportunities. **Technological advances** Further advances in technology are expected, this will impact on how people choose, book and pay for tourism. Improved communication tools allow a new level of information delivery. Consumers can compare tourism experiences at a global level. Develop strategies that aim to improve business access/use of the Internet and IT in regional NSW via the Community Technology Program. **Develop inbound markets for state-wide visitation** **Develop niche markets** Develop, promote or expand tourism products and experiences from non-tourism businesses i.e. transport, mining and agriculture. Build on regional branding attributes already in place i.e. agriculture. Identify and enhance new natural attractions, events, Aboriginal arts, culture and heritage, man-made anchor attractions, cycling and walking trails and backpackers. A regional cuisine program can develop food products, provide opportunities for growers and improve restaurants.	**Tourism investment** Economic and non-tourism business growth. Other sectors of the economy have been outperforming tourism in competing for the investment dollar. Growth of tourism could be limited if it is not perceived as an attractive investment option. Need to physically improve the tourism product throughout NSW by increasing investment and funding new products or refurbishing and improving existing products. Actively promote the opportunities and benefits of investing in tourism in NSW. Select areas of NSW for investment and promotion. Increase investment in quality tourism product. **Safety and security** Has become key issues for travel providers and travellers adding to travel costs and time. Travellers are more likely to reassess the destination status of countries and this may favour nations perceived as relatively more secure. Need to work closely with NSW police/law enforcement and emergency services. **Rising insurance costs** Change in risk assessment and acceptance following September 11, failure of HIH etc are likely to increase insurance costs relating to tourism - particularly for adventure and wilderness operators. **Threats to the environment** Growing visitor numbers can be expected to intensify and create demand in protected areas, potentially creating visitor management issues. Threat of destroying or devaluing things valued by residents.	**Research and analysis** Needs to occur from both an historical and future perspective. Improve the quality, quantity timeliness and relevance of research data and its dissemination. Need a new project or development register; a comprehensive tourism business performance database; a tourism product investment value database; information on the economics of visitor activities i.e. fishing; data on nature-based and cultural tourism; and support for a research library within industry groups (i.e. PCA and TTF). Consolidate and communicate research findings related to visitor recreation and nature tourism. Measure and evaluate tourism indirect impacts. **Changing consumer behaviour** Changing consumer expectations will require a much more specialised approach to marketing in the future. Upper end consumers tend to be more fragmented, individualistic, demanding, informed and discriminating. While brand loyalty can be expected to remain strong among older consumers and higher income earners, savvy consumers will rate such issues as price, health and the environment at the top of their shopping list. The trend to shorter holidays will increase. Australians have been taking fewer holidays. **Indigenous tourism strategy** Develop a NSW Aboriginal Tourism Strategy targeting key issues such as: Aboriginal business and employment

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strategy 21. Destination management planning 22. Coordination, cooperation & communication 23. Increase profile & voice for tourism in government 24. Increase government funding for tourism promotion 25. Develop events 26. Ensure tourism profitability & viability	**Dispersal** Opportunity to increase the movement of visitors into regional and rural NSW. Develop and position Outback NSW in the natural attractions, Aboriginal and arts and heritage tourism markets. **Sustainable development through triple bottom line** Promote a sustainable tourism industry through triple bottom line management which embraces the environment, economy and society. Maintain, protect and enhance the environment. Promote sustainable environmental practices and environmental preservation. **Growth in nature based tourism** Growth in nature-based tourism activity which aims to protect and conserve habitats for threatened species. A simplified licensing process would encourage accredited tour operators to provide quality nature experiences. Increase visitor access to national parks but balance it with conservation. **Internationalisation of Asian cultures** Growing 'internationalisation' of Asian cultures is likely to motivate travellers to seek out destinations like Australia. **Ageing population** Expected to lead to increased tourism among fifty five plus year age group. Need to be ready for influx of senior travellers who will be less mobile. Need easy access to tourism products and services, increased demand for car tourism will require signage and information on tourist routes and drives to be 'state of the art'. Need better roads and signage.	Need to protect threatened species and habitats. **Managing high growth areas** Effective management will require well-designed strategies for managing tourism in high growth areas. Need an adaptive approach as well as risk management given the lack of information on some matters. Coordination of tourism tends to occur both horizontally across different government agencies and vertically through different levels of government. Develop niche markets rather than mass markets. **Aviation** Expected decline of airlines worldwide. Deregulation of international air travel has increased competition and led to new alliances and risks. Bilateral air agreements have distorted free market forces. Sydney Airport has capacity issues. Issues with the hubbing of regional airlines. **Managing tourism growth for Sydney** Increase in passenger flows at Sydney Airport. Hotels, serviced apartments and other commercial accommodation are of insufficient quantity and quality to cater for increasing numbers. Need essential visitor services i.e. inner-Sydney public transport and policing. Need to develop environmental protection measures capable of preserving the natural and social attractions that enhance a Sydney experience. Spread out visitor experiences and attractions. Foster tourism awareness to ensure host city attitudes to visitors remain positive. Promote and develop Western Sydney's tourism attractions and infrastructure.	opportunities; an introduction to Aboriginal Australia in Sydney; initiatives to link Aboriginal culture and heritage with attractions and events; product authenticity and accreditation. **Destination management planning** Opportunity remains to cement strategic relationships and adopt a more complete destination management approach. Take whole of government approach to tourism industry planning. **Coordination, cooperation and communication** Opportunities exist to enhance the benefits of promotion initiatives and infrastructure services through greater coordination and interagency cooperation. Communication, community support, cooperation among agencies, clarity of roles and responsibilities. Develop support for tourism within the community and throughout local government. Improved cooperative marketing. Resolve industry fragmentation issues. **Increase profile and voice for tourism in government** **Increase government funding for tourism promotion.** **Develop events** Develop a calendar of cultural activities and events around the state. **Ensure tourism business profitability and viability** Profitability and establishment costs. Improve business skills and training standards to increase viability. Focus on higher-yielding tourism markets.

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Tourism New South Wales January, 2008 **Tourism New South Wales Surf Tourism Strategy Summary** http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib14/GDayUSA_SurfTsmStrategy_FactSheet_FINAL.pdf Key issues: 1. NSW has great beaches & good weather 2. Increases in families learning to surf 3. Opportunity to grow the surf tourism market 4. Promote surf tourism	**NSW has great beaches and good weather** **Increases in families learning to surf** **Opportunity to grow the surf tourism market** NSW accounts for one third of the Australian economy. Aim is to capitalise on the growing surf tourism market both domestically and internationally.		**Promote surf tourism** Promote surf tourism and learn-to-surf opportunities to American backpackers, families, students and even conference attendees.

Victoria

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Tourism Victoria 2002 **Victoria's Tourism Industry Strategic Plan 2002–2006** http://www.tourism.vic.gov.au/strategicplan/plan2002_2006/pdfs/complete_plan.pdf Key issues: 1. Further develop major & business events 2. Victorian Tourism Online 3. The Jigsaw brand 4. The compactness & diversity of the state 5. Easy access to a diverse range of regional products 6. Food & wine 7. Tourism industry integration & development 8. Increase visitor satisfaction 9. Australia is a safe & friendly destination 10. Marketing to the gay & lesbian market 11. Commonwealth Games 12. UK markets awareness & links to Australia 13. Melbourne's strong brand positioning 14. Melbourne as the gateway to regional Victoria 15. 24 hr operation of Melbourne airport 16. Strengths in Food & Wine 17. Shopping 18. Victoria's quality education 19. Tourism Victoria's cooperative partnerships 20. The creation of VTIC New Zealand markets	**Further develop major and business events** Melbourne is a world class destination of choice for business events. These contribute and deliver high yield economic returns to the Victorian economy. Use events to strengthen regional branding and generate activity. Support events that can develop into major events and highlight regional tourism strengths. Captialise on Victoria's volunteer strength. **Victorian Tourism Online** VTO will maximise the opportunities presented by online and internet technologies in marketing Victoria. Increase marketing of tourism by Tourism Victoria through a touring guide publication and customised touring itineraries on visitvictoria.com. **The Jigsaw brand** Recognition and consistency of the Jigsaw brand is a competitive strength. Need to further develop the brand and leverage off it. Opportunity for regions and operators to leverage from Tourism Victoria's activities through the regional Partnership Program. **The compactness and diversity of the state** **Easy access to a diverse range of regional products** **Food and wine** Victoria's primary product strengths are food and wine, natural attractions, arts and cultural heritage, events, ski. Integrate food and wine as core product strengths in all marketing strategies; promote the profile of Melbourne's pre-eminent and diverse	**Lack of 'family' market product or appeal** Relative weakness in globally competitive family product, the industry will continually seek investment in high quality infrastructure with broad family appeal including a major branded theme park. **Lack of awareness of value of tourism** Low community, business and public sector awareness of the value of tourism. **Low awareness of regional Victoria** Low international/interstate awareness of regional Victoria. **Lack of strong industry leadership—demise of Tourism Council Australia in 2000** The demise of the former peak industry organisation left an industry leadership void. There are concerns about the most appropriate and effective means of having industry issues addressed and accessing professional development, networking and marketing opportunities. The need for strong industry leadership to influence both public and private sector policy. However there has been growth in professionalism and cohesion of the industry and the opportunity this presents to develop strong industry leadership. **Increased competition** A decline in Victoria's competitive position in the business market due to competition from Asia and other states. Need to maintain Victoria's market share of increasing Asian market. Increasing competition from other entertainment and leisure activities.	**Lack of a single product strength** Creates a more complex marketing challenge. Although the state's diversity provides a competitive advantage it requires a spread of the marketing effort. There is no single hook with which consumers can associate Victoria. **Under resourced industry and regional organisations** Industry and regional organisations suffer from limited resources, competition for membership, potential duplication of services and in some cases, a lack of sustained professional leadership. This limits their ability to deal with challenges from domestic and global competition and international political events. **Poor tourism working conditions and wages** Unsocial working hours and poor pay and conditions compared to other industries. **Develop and sustain regional events** A focus is necessary on sustainability and development of existing events. There is varying capacity within regional Victoria to secure and conduct major events relevant to tourism strengths. Sydney's perceived reputation as the events capital after hosting the 2000 Olympic Games impacts on Victoria's reputation. Attention is required to ensure effective management of an event calendar to maximise benefits to Victoria. **Obstacles to Environmental tourism i.e. perceived costs, lack of knowledge, lack of understanding of concepts, lack of an evidence-based business case**

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easy & cheap air access to Victoria 21. Victoria's numerous nature based tourism strengths 22. Victoria's quality roads & road signing allows for development of touring routes product 23. The Internet 24. Technological advances 25. High quality standardised training & education 26. The Great Ocean Road strategy 27. Awareness of environmental sustainability 28. Decline in agriculture & shift towards tourism 29. Lack of 'family' market product or appeal 30. Lack of awareness of value of tourism 31. Low awareness of regional Victoria 32. Lack of strong industry leadership 33. Increased competition 34. Staff recruitment & retention 35. Tourism industry structure dominated by SMEs 36. Training & education 37. Aviation issues 38. Melbourne's expensiveness 39. Infrastructure issues 40. Lack of industry leadership 41. USA weak consumer & travel confidence 42. Weak Japanese market 43. Alpine tourism has strong	restaurant strength. **Tourism industry integration and development** **Increase visitor satisfaction** A focus on developing visitor satisfaction as a competitive strength. Align shopping experiences with the unique strengths of Victoria's regions to enhance visitor satisfaction and yield e.g. antiques, local craft markets, Surf City at Torquay. **Australia is a safe and friendly destination** **Marketing to the gay and lesbian market** Integrate gay/lesbian market opportunities in marketing programs. Maximise marketing opportunities associated with the International Gay Games and International Gay and Lesbian Travel Association Symposium. Develop pre/post touring opportunities. **The Commonwealth Games** Provide Melbourne & regional Victoria with the opportunity to raise their profile in national/international markets. **UK markets awareness and links to Australia** Mature market, strong links to Australia, high awareness of the destinations products and 50% repeat visitation. **Melbourne's strong brand positioning** **Melbourne as the gateway to regional Victoria** **24 hr operation of Melbourne airport**	**Staff recruitment and retention** **Tourism industry structure dominated by SMEs** **Training and education** There has been falling demand from school leavers for training and careers in tourism and hospitality, particularly through TAFE. This decline is in contrast to projected growth in employment opportunities. Incorporate customer service into formal training and education programs. Implement a customer service training program for events personnel. **Aviation issues** The reduced competition between the existing carriers, Qantas and Virgin Blue. The short fall in airline capacity that will occur in the less profitable regional routes. Increased direct, or same plane, air access. Rationalisation and reprioritisation of services worldwide, advances in airline technology, changing trends in booking and travel patterns, and security. The demise of Ansett. **Melbourne's expensiveness** Melbourne's accommodation is relatively more expensive than other east coast destinations. **Infrastructure issues** Victoria, like the rest of Australia, has infrastructure issues that need to be addressed. There is a lack of accommodation at the 3 and 4 star rating. **USA weak consumer and travel confidence** The long term tourism outlook for the USA is strong. However in the short term consumer confidence is low in the wake of Sept 11 and the economic climate.	**example** **Unstructured and non-accredited food and wine tourism operators** **Balance marketing activities across markets** Pursue a balanced portfolio of marketing activities across all source markets—primary, secondary and emerging —to minimise the impact of sudden political, economic and environmental changes. As well as maintaining a balance, the focus will be on target segments with the highest yield potential. **Promote benefits of tourism activity** Optimise the economic, social and environmental benefits of tourism activity in Melbourne. Promote economic viability, environmental sustainability and community benefits in product and infrastructure development. **Dynamic marketing strategies** Dynamic and rapidly growing industry, marketing strategies must be dynamic. Integrate internet marketing in strategies applicable to markets where there is high internet penetration. Respond to changing economic and social trends in Victoria's primary and secondary international markets. **Increase packaging** Package hosted accommodation with other appropriate product or experiences such as arts, theatre and cultural heritage, food and wine or tourism opportunities. **Regional Tourism planning and development** Support tourism planning integration with regional economic and community development strategic planning e.g. Great Ocean Road strategy. The potential

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competition & poor image 44. Arts, theatre & cultural heritage becoming increasingly competitive 45. Victoria not on typical backpacker routes 46. Touring routes require research & development 47. Industry composed of SMEs 48. Service quality 49. Increase investment & decrease planning issues 50. Low awareness, visitation & yield in regional areas 51. Tourism lacks integration into regional destinations 52. Community & government lack awareness of value of tourism 53. Need to develop products 54. Economic globalisation 55. Fluctuating Australian & global economy 56. Currency of regional tourism development plans 57. September 11 events lingering & long term effects 58. Intensive marketing due to diversity 59. Low awareness of regional Victoria 60. Lack of industry leadership & cooperation 61. Global warming 62. Decline in Victoria's positioning in the business market 63. Lack of a single product strength 64. Under resourced industry & regional organisations 65. Poor tourism working	**Strengths in food and wine** Dominant product strength. Source of current and future demand. Prevalence of food/wine infrastructure. Wineries offering food as a part of the cellar door experience is increasing, generating higher yield. **Shopping** Melbourne is a leader in shopping. Sydney is a major competitor. To retain dominance there is a need to focus on service excellence, training and maintain a good range of quality shopping experiences. **Victoria's Quality Education** Victoria is renowned for some of the best courses in Australia. Australia's international education market is becoming increasingly diversified, with representation from countries other than traditional Asian markets. **Tourism VICs cooperative partnerships** A key success factor in Victoria's competitiveness since 1992 has been the strong co-operative partnership between Tourism Victoria as the government's lead tourism agency and the industry. **The creation of VTIC** **New Zealand markets easy and cheap air access to Victoria** **Victoria's numerous nature based tourism strengths** **Victoria's quality roads and road signing allows for development of touring routes product** **The internet – opportunity for competitive advantage** Encourage industry to reduce use of printed collateral. Investigate opportunities	**Weak Japanese Market** Mainly due to weak national advertising that does not sell Victoria appropriately. **Alpine tourism has strong competition and poor image** Victoria's alpine areas have strong competition from NZ, Canada and NSW. Competition also exists with destinations that have warm climates during Victoria's ski season. Consumer perception is that alpine visitation in Victoria is expensive. There is limited access to transport for independent travellers and a lack of tourism product outside the ski season. **Arts, theatre and cultural heritage becoming increasingly competitive** **Victoria not on typical backpacker routes** **Touring Routes require research and development** Routes that link Melbourne with touring destinations need to be developed and the issues of sustainability considered. There is a lack of understanding about how the various market segments perceive the concept of touring and a current lack of research about the value of touring routes **Industry composed of SMEs** Small marketing budgets, which limits their ability to market appropriately. **Service Quality** Professionalism and standards vary widely and there is a reluctance to participate in accreditation programs. Variable delivery of quality products and services **Increase investment and decrease**	contribution of tourism to community renewal in regional centres. **Increase consumer marketing** Increase the ratio of consumer marketing to trade marketing, particularly in more mature markets. **Shift to marketing primary motivators for travel** Progressively shift from marketing product regions to marketing the primary motivators for travel i.e. desired experiences, destinations and attractions. **Target cruise line operators** Develop marketing initiatives specifically targeted at cruise line operators to ensure Melbourne and Victoria remain an integral part of cruise ship itineraries. **Cooperative marketing** Although Victoria's diversity provides a competitive advantage, it requires an integrated spread of cooperative marketing effort. With more and more non-traditional businesses such as media and online retailers playing important roles in the tourism distribution chain, Tourism Victoria and the industry need to investigate possible co-operative marketing opportunities with non-traditional partners. Tourism Victoria will continue to enhance partnerships with media such as Channel Nine's Postcards program, and other business sectors such as global credit card companies. Encourage alliances and cooperative marketing partnerships between tourism operators, tourism associations, marketing committees, local government and others. Integrate the promotion of Victoria's leading natural attractions in regional and national and

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conditions & wages 66. Develop & sustain regional events 67. Obstacles to environmental tourism i.e. perceived costs, lack of knowledge, lack of understanding of concepts, lack of an evidence-based business case example 68. Unstructured & non-accredited food & wine tourism operators 69. Balance marketing activities across markets 70. Promote benefits of tourism activity 71. Dynamic marketing strategies 72. Increase packaging 73. Regional tourism planning & development 74. Increase consumer marketing 75. Shift to marketing primary motivators for travel 76. Target cruise line operators 77. Cooperative marketing 78. Grow & develop nature based 79. Strengthen relationships with ITOs 80. Major events i.e. Commonwealth Games 81. Leverage product strengths i.e. events, festivals, food & wine, touring, nature based, alpine/ski , arts, theatre & cultural heritage , backpackers, shopping, touring , accommodation,	for online information provision and distribution, and media and business partnerships. Develop and enhance the levels of understanding and uptake by Victoria's tourism industry in online and e-commerce opportunities. Improve efficiencies within the tourism distribution chain. **Technological advances** Due to technological advances there is a move towards interactive television and development in mobile hardware e.g. third generation satellite mapping in cars, Internet uptake, interactive television, introduction of mobile technology, technological advances in vehicles and equipment, such as satellite mapping systems in cars. Increased use of the internet by consumers and businesses. Opportunities for increased participation in equipment-based adventure activities. Faster and more comfortable transport is increasing the accessibility of regional areas. The tourism industry is highly suited to online technologies. While regional air servicing in the past has been hampered by high costs, the move into new technology is likely to assist new niche operators into regional centres. **High quality standardised training and education** Many options for quality training and education in Victoria i.e. universities, TAFE or private training providers, traineeships and workplace assessment through ACCESS. Recognised within the Australian Qualifications framework. Competency standards for tourism and hospitality were implemented in 2000. Need to highlight the critical skills and	**planning issues** Address planning issues relevant to tourism. Provide greater flexibility in planning schemes for ancillary tourism uses. Identify infrastructure and destination development issues that impact on tourism. Seek investment in the industry and the region. **Low awareness, visitation and yield in regional areas** **Tourism lacks integration into regional destinations** Lack of integrated, holistic and sustainable destination development and poor integration of tourism into regional development initiatives **Community and government lack awareness of value of tourism** There is a need to clearly articulate the economic, social and environmental benefits of tourism. Variable levels of support from local government **Need to develop products i.e. gaps and no key product** Lack of product development for international markets. Product supply gaps in accommodation, services, attractions and restaurants. The lack of singular product strength. **Economic globalisation** In todays global economy, international boundaries have been reduced. The rise of e-commerce, together with globalisation will continue to expose the Victorian tourism industry to global markets. **Fluctuating Australian and global economy** Fluctuations in the value of the Australian	international marketing programs. Develop cooperative marketing programs such as Bed and Breakfast and Getaway. Respond strategically and creatively to growing levels of competition. **Grow and develop nature based** Need to raise consumer and community awareness, increase participation of regional communities in the protection of natural resources and the development and maintenance of a viable regional tourism industry. **Strengthen relationships with ITOs** Strengthening communication and relationships with the key ITOs will also be an integral part of the strategy given their importance in this market. Competition between ITOs has introduced a degree of price sensitivity. Traditional itineraries include up to five cities covering the east coast of Australia. **Major Events i.e. Commonwealth Games** Use events to strengthen regional branding of destinations and generate tourism-related activity. Support specific regional events with the capacity to become major events. Capitalise on VIC's volunteer strength and implement a customer service training program for all Commonwealth Games personnel. **Leverage product strengths i.e. events, festivals, food and wine, touring, nature based, alpine/ski , arts, theatre and cultural heritage , backpackers, shopping, touring , accommodation, golf** **Focus on visitor satisfaction as a competitive strength**

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golf 82. Focus on visitor satisfaction as a competitive strength 83. Grow secondary product strengths i.e. education, built attractions, gay & lesbian, cruise shipping & Indigenous tourism 84. Asian currency recovery 85. Research niches, motivations & trip cycles 86. Research into impact, cause & effect 87. E-commerce 88. Polarisation of wealth 89. Rising unemployment 90. Develop appropriate, sensitive & sustainable visitor infrastructure 91. Need increased operator participation in accreditation, training & education 92. Grow & develop Indigenous tourism 93. Grow & develop the Chinese tourism market	competencies required in the future. Need to ensure that education and training remains relevant to industry. Monitor and report on training needs, skill gaps and standards of training. **The Great Ocean Road strategy** 20-year strategic plan for the Great Ocean Road corridor that guides economic, community and environment planning. **Awareness of environmental sustainability** Increased awareness and interest in environmental/ecological sustainability. Increased interest in natural attractions and increased international and domestic interest in nature based tourism. **Decline in Agriculture and shift towards tourism** The continuing economic shift from traditional to service based industries. Farming is losing its position as the primary industry of most rural economies. Decreasing farm profitability and labour efficiencies from agricultural technology and mechanization have changed rural employment.	dollar and world fuel prices significantly impact on the Victorian tourism industry. With the value of the Australian dollar relatively low, Australia and Victoria become an increasingly attractive destination for both international and domestic travellers. **Currency of regional tourism development plans** **September 11 events lingering and long term effects** In light of the events of September 2001, the aviation industry remains a dynamic sector. Greater focus caused by terrorism has highlighted the depth of tourism influence on economies and communities **Intensive marketing due to diversity** Although Victoria's diversity provides a competitive advantage, it requires a spread of the marketing effort. It also makes it difficult to have a single image with which consumers associate the state. **Low awareness of regional Victoria** International and interstate awareness of regional Victoria is low. Success achieved in marketing Melbourne needs to be mirrored in regional Victoria. **Lack of industry leadership and cooperation** Effort needs to be directed to small organisations amalgamating part or all of their operations. Variable strength of industry leadership and appropriate structures.	**Grow secondary product strengths i.e. education, built attractions, gay and lesbian, cruise shipping and Indigenous tourism** **Asian currency recovery** **Research niches, motivations and trip cycles** **Research into impact, cause and effect** Cause and effect research. Identify the impact of tourism at local, regional and state levels. **E-commerce** **Polarisation of wealth** **Rising unemployment** A decline of traditional industries and increasing unemployment, resulting in a need to diversify the economy and provide tourism and hospitality jobs. **Develop appropriate, sensitive and sustainable visitor infrastructure** **Need increased operator participation in accreditation, training and education** Encourage and facilitate specific training and education participation. Liaise with training providers and industry to ensure relevant training programs are available. Assist in the identification of training and professional development needs. Develop a range of educational and training programs such as seminars, workshops, forums, discussion groups and

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		Global warming Resulting in climate change, particularly in the snowfields, coastal areas and semiarid zone. Global climate changes could also affect snowfalls in the long term. **Decline in Victoria's positioning in the business market** Due to competition from Asia and other states. This market is important. Competitive destinations need to place more emphasis on facilitating appropriate infrastructure and marketing activity. Parts of Asia (i.e. Singapore) are becoming more aggressive in attracting the business market.	networking opportunities for operators. **Grow and develop Indigenous tourism** The strength of Victoria's emerging Aboriginal tourism segment based on unique heritage and non-stereotypical contemporary experiences, offers a great opportunity. International visitors have a great interest in Aboriginal culture. There is a lack of cohesion and mentoring within Victoria's Aboriginal tourism industry and insufficient businesses ready for promotion through the travel industry, particularly at the international level. Need to increase awareness of Victoria's Aboriginal heritage and culture, develop and distribute Aboriginal tourism experiences and support development of co-operative marketing initiatives. **Grow and develop the Chinese tourism market** Rapidly growing market. Market is immature and needs development i.e. raise awareness and increase the desirability of Victoria as a destination. There is a scarcity of quality Chinese language guides is an issue.
Tourism Victoria 2002 **The Significance of Tourism Strategic Plan 2002-2006** http://www.tourism.vic.gov.au/strategicplan/plan2002_2006/pdfs/section2.pdf Key issues: 1. Provides diverse range of employment opportunities 2. Provides regional employment opportunities 3. Develop Indigenous tourism	**Provides diverse range of employment opportunities** Tourism is a labour intensive industry that provides many full time and part time employment opportunities across a range of skill areas. **Provides regional employment opportunities** Being relatively decentralised, it provides jobs that keep people in regional areas with flow on benefits for community life and economics stability.	**Tourism not seen as valuable by government, business sector or community** A Number of issues and barriers have influenced the ability to sell the value of tourism such as the ability to define the industry and its influence on other sectors such as retail. **Lack of good strategic planning** Tourism creates jobs, export earnings and social cohesion, but traditional economic and social development strategies have failed to understand and identify these opportunities.	**Need to raise awareness of value of tourism** Raise awareness of the significance of tourism to key stakeholders, contribute to the conservation and enhancement of the states unique natural and cultural values, support and involve local communities and their culture. **Need to raise awareness of sustainable environmental tourism** Raise awareness of environmental issues and stimulate tourists to advocate for conservation through education and

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4. Tourism not seen as valuable by government, business sector or community 5. Develop international relations 6. Businesses need to adopt sustainable tourism practices 7. Continuing shift from traditional primary industries to service & knowledge based industries 8. Terrorism & airline crises 9. Need to raise awareness of value of tourism 10. Events used as a way to develop regional & state economies 11. Cause & effect research at the local, regional & state levels	**Develop Indigenous tourism**	**Develop international relations** There is opportunity to further develop ties with nations such as Italy, Greece, China and other Asian countries. **Businesses need to adopt sustainable tourism practices** The key challenge is for tourism businesses in all parts of the industry to adopt ecologically sustainable practices in their day to day operation. **Continuing shift from traditional primary industries to service and knowledge based industries.** Farming is losing its position as the primary industry of most rural economies. Decreasing farm profitability and labour efficiencies from agricultural technology and mechanisation have changed rural employment. **Terrorism and airline crises**	interpretation. Environmental appreciation can in turn enhance visitor enjoyment. An environmental benefit of tourism is that it provides the opportunity to communicate the value of natural and built heritage and of cultural inheritance to residents. There are perceived costs of adopting environmentally sustainable practices and a lack of knowledge about how to manage environmental performance effectively. **Events used as a way to develop regional and state economies** **Cause and effect research at the local, regional and state levels**
Tourism Victoria 2003 **Victoria's Tourism Industry Strategic Plan 2002–2006 Addendum 2003** http://tourism.vic.gov.au/strategicplan/plan2002_2006/addendum_oct_03.htm Key Issues: 1. Struggling Japanese market 2. Government policies 3. Commonwealth 10 year strategy 4. Terrorism, SARs & the Iraq war		**Struggling Japanese market** Growth in 2004 reflects the severe decline in 2003, the effect of 'pent-up' demand as a result of weak outbound tourist activity in recent years and strengthened marketing campaigns. **Government Policies** **Commonwealth 10 Year Strategy** **Terrorism, SARs and the Iraq war** **Economic conditions—global slowdown**	**Focus on domestic markets that deliver sustainable growth, increased visitor activity and benefits to regional areas of Victoria** Investigate a regional renewal program that will integrate marketing and industry and infrastructure development **Boost international marketing** To raise Victoria's profile as a desirable tourist destination. **Aggressively market Victoria's attractions**

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5. Economic conditions 6. The tendency to work longer hours 7. Increased competition for Australia's remaining leisure time 8. Stagnant domestic tourism 9. Focus on domestic markets that deliver sustainable growth, increased visitor activity & benefits to regional areas of Victoria 10. Boost international marketing 11. Aggressively market Victoria's attractions 12. Support the marketing of the Commonwealth Games 13. Develop research		**The tendency to work longer hours** **Increased competition for Australians' remaining leisure time** **Stagnant domestic tourism**	**Support the marketing and promotion of the 2006 Commonwealth Games** **Develop research**
Tourism Victoria 2004 **Victoria's Tourism Industry Strategic Plan 2002–2006 Addendum 2004** http://tourism.vic.gov.au/strategicplan/plan2002_2006/addendum_oct_04.htm Key Issues: 1. 'Jigsaw' brand 2. Yarra Valley 3. Jetstar headquarters & operation 4. Avalon Airport 5. New convention centre 6. Struggling Japanese market 7. Government policies	**Highly successful Jigsaw brand and marketing campaign** **Yarra Valley is close to Melbourne and the state's key wine and food destination** **Victoria is seen as stylish and sophisticated** **Jetstar headquarters and operation** Victorian Government secured the headquarters of Jetstar for Victoria, with the carrier commencing services in May 2004. **Avalon Airport—Melbourne was the first Australian city with a second major domestic airport**	**Struggling Japanese market** Japanese arrivals to Australia suffered severe declines in 2003, as a result of weak outbound tourist activity in recent years largely attributable to SARs. **Government policies** **Inflation, exchange rates and economic growth** **International political instability, war (Iraq), terrorism and global health issues (i.e. SARS)** **Fluctuating world economy and consumer confidence**	**Develop marketing** Additional marketing strategies for international markets. **Increase international (and domestic) airline services.** **Enhance regional tourism and events** Develop strategies to enhance regional tourism. Support regional and major events. **Promote investment in tourism infrastructure** **Focus on food and wine tourism**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
8. Inflation, exchange rates & growth 9. International political instability, war, terrorism & global health issues 10. Fluctuating world economy & consumer confidence 11. Develop additional marketing strategies for international markets. 12. Increase airline services. 13. Enhance regional tourism & events 14. Investment in tourism infrastructure 15. Focus on food & wine tourism 16. The 2006 Commonwealth Games 17. Raise profile of Tourism Victoria & communicate the value of tourism 18. Further develop & expand research	**New convention centre development—largest in Australia, adjacent and connected to the existing Melbourne Exhibition Centre** The entire development will result in a world-class, integrated conference precinct, and will include the development of surplus land in the area for compatible uses, such as a hotel, restaurants and retail outlets.		**The 2006 Commonwealth Games—marketing** **Raise the profile of Tourism Victoria and develop strategies to communicate the value of tourism to a range of stakeholders** **Further develop and expand research**
Victoria Tourism Industry Council and Victoria Events Industry Council 2006 **Tourism and Events Strategy 2016** http://www.vecci.org.au/resources/tourism+and+events+strategy+2016.pdf Key issues: 1. Grow environmental sustainability & nature based tourism 2. Develop aviation 3. Cheaper flights assist price competition 4. Support new infrastructure & attract investment 5. Attract & retain events 6. Tourism product	**Grow environmental sustainability and nature based tourism** **Develop aviation i.e. Avalon airport, Melbourne airport expansion** **Cheaper flights assist price competition between tourism and other discretionary consumer goods** **Support new infrastructure and attract investment** **Attract and retain events** **Focus on tourism product development to match strong marketing campaigns** **Improve packaging and delivery of tourism products to consumers**	**Low cost carriers are a challenge to the industry** **Aviation development delays—need for more liberalised Australian Aviation sector** **Events in Melbourne highly seasonal in the past** **Changing consumer preferences** **Economic factors—relative exchange rates & fuel costs** **Green house gas emissions** **Need to adapt to a carbon-constrained economy**	**Research tourism industry's environmental impacts** Compare to other industries. Investigate carbon emissions, waste production, water & energy use. **Research into tourism customer expectations, satisfaction & loyalty** **Improve aviation access and transport networks** **Develop and promote an events calendar** **Need community leadership for infrastructure development foster business and service excellence** **Develop a database of preferred**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
development to match strong marketing campaigns 7. Improve packaging & delivery of tourism products to consumers 8. 'Carbon managed' economy 9. Tourism cooperation & cohesion 10. Low cost carriers are challenging 11. Aviation development delays. Need liberalised Australian aviation sector 12. Events in Melbourne highly seasonal 13. Changing consumer preferences 14. Exchange rates & fuel costs 15. Green house gas emissions 16. Need to adapt to a carbon-constrained economy 17. Climate change 18. national skills shortages 19. Lack of policy alignment between tourism & planning 20. Research tourism industry's environmental impacts 21. Research into tourism customer expectations, satisfaction &loyalty 22. Improve aviation access & transport networks 23. Develop & promote events calendar 24. Community leadership for infrastructure development 25. Foster business & Service excellence 26. Develop a database of	**'Carbon managed' economy** **Competitive advantage: tourism cooperation & cohesion**	**Climate change** A significant challenge, which the tourism industry must recognise and prepare for. Particularly important to Australia as it is a long haul destination. A proactive and collaborative approach is required and should include practical advice and plans to manage emerging risks and promote new opportunities. **National skills shortages** **Deinstitutionalise training and development** Should be deinstitutionalised to provide recognition for on-the-job training and experience as well as local or technology driven delivery. **Lack of policy alignment between tourism and planning** A lack of alignment between government tourism policy objectives and planning policy and reported difficulties negotiating the current state planning schemes.	**tourism trainers** **Attract skilled employees to the industry** **Improve skills of existing employees** **Identify training gaps** **Coordinated risk management when dealing with external shocks** **Increase industry leadership and participation** Increase the participation of tourism businesses in representative organisations and strong industry leadership. Industry's ability to lobby and influence key decision makers on major tourism issues (e.g. aviation policy, infrastructure development) and its ability to influence national tourism marketing campaigns. **Flexible training and development to increase skills** **Deliver an 'authentic' experience to visitors** **Increase business participation and collaboration** Encourage the industry to collaborate, share knowledge and expertise and successfully lobby government and industry associations should investigate value added collaborative membership. **Investment in infrastructure i.e. new boating infrastructure, upgrading existing ageing infrastructure** **Decentralise industry activities and deliver outcomes within local areas to encourage participation**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
preferred tourism trainers 27. Attract skilled employees to tourism 28. Improve skills of existing employees 29. Identify training gaps 30. Coordinated risk management 31. Increase industry leadership & participation 32. Flexible skill training & development 33. Deliver 'authentic' experience 34. Increase business participation & collaboration 35. Investment in infrastructure 36. Decentralise industry activities & encourage local participation			
Department of Innovation, Industry and Regional Development October, 2006 **Tourism and Events Industry Strategy** http://www.diird.vic.gov.au/corplivewr/_assets/main/lib60026/tourism-strat.pdf Key issues: 1. Leading provider of international education, strong tertiary education sector, grow international education from Asia & Europe 2. Increased focus on investment for growth by making tourism & events a priority in infrastructure planning & investment	**Leading provider of international education, strong tertiary education sector, grow international education from Asia and Europe** **Increased focus on investment for growth by making tourism and events industry a higher priority in infrastructure planning and investment attraction.** **The Jigsaw campaign** Distinctive, consistent and well targeted advertising. Highlights Victoria's diversity within a compact area, has been a long-term success and has won international praise. **Lifestyle experiences i.e. Melbournes' culture** Victoria has unique and authentic lifestyle	**Increased competition** Global competition in tourism marketing is increasing, competition for major events and business events is increasing, Victoria's position not strong in the national marketing effort. **National marketing not benefiting states** Victoria's strengths have not been adequately represented in recent national tourism marketing campaigns, which tend to concentrate on Australia's iconic natural landmarks. Can campaigns that ask "So where the bloody hell are you?", for instance, attract travellers to Victoria's wineries and Melbourne's shopping and food precincts? Further cooperation with Commonwealth tourism bodies is needed to ensure VICs attributes are reflected in national marketing and branding strategies.	**Tourism policy and decision making development** Advocacy on industry issues of national importance. A tourism and events strategy and policy unit provide industry with a single access point into government. It will coordinate research, monitor and evaluate strategies and liaise with other tiers of government on tourism and event related issues. Improve strategy development & enhance policy advice to the Minister for Tourism. Increased consideration of tourism and events in government decision making by linking and integrating government activities. Give the industry a louder and more effective voice within government. **Increase the Asian market** Improve marketing and tourism product; increase direct flights from key Asian

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
attraction 3. The Jigsaw campaign 4. Lifestyle experiences 5. regional tourism 6. Develop major & business events 7. Chinese market development 8. Increase industry communication, networking & collaboration 9. Create a larger & more highly trained tourism workforce 10. Accreditation i.e. online, sustainable tourism, ecotourism 11. Improve communication between industry & trainers & educators 12. Increase skilled workers through training & education 13. Promote tourism career pathways & opportunities 14. Increased competition 15. national marketing not benefiting states 16. Key markets are under threat 17. Changes in consumer preferences & spending patterns 18. Tourism policy & decision making development 19. Increase the Asian market 20. Take a 'destination management' approach 21. Work with community on environmental & planning issues 22. Aviation 23. Use new & innovative	experiences. Melbourne is ranked as the lead Australian city associated with theatre, shopping, world class restaurants, cafes, bars and nightlife. It is synonymous with style, romance, culture and sophistication. **Regional tourism—compact, diverse, good roads** **Develop major and business events** **Chinese market development** **Increase communication, networking and collaboration** Strengthening information flows, linkages and networks between tourism agencies, institutions and businesses. Collaboration between the Government's tourism agencies and its many natural and cultural institutions such as national parks, zoos, galleries and museums. **Create a larger and more highly trained tourism workforce** **Accreditation i.e. online accreditation, sustainable tourism and ecotourism accreditation** **Improve communication between industry and trainers and educators** **Need to increase the availability of skilled workers** **through training and tourism education** As tourists demand more sophisticated and varied experiences, demand for skilled employees is going to increase. Quality service is vital for repeat business. **Promote tourism career opportunities and pathways i.e. implement the Tourism Excellence Program**	**Key tourism markets are under threat** On the domestic tourism front, a range of factors such as increased fuel prices, low cost carriers and increased competition from overseas destinations have contributed to a national decline in domestic tourism. **Changes in consumer preferences & spending patterns**	locations; develop culturally appropriate experiences; target high yield segments; Invest in appropriate infrastructure such as interpretative signage; Language skills of industry operators; Improve Australian visa processing and visa access points; and connect with emerging free trade agreements. **Take a 'destination management' approach** To improve access to and response from Government, higher levels of investment in infrastructure and better service delivery and regulation; improve coordination across different agencies and tiers of government; provide better infrastructure, balancing the needs of the industry and the community with attention to environmental sustainability. **Work with community on environmental & planning issues** **Aviation—growth in direct flights, attract more flights** Victoria has increased the number of international airlines flying directly to Melbourne. International aviation policy & development has been a priority. Avalon and Melbourne Airports' curfew-free status & Melbournes' capacity to attract the A380 Jet are advantages. **Use new & innovative mobile, multimedia & online technologies in marketing, improve online presence & work with industry to develop online capabilities**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
mobile, multimedia & online technologies in marketing, improve online presence & work with industry to develop online capabilities **24.** Apply best practice environmental models	Increase Victoria's tourism workforce, develop career pathways and raise skill levels. Develop a Workforce Development Plan.		**Apply best practice environmental models** Investigate best practice environmental models that exist in Canada & New Zealand to apply them to Victoria.
Tourism Victoria 2007 **Tourism Victoria Business Plan 2008–2011** http://www.tourism.vic.gov.au/images/stories/3yearplan.pdf Key issues: 1. Improve tourism decision making 2. Focus on strengths 3. Improve the branding & marketing 4. Major & business events acquisition 5. Attract & facilitate investment in product & infrastructure 6. Skills & service standards 7. Third generation customer conversion 8. regional destination management 9. Build synergies between tourism & international education 10. Coordination & policy advocacy 11. Communication, coordination & whole of government approach 12. Aviation policy 13. Approved destination status scheme 14. Adequate access to key markets 15. Nature-based tourism	**Improve tourism decision marking – review industry structure and create tourism strategy and policy division** Aims to place tourism at the forefront of government decision making on economic, social and environmental issues. Ensure that tourism interests are adequately considered in government infrastructure planning. Enhance the provision of tourism related policy advice **Focus on Victoria's product strengths:** • **food and wine** • **arts, theatre and culture** • **spa and wellbeing** • **skiing** • **nature-based** • **touring** • **Indigenous** • **golf** • **shopping** • **accommodation** • **events** • **education** • **built attractions** • **adventure** **Improve the branding and marketing of Victoria** **Major and business events acquisition** **Attract and facilitate investment in product and infrastructure development** Tax & regulation reforms, integrate	**Nature-based tourism** Implement strategy to promote ecotourism, adventure tourism, Indigenous tourism and trails. Identify opportunities for tourism facilities upgrade **Increase community and government advocacy for tourism development across regional Victoria** **Climate change**	**New marketing technologies** **Increase Victoria's product promotion on the internet** **Increase online capabilities of regional operators** **Research current perceptions of tourism development in regional Victoria** **Research and develop educational and experiential products to attract the Japanese education market** **Environmentally sustainable nature based tourism infrastructure guidelines** **Attract and retain a skilled tourism labour force** **Victoria's Tourism Excellence program—aims to improve standards, service quality, career pathways and skill levels** **Sustainable tourism—promote industry standards & accreditation i.e. Green Globe 21** **Develop a Workforce Development Plan that focuses on addressing the needs of growing Asian markets.**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
16. Increase community & government advocacy for tourism development across regional Victoria 17. Climate change 18. New marketing technologies 19. Increase internet product promotion 20. Increase online capabilities of regional operators 21. Research perceptions of tourism development in regional Victoria 22. Research & develop educational products to attract the Japanese 23. Guidelines for environmentally sustainable nature based tourism infrastructure development 24. Attract & retain skilled labour 25. Victoria's Tourism Excellence program 26. Sustainable tourism 27. Develop a Workforce Development Plan 28. Communicate Crisis Management Handbook to handle external shocks 29. Grow the VFR market 30. Support & distribute investment 31. Support & distribute market research	tourism priorities with broader infrastructure opportunities & strategies. Invest in accommodation in regional VIC, adventure and nature based tourism activities, the Great Ocean Road **Skills and service standards** **Third generation customer conversion** **Regional destination development through a destination management approach** **Build synergies between tourism & international education** **Coordination and policy advocacy** **Communication, coordination and whole of government approach** **Aviation policy i.e. bilateral airline approvals, fuel efficient aircraft development, CO2 offset schemes, influence policy by developing relations with federal bodies (DoTARS).** **Approved Destination Status scheme** **Adequate access to key markets i.e. China and India**		**Communicate the Crisis Management Handbook to help with external shocks** **Grow the visiting friends and relatives market** **Support and distribute investment** **Support and distribute market research**

Queensland

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Tourism Queensland 2008 **Queensland Tourism Industry Strategy** http://www.tq.com.au/tqcorp_06/index.cfm?E98B24EA-BF4E-9693-F458-46147C183D91 **Key issues:** 1. Coordination, partnerships & community engagement 2. Plan for & increase investment, infrastructure & access 3. Brand marketing 4. Develop arts & cultural sector 5. Tourism significantly contributes to the Queensland economy 6. Queensland perceived as a safe destination 7. Aviation 8. Prospect of global political instability/safety & health risks overseas 9. Emerging travel markets in developing countries will influence travel demand & create new business opportunities 10. Increase in worldwide use of new technology, changing distribution systems, direct marketing, use of media & booking systems 11. Grow & develop indigenous tourism 12. Climate change, high awareness of environmental sustainability. Develop sustainable tourism benchmarking/accreditation 13. Increasing competition, stagnant international market share & a national decline in domestic tourism 14. Changes in transport & access—need to further improve access 15. Travel choice & behaviour	**Coordination, partnerships and community engagement** Need to enhance regional tourism delivery, adopt whole of government approach, engage with the community in tourism planning, engage with local government and risk management. **Plan for and increase investment, infrastructure, access/route development** Establish a 'Tourism Investment Attraction Group'. Population growth in South East Queensland driving infrastructure development. But lack of investment in tourism i.e. in new serviced accommodation, new product, services and niche experiences. **Brand marketing** **Develop arts and cultural sector** Build awareness in arts and cultural organisations of the drivers and constraints of tourism, build marketing, service and management capacity of arts and cultural organisations and increase collaboration between arts and tourism industry operators. **Tourism significantly contributes to the Queensland economy** **Queensland perceived as a safe destination** **Aviation—increased services, low cost air travel, innovation in transport technology** Increase range, speed, comfort and safety of travel. **Prospect of global political instability/safety and health risks overseas means possible boost to domestic and inbound visitation** **Emerging travel markets in developing**	**Climate change, increased awareness of environmental sustainability and need to develop sustainable tourism benchmarking and accreditation** Major issue. Affects on the Great Barrier Reef. Need Action Plans to develop strategies for climate change adaptation. **Increasing competition, stagnant international market share and national decline in domestic tourism** **Changes in transport and access—need to further improve access** **Travel choice and behaviour changing—due to fluctuating economies, changing demographics, family structures, labour market, holiday lengths and increasing consumer expectations (i.e. desire for specialised/customised holidays)** **September 11, SARS, the war in Iraq and terrorism resulting in greater consumer consciousness of destination safety, security and health issues** **Lack of recognition of value and support for tourism—need to strengthen tourism industry's collective voice** **Need to improve business enterprise and viability and reduce government regulations and compliance costs** **Shortages of skilled staff creating weaknesses and variability in service and product standards/quality** **Competition from other industries for**	**Develop language skills and cultural understanding** **Ensuring regional delivery and uptake of skilling and employment programs** **Implement crisis management plans to mitigate the impact of shocks** **Develop climate change and environmental indicators** **Fluctuating global economies and variable exchange rates** **Variable and increasing fuel prices will influence transport supply and demand** **regional economic agreements will facilitate travel within trade zones** **Rising operating costs and overheads affect the viability of tourism businesses.** **Consumers will access tourism content from a wider range of mediums** **Tourism Research and Development Futures strategy** Enhance research, development, and entrepreneurial culture. Identify the key innovation & technology drivers for the industry, encourage industry investment in research & development & enhance industry uptake of innovative solutions. **Investigate alternative research approaches, i.e. the use of customised modelling, scenario planning, and supply and demand modelling** **Investigate establishing a technology**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
changing 16. September 11, SARS, the war in Iraq & terrorism resulting in greater consumer consciousness of destination safety, security & health 17. Lack of recognition of value & support for tourism 18. Need to improve business enterprise & viability & reduce government regulations & compliance costs 19. Shortages of skilled staff creating weaknesses & variability in service & product standards/quality 20. Competition from other industries for staff, perceived limited career paths & lack of skills development 21. Growth in outbound travel 22. Protected areas tourism management—manage visitor impacts, invest in infrastructure & boost resources to ensure appropriate development 23. Levels & quality of tourism planning at local government level vary 24. Lack of role clarity/coordination in industry & across federal, state & local governments 25. Infrastructure may not be keeping pace with tourism & population growth: negatively affecting tourism 26. Tourism impacts on the natural environment & natural disaster impact on tourism 27. Falling quality of natural resources & attractions 28. Innovation in technology could move quicker than tourism industry 29. Lack of a strong tourism voice in government planning & policy 30. Population & visitor growth putting pressure on public infrastructure & tourism product	**countries (i.e. China & India) will influence travel demand & create new business opportunities** **Grow and develop Indigenous tourism**	**staff, perceptions of limited career paths and lack of skills development** **Significant growth in outbound travel** **Protected areas tourism management - manage visitor impacts, invest in infrastructure & boost resources to ensure appropriate development** Conduct a state-wide Tourism in Protected Areas seminar to discuss and resolve tourism and protected area management issues. **Levels and quality of planning for tourism at local government level vary** **Lack of role clarity and coordination between industry & government & across federal, state & local governments infrastructure may not be keeping pace with growth and adversely impacting on tourism** **Tourism impacts on the natural environment and natural disasters impacts on tourism** **Falling quality of natural resources and attractions** **Innovation in communication technologies could move quicker than industry can match** Some possible technological changes: mobile phones used to plan & organise holidays, high-definition televisions & computers used for virtual tourism visits **Lack of a strong tourism voice in government planning and policy forums** **Population and visitor growth putting pressure on public infrastructure and tourism product**	**incubator** **Research—understand and quantify the economic value of tourism in order to attract investment and support decision making** **Retain staff by providing flexible work-based training solutions and clearly defined career opportunities** **Encourage regional Queensland, remote communities and disadvantaged sections of the labour force to participate in the tourism industry** **Improve skill levels, retain staff and increase labour supply, ensure content of skills development programs are adaptable and responsive to industry needs** **Destination management approach** **Need to build industry's research capacity—need more timely, accurate and reliable regional data** **Research needs to be looking forward and strategic, and should investigate economic impacts, costs and benefits of tourism & enhance appreciation of the economic contribution of tourism**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
31. Higher expectations of product & service quality 32. Low cost air travel & implications for outbound travel & drive destinations 33. Marketing fragmentation 34. Consumers demanding diversity & customisation of tourism product 35. Worldwide standardised security measures will increase airfares 36. Environmental & social awareness 37. Natural disasters & geo-political events affect travel behaviour 38. Baby boomers retirement 39. Accumulating leave entitlements 40. Increased price sensitivity 41. Changing demographics, holiday durations & patterns 42. Tourism has a significant 'carbon footprint' due to greenhouse gas emissions from aviation 43. Develop language skills & cultural understanding 44. Ensuring regional delivery & uptake of skilling & employment programs 45. Implement crisis management plans to mitigate impact of shocks 46. Develop climate change & environmental indicators 47. Fluctuating global economies & variable exchange rates 48. Variable & increasing oil & fuel prices will influence transport supply/demand 49. Regional economic agreements will facilitate travel within trade zones 50. Rising operating costs & overheads affect viability of tourism businesses 51. Consumers will access tourism content from more mediums		**Higher expectations of product and service quality** **Low cost air travel and implications for outbound travel and drive destinations** **Marketing fragmentation due to multiple destinations and niche markets** **Consumers demanding diversity and customisation of tourism product** **Security measures will be standardised around the world and their cost will increase airfares** **Increasing environmental and social awareness** **Natural disasters and geo-political events affect travel behaviour** **Baby boomers retirement —will shape demand and change labour market** **Trend towards the accumulation of leave entitlements** **Increased price sensitivity** **Changing demographics, holiday durations and patterns** **Tourism has a significant 'carbon footprint' due to greenhouse gas emissions from aviation**	

Document Details	**Strengths and Opportunities**	**Challenges**	**Recommendations and Strategies**
52. Tourism research & development futures strategy 53. Investigate alternative research approaches 54. Establish a technology incubator 55. Research 56. Retain staff 57. Encourage disadvantaged sections and regional/remote labour force to participate in industry 58. Improve skill levels, retain staff, increase labour supply, ensure content of skills development programs are adaptable to industry needs 59. Destination management 60. Build research capacity 61. Research needs to be looking forward & strategic			

South Australia

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
South Australian Tourism Commission December, 2002 **South Australian Tourism Plan 2003–2008** www.tourism.sa.gov.au Key issues: 1. Desire for authentic community based tourism 2. The Murray River—a strength & a management issue 3. Improve accessibility to/within SA 4. Need for industry & government leadership for tourism 5. Capitalise on sporting infrastructure 6. SA has strengths in history & heritage that are influenced by religion & politics 7. Develop & grow Indigenous tourism 8. Focus on key product strengths 9. Strengths in tourism planning 10. Develop secondary strengths 11. Increase marketing productivity—target high-yield, disperse the benefits to the regions & take a collaborative approach 12. Whole-of-government approach 13. Commonwealth Government's 10 year tourism plan 14. Strengthen towns as 'hubs'	**The desire for authentic community based tourism** **The Murray River** A crucial natural resource management issue facing Australia. SA is dependent on it for water, food, recreation and leisure. **Improve accessibility to/within SA** **Need for industry and government leadership for tourism** **Capitalise on the state's sporting infrastructure** **SA has strengths in history and heritage that are influenced heavily by religion and politics** **Develop and grow Indigenous tourism** **Focus on key product strengths** Adelaide; authentic nature-based experiences such as Kangaroo Island and the outback; wine and food, beaches; its world-class fishing and boating; diverse marine life and quality seafood**.** **Strengths in tourism planning** **Develop secondary strengths** Business incentives, education, health, shopping, house boating, the cruise market, rail journeys, sport, cycling, bushwalking, the dive market, bird watching, botany and spiritual tourism. **Increase marketing productivity—target high-yield, disperse the benefits to the regions and take a collaborative approach** **Take whole of government approach**	**Environmental sustainability** Growing concerns about environmental sustainability. Environmental issues influencing consumer destination choice. Tourism is generally lagging behind many other industries in seriously tackling sustainable development. Need to monitor the integrity of cultural, environmental and heritage assets and experiences. **Water supply issues** **Market doesn't recognise SA's rich natural & coastal assets** **Tourism policy—not effectively integrated into broader policy, encourage regional tourism strategic planning** Has not been effectively integrated into mainstream government policy nor regional and local level planning and policy. Need to create a positive policy environment and management strategies to ensure sustainable tourism. **Increase awareness and appeal by value adding to current strengths** **Increase access i.e. roads, information, permits to ensure visitors can access attractions, aviation** Improve the frequency, capacity and cost of flights to Adelaide and within regional South Australia. **Industry composed of SMEs** **Health of the economy in source markets** **Industry profitability— improve business**	**Sustainable tourism management—triple bottom line analysis** **Improve risk management** Manage the impact of external influences. Ensure increased visitor safety and security. Ensure liability insurance is available and affordable. **Improve existing business practices by encouraging use of new innovative productive technology, new entrants and continuous learning through training** New technology provides opportunities for businesses to increase efficiencies i.e. use geographic information system (GIS) technology **Develop a strong professional and profitable industry** **Industry cohesion—need an industry body** Forge productive alliances that create new opportunities and ensure the most efficient use of resources. **Increase accreditation systems to enhance quality of business management and systems, customer service & safety & social & environmental sustainability** i.e. Green Globe 21, the Nature and Ecotourism Accreditation Program (NEAP). **Strengthen working relationships with the CRC for Sustainable Tourism and Universities to develop innovative approaches to industry issues** **Research aimed at improving decision-**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
15. Strengthen relationships with international distributors & local government 16. Improve regional transport 17. Develop education & training to strengthen skills i.e. accurate interpretation & storytelling 18. Changing consumer behaviour & demographics: Attitudes to careers 19. Simple holidays based on main theme, with diversity & security 20. Increase in stress & increased focus on natural remedies & health & fitness 21. Increased interest in hard & soft adventure to escape conventional. 22. Spiritual 'pilgrimage' to places offering a sense of connection & time out/reflection 23. Reputation for wildlife viewing & interpretive experiences. Develop a marine interpretive centre 24. Environmental sustainability 25. Water supply issues 26. Market doesn't recognised SA's rich natural & coastal assets 27. Tourism policy not effectively integrated into broader policy, encourage regional tourism planning 28. Increase awareness & appeal by value adding to current strengths 29. Increase access 30. Industry composed of SMEs	**Commonwealth Government's ten year tourism plan** **Strengthen towns as 'hubs' —link events and products** **Strengthen relationships with international distributors and local government.** **Improve regional transport—strengthen relationships between SATC, transport departments, airlines and airports** **Develop education and training to strengthen skills i.e. accurate interpretation and storytelling** **Changing consumer behaviour and demographics: attitudes to careers—work /life balance and trading income for free time. The baby-boomers intend staying young and approaching retirement** **Provide simple holidays based on a main theme, with plenty of choice in activities and security** **Increase in stress and increased focus on natural remedies and health and fitness** **Increased interest in hard and soft adventure to escape the conventional** **Spiritual 'pilgrimage' to places offering a sense of connection and time out/reflection** **Reputation for wildlife viewing and interpretive experiences. Possibility to develop a marine interpretive centre**	**practices, networks and alliances, maximise efficiency of returns** **Increase visitor yield through longer stays and increased visitor expenditure** **Traditional financial institutions not geared for dealing with tourism. Tourism seen as risky and do not have a regional orientation** **Slowing of the national economy** **Increasing competition as other states diversify into and strengthen products that are SAs strengths i.e. arts and culture tourism** **Consumers are well informed and discerning—no longer trust the long accepted monuments of business, government and celebrities** **Seasonality** **Distance from source markets** **Dramatic unforeseen events i.e. geo-political conflicts, international events, transport reliability, reliance on favourable weather conditions, exotic pests or diseases, exposure to a narrow market, public liability** **Corporate ethics and responsibility**	**making** i.e. scenario planning, tourism forecasting, investigation of demand variables, technology (responding to new distribution systems and opportunities), aging of the population (impact on tourism industry and workforce needs), safety, security and health issues, understanding the market (motivations/new market segments), evaluation of marketing programs and campaigns, destination and product research, continued research into sustainability measures and assessment. **Research—need to strengthen economic analysis capabilities.** **Use Online technology** Increasing use of online/internet technologies for marketing and distribution. Encourage the industry's use of on-line networking. **Develop support infrastructure i.e. accommodation, airports, roads, signs, lookouts, walkways, environmental management, toilets** **Increase and attract 'green' investment** Develop guidelines to 'design with nature' using eco-friendly design techniques and innovative technologies. **Increase industry standards—ensure professionalism and reliability to maximise satisfaction** **Workforce skills—ensure supply & demand of labour/skills match**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
31. Health of source market economies 32. Industry profitability 33. Increase visitor yield through longer stays & increased expenditure 34. Traditional financial institutions not geared for dealing with tourism. Tourism seen as risky & do not have a regional orientation 35. Slowing of the national economy 36. Increasing competition as other states diversify into & strengthen products that are SAs strengths 37. Consumers well informed/discerning 38. Seasonality 39. Distance from source markets 40. Dramatic unforeseen events 41. Corporate ethics & responsibility 42. Sustainable tourism management—triple bottom line analysis 43. Improve risk management 44. Improve existing business practices. Encourage new innovative productive technology, new entrants, continuous learning through training 45. Develop a strong professional & profitable industry 46. Industry cohesion 47. Increase accreditation systems—enhance quality of business management & systems, customer service &			

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
safety & social & environmental sustainability 48. Strengthen relationships with the CRCST & Universities to develop innovative approaches to industry issues 49. Research aimed at improving decision-making 50. Research 51. Use online technology 52. Develop support infrastructure 53. Increase/attract 'green' investment 54. Increase industry standards 55. Workforce skills			
South Australian Tourism Commission July, 2006 **South Australia's Strategic Plan: Tourism Implementation Action Plan** www.tourism.sa.gov.au Key issues: 1. Tourism composed of SMEs, need industry body 2. Reduce the leave stockpile 3. Acknowledged respect for SAs marketing programs 4. Strong touring market 5. Deliver new events & festivals 6. SA strongly associated with wine 7. Difficulties/restrictions on obtaining planning approvals for development 8. Financial sector reluctant to engage in regional tourism development 9. Changing household consumption patterns,	**Tourism industry maturity—composed of SMEs, need industry body** Tourism is composed of fragmented SMEs that have no collective industry voice. Establish a strong and sustainable industry body that can reduce the reliance of the industry on the public sector for capacity building. It should focus on public liability, workforce planning, industrial relations, business training and maintaining accreditation programs. **Reduce the leave stockpile to increase tourism activity** **Acknowledged respect for SA's marketing programs** **Strong touring market due to September 11, Bali and SARS that increased Australian's domestic travel** **Deliver new events and festivals – reduce seasonality** **SA is most associated with wine**	**Difficulties with and restrictions on obtaining planning approvals for new infrastructure development** **Reluctance of the financial sector to engage in tourism development in regional areas.** **Changing household consumption patterns and higher levels of personal and household debt** Increases in spending on communications, household goods, home entertainment systems, furnishing, renovations and health, especially true in Sydney and Melbourne. **Changes in the labour market** i.e. increasing casualisation of the work force, long working hours and unused holiday leave **Increased costs of domestic travel i.e. GST**	**Airlines have a poor knowledge of SA and see SA as a fringe player**. **Need to improve air access and develop cooperative marketing with airlines to ensure new flights are successful.** A 'chicken and egg' problem. There is a lack of airline services, airlines are ambivalent hence there is a lack of direct air traffic etc. **Sustainable tourism development** **Regional Strategic Tourism Plans** **Growth in low cost air carriers** i.e. Virgin Blue and Jetstar offering city-to-city travel at more affordable prices, increasing seating capacity between capital cities and major tourism regions. **Considerable instability in SA's regional airline sector** **Rising price of petrol** Suppress demand in previously strong touring market

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
higher levels of debt 10. Changes in the labour market 11. Increased costs of domestic travel 12. Increased outbound travel 13. Reduced tourism affordability & competitiveness 14. national decline in domestic travel 15. Lack of investment in product that facilitates the experience. 16. Potential political backlash from areas that are not identified priority 17. SA least preferred destination of all Australian states (domestic market). 18. Need for substantial private sector investment in tourism. 19. SA is least associated with nature experiences 20. SA lacks competitiveness in product & needs new investment especially in regional SA 21. Airlines have poor knowledge of SA. SA seen as a fringe player. Need to improve air access & develop cooperative marketing with airlines. 22. Sustainable tourism development 23. Regional strategic tourism plans 24. Growth in low cost air carriers 25. Considerable instability in SA's regional airline sector 26. Rising price of petrol		**Increased outbound travel due to better exchange rate, increased seat capacity and increased affordability of holiday deals to NZ and south east Asia—particularly Sydney and Melbourne markets** **Reduced tourism affordability and competitiveness compared with consumables** **national decline in domestic leisure travel—fewer trips, shorter trips, spending less** **Lack of investment in product that facilitates the experience.** **Potential for political backlash from areas that are not within the priority areas identified** **Research shows that SA is the least preferred destination of all Australian states (in the domestic market).** **Need for substantial private sector investment in tourism.** **SA is the State least associated with nature experiences** **SA lacks competitiveness in product and needs new investment especially in regional SA**	

Western Australia

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Tourism Western Australia March, 2005 **The State Report: Destination Development Strategy, 2004-2014** http://www.tourism.wa.gov.au/Publications%20Library/Polices%20Plans%20and%20Strategies/Destination%20Development%20Strategies/Statewide%20Destination%20Development%20Strategy%202004-2014.pdf Key issues: 1. Backpackers/caravanners have less access issues 2. Consumers desire to experience, explore, discover & protect nature 3. Whole of government approach 4. Destination development strategies 5. Capital cities highly visited 6. New airport developments 7. Expand into new products 8. Develop eco style accommodation 9. Improve community attitudes towards tourists 10. Lack of basic facilities 11. Long haul destination 12. Poor access to regional areas 13. Increase signage & road quality 14. Maintain quality of destinations 15. Becoming overcrowded & over-commercialised 16. Lack of quality accommodation.	**Backpackers & caravanners have less issues with access** **Consumer desire to experience, explore, discover and protect natural areas** **Whole of government approach** **Destination development strategies** **Capital cities are the most visited destinations** **New airport developments** **Expansions into new tourism products** i.e. maritime museums and sinking of dive wreaks, cattle station experiences, Indigenous tourism. **Develop eco style accommodation** i.e. an eco-style lodge, safari camps and improved self-contained accommodation.	**Need to improve community attitudes towards tourists** **Lack of basic facilities** Lack of visitor information, clean toilets, supermarkets, restaurants, cafes, picnic benches, general maintenance (wet season) and signage. Particularly rural areas. **Long haul destination—even for interstate market** **Poor access to regional areas—long distance travel, boring, not enough things to do between destinations** **Need to increase signage and road quality** **Maintain quality of destinations** **Visitors believe tourism destinations in Australia have become overcrowded and over-commercialised** **Some areas have poor standard or lack of top range accommodation** **Poor standards and operating hours at some venues**	**Develop partnerships with key stakeholders** **Provide leadership** **Address gaps in infrastructure, attractions, access, activities, amenities, accommodation and other tourism facilities, conference and meeting facilities** **Focus on regional development and the dispersal of visitors to regional areas** **Focus industry development resources on enhancing tourism product in iconic experience areas. Identify and prioritise iconic attractions**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
17. Inconsistent standards/operating hours 18. Partnerships with key stakeholders 19. Provide leadership 20. Address gaps in infrastructure, attractions, access, activities, amenities, accommodation, conference & meeting facilities 21. Focus on regional development & visitor dispersal 22. Focus development resources on enhancing tourism product in iconic/priority experience areas			
Tourism Western Australia December 2007 **Strategic Plan 2008—2013: building for the future** http://www.tourism.wa.gov.au/Publications%20Library/Executive%20Services/Strategic%20Plan_2008.pdf Key issues: 1. Maximise yield & profitability 2. Grow & develop Indigenous tourism 3. Investor partnerships 4. Product quality & satisfaction 5. Sustainable/innovative services 6. Brand positioning & marketing 7. Focus on strengths 8. Major & business events, create events calendar, pre/post touring 9. Product delivery &	**Maximise yield and profitability of existing products and industry—focus on growing profit rather than visitor volume** Grow visitor expenditure faster than visitor nights or numbers **Opportunity to grow and develop Indigenous tourism** **Increase investment in infrastructure through investor partnerships** Work to support both public and private sector investment in WA tourism products and infrastructure. Influence major infrastructure priorities and attract private investment. Better coordinated investment attraction **Product quality and visitor satisfaction** Motivate and educate businesses, local government authorities and other public service providers to focus on the quality of products and services. Without a focus on quality and value, repeat visitation will suffer. **Deliver sustainable and innovative visitor services**	**Labour and staff shortages—need to increase pay and working conditions for employees** **Skills shortages/development and retention issues** Need to address the skills shortage and lack of skills development opportunities for staff in the industry. **Address gaps between visitor expectations & satisfaction** **Create and promote unique visitor experiences** **Increasing competition for both the traditional and emerging markets** **Increasing outbound travel—encourage domestic residents to holiday at home** **Work with regions to improve dispersal and enhance regional products and**	**Environmentally and socially responsible tourism—increasing awareness of the impact of tourism on the environment** **Develop a national accreditation system for tourism operators** **Research—brand, product, capacity and satisfaction tracking** **Research—focus on how to improve current offerings and how to develop new products and services** **Build recognition of and communicate the benefits and value of tourism—broaden it beyond the traditional impact on jobs and the economy**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
employment pathways 10. Labour & staff shortages 11. Skills shortages/ development & retention issues 12. Address gaps between visitor expectations & satisfaction 13. Create/promote unique products 14. Increasing competition for both the traditional & emerging markets 15. Increasing outbound travel 16. Work with regions to improve dispersal & enhance regional products & experiences 17. Climate change 18. Environmentally/socially responsible tourism 19. Develop national accreditation 20. Research—brand tracking 21. Research—product and service development 22. Build recognition of & communicate benefits & value of tourism, broaden it beyond traditional impact on jobs & the economy	Provide relevant, timely and motivational information services. **Brand positioning and marketing** Market WA as a unique and compelling proposition. State-wide marketing strategies that align with consumer needs and brand positioning. Market segmentation. **Focus on strengths** So they become known and highly desirable amongst key target markets both nationally and globally. For example: • marine • outback adventure • food and wine • forest and wildflowers • people and lifestyle **Develop major and business events, an annual events calendar and encourage pre and post touring** Identify opportunities to market and promote events to ensure increased awareness and participation. **Product delivery and employment pathways—need to ensure labour capacity, skills development and employment pathways**	**experiences** Address gaps in access, accommodation, activities and amenities which are holding back the potential of identified iconic experiences in their localities, and to protect iconic tourism experiences/activities under threat. **Climate change**	

Tasmania

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Tourism Tasmania December, 2007 **Tourism 21: Strategic Business Plan 2007–2010** http://www.tourismtasmania.com.au/pdf/2007_tasind_t21dec.pdf Key Issues: 1. Improve access i.e. air & sea 2. Aviation developments 3. Right people for service delivery 4. Skills/labour shortages: increase job opportunities & skills development 5. Tasmania's natural environment 6. Demand for nature experiences 7. Structural changes in technology, business & people's perceptions 8. Cars, homes & consumer technology taking more of people's income 9. Increasing use of the internet & the use of search engine marketing 10. Develop events 11. Promote Tasmania as cruise destination & home port for Antarctic cruise ships 12. Increase tourism investment 13. Changing travel distributions 14. Climate change & the environment 15. Create networking opportunities 16. Seasonality in tourism work 17. Travel is of diminishing	**Improve access i.e. air and sea** **Aviation developments i.e. new airline business models (low cost carriers), strong competition and increases in airline technology (A380 & A321)** Increases in airline technology i.e. the introduction of the A380 and the A321 which will improve long-haul and short haul operating economics. New low cost carriers. **Find the right people for service delivery** **Skills and labour shortages—particularly noticeable in regional Tasmania—develop opportunities for people to enter the industry and build their skills** **Tasmania's natural environment, pristine beauty and peacefulness** **Growth in demand for genuine nature experiences** **Global structural changes taking place in technology, business and people's perceptions of the world** **Cars, homes and consumer technology are taking more of people's income than ever before** **Increasing use of the internet and the use of search engine marketing—direct marketing** **Use events to support brand building, stimulate demand in shoulder and off-peak months and support other major marketing initiatives** **Promote Tasmania as a cruise destination**	**Changing travel distributions and consumer preferences** **Climate change and appreciation of the environment** Greater appreciation of Tasmania's pristine environment and renowned World Heritage areas. In recent years, climate change has emerged as a significant environmental concern. Tasmania has an opportunity to show the world best practice examples in these issues. **Create informal opportunities for communication between Tourism Tasmania and industry to support our formal communications structure** **Seasonality in tourism work** Overcome this by developing a marketing campaign to attract mainland visitors to Tasmania in winter **Travel is of diminishing interest to Australians** **Most travel marketing misses the mark—it has focused on the destination and not the personal desires of the traveller** **Tasmania's positioning needs to be broadened beyond the destination dimension—many people do not know of Tasmania's attributes** **Sustainable Tourism infrastructure development** For Tasmania this is particularly sensitive to respecting and sustaining the often priceless landscapes in which development takes place.	**Emissions trading schemes and the introduction of carbon efficient next-generation aircraft** **Increase research into the labour and skills needs of the industry** **Build on the strength of current brand positioning** **Use a return on investment (ROI) approach to marketing spend** **Ensure consistency between Tourism Tasmania and industry marketing initiatives** **Develop cooperative marketing programs** **improve marketing to repeat visitors through loyalty programs**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
interest 18. Most travel marketing misses the mark: too focused on destination 19. Broaden TAS's positioning 20. Tourism infrastructure development 21. Emissions trading schemes & the new carbon-efficient aircrafts 22. Increase research into the labour & skills needs of the industry 23. Build on current brand positioning 24. Use a return on investment (ROI) approach to marketing spend 25. Need consistency between Tourism Tasmania & industry marketing 26. Cooperative marketing programs 27. Improve marketing to repeat visitors	**and home port for Antarctic cruise ships** **Increase tourism investment** Introduce an accommodation occupancy monitoring tool for use by industry. Highlight infrastructure pressure points and opportunities.		

Northern Territory

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Northern Territory Tourism 2003 **Strategic Plan 2003–2007 And Strategic Plan Update January 2004** Contact: Valerie Smith, email. Valerie.smith@nt.gov.au Key issues: 1. Mixed target marketing—increase resilience to economic, global & seasonal trends 2. Need to take a strategic research & planning approach to destination development 3. Seasonality 4. Industry cooperation & partnerships 5. Maximising return on investment 6. A whole of government approach 7. Cultural & eco-tourism strengths & growth 8. Infrastructure 9. Business tourism, corporate meetings, conventions & incentives 10. NT is home to Uluru & Kakadu national Park 11. A strong perception that the NT & the Outback is 'the real' Australia. 12. NT has nature based & adventure tourism strengths 13. Indigenous tourism strengths 14. Access constraints—need to	**Mixed target marketing—increase resilience to economic, global and seasonal trends** **Need to take a strategic research and planning approach to destination development** Use of the destination development model. Clearly articulate the tourism strategy for the NT to enable all operators to 'dove tail' their own plan and activities. **Seasonality** Extend shoulder season by maximising promotional opportunities directed at non-peak periods. **Industry cooperation and partnerships** **Maximising the return on investment** **A whole of government approach** **Cultural and eco-tourism strengths and growth** **Infrastructure** Need to raise the standard and quality of tourism infrastructure in the NT. Develop infrastructure and tourism products that are more complementary to the NTs natural assets and match market demand. Develop alternatives to the 'icon' products. **Business tourism, corporate meetings, conventions and incentives** **NT is home to Uluru and Kakadu national Park** **A strong perception that the NT and the**	**Access constraints—need to attract additional air capacity and services and cruise ship facilities** Improve air, road, rail and sea access. Air access constraints, the rising cost of flights, unappealing scheduling, reductions in air capacity and distance from major source markets. Work with private sector to develop and present business cases to airlines to attract new air capacity and services. Lack of all weather road access within NT. Rising petrol costs. Promote NT as a cruise ship destination and support development of market-appropriate infrastructure and product. **Perception of access barriers** Low consumer understanding of the destination—perceived barriers and negative myths associated with travel to the NT—particularly in the domestic market. **Lack of product diversity and renewal** Heavy reliance on a few key markets and emphasis on a few major attractions and geographic areas. Anti-social behaviour in some town centre's negatively impacts visitor safety and satisfaction. **Lack of coordinated strategy and planning** Due to global threats, the tourism operating environment is rapidly changing—need for a strategic approach. NTTC has not always been effective in providing a coordinated strategic vision for the industry. **Changing consumer behaviour**	**Increasing use of the internet and online technology** **Mass media improving awareness of tourism product** **Changes due to technological advances i.e. larger tourism businesses, vertical integration, strategic alliances, internet access for information and book services** **Research, targets, forecasts and benchmarks.** **Research—continue the NT travel monitor, report performance on holiday visitors rather than total visitation, customer satisfaction and brand tracking research** **Research dissemination, relevance, electronic distribution and interactive websites** **Increased number of women in the workforce** **Customized holidays and niche market tours becoming increasingly popular** **Industry professionalism and standards** **Grow and develop Indigenous tourism** Further develop and promote sustainable Indigenous tourism product. Educate Indigenous organisations about the potential value of tourism for Indigenous people and lead cultural awareness education for industry. The challenge is to help develop sustainable Indigenous tourism experiences and promote these experiences in a way that appeals to the

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
attract additional air capacity & services & cruise ship facilities 15. Perception of access barriers 16. Lack of product diversity & renewal 17. Lack of coordinated strategy & planning 18. Changing consumer behaviour 19. Ageing population 20. Inconsistent & conflicting government policies 21. Competitive environment 22. Land access, tenure & management limiting access to key natural attractions 23. Overcrowding at icon locations leading to a decline in visitor satisfaction 24. Asian economic crisis, terrorism, SARS, the war in Iraq, the collapse of Ansett, September 11 25. Fluctuating global economy & low consumer confidence 26. Australia's housing cycle 27. Strong Australian economy 28. Increasing use of the internet & online technology 29. Mass media improving awareness of tourism product 30. Changes due to technological advances i.e. larger tourism businesses, vertical integration, strategic alliances, internet access for information & book services	**Outback is 'the real' Australia.** **NT has nature based and Adventure tourism strengths** The NT offers a 'big nature' experience with a wide variety of nature-based leisure opportunities. The NT is strongly associated with adventure and outdoor experiences. **Indigenous tourism strengths** The NT is closely associated with Indigenous culture an increasing motivator for tourist visitation.	Increasing popularity of short breaks. Growing disenchantment with a lifestyle that focuses purely on work and material possessions. A concern for health, well-being and balanced lifestyles. **Ageing population** The generation of post-war 'baby boomers' is reaching retirement age. Governments will struggle to maintain pensions at current levels, so standard of living will drop significantly in retirement. **Inconsistent and conflicting government policies** Inconsistent national park management approach between the NT and Commonwealth governments and conflict between conservation and tourism agendas. **Competitive environment** Other states trying to own 'outback' positioning and increasing marketing expenditure aimed directly at this products source markets. Increased competition from overseas and domestic destinations. **Land access, tenure and management limiting access to key natural attractions** **Overcrowding at icon locations leading to a decline in visitor satisfaction** **Asian economic crisis, terrorism, SARS, the war in Iraq, the collapse of Ansett, September 11** **Fluctuating global economy & low consumer confidence** Downturn in the world economy, political	needs of the marketplace and is sympathetic to the traditions and culture of Indigenous peoples.

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
31. Research, targets, forecasts & benchmarks. 32. Research—continue the NT travel monitor, report performance on holiday visitors rather than total visitation, customer satisfaction & brand tracking research 33. Research dissemination, relevance, electronic distribution & interactive websites 34. Increased number of women in the workforce 35. Customised holidays & niche market tours becoming increasingly popular 36. Industry professionalism & standards 37. Grow & develop Indigenous tourism		instability and an increase in international terrorism. This has resulted in declining visitation and cancellation of major events. **Australia's housing cycle** Housing cycle may impact on tourism demand, a significant rise in interest rates or unemployment could see property prices fall leaving some consumers financially vulnerable and possibly resulting in a decline in consumer spending. **Strong Australian economy** Australian consumer confidence is high. Rapid appreciation of the Australian dollar will make Australia a more expensive destination to visit while marking overseas destinations cheaper for Australian travellers. Leading to weaker demand from international markets.	
Northern Territory Tourist Commission 2008 **Five Year Tourism Strategy Plan: A plan to guide the direction and success of the Northern Territory Tourism Industry 2008 to 2012** Valerie Smith, Email. Valerie.smith@nt.gov.au Key Issues: 1. Ecotourism & volunteerism 2. Strength in nature/culture 3. Cluster products & coordinate collaborative/ complementary marketing 4. Iconic attractions & World Heritage national Parks 5. Unique historical & contemporary culture 6. Good weather in winter	**Ecotourism and volunteerism** Encourage opportunities for volunteerism and establish and promote the Territory's 'green' credentials so that the destination is seen as being responsible and actively working to protect the environment. **Strength in nature and culture** **Opportunity to cluster products and coordinate collaborative and complementary promotional activities** **Iconic natural attractions and two World Heritage national Parks (Kakadu and Uluru—Kata Tjuta)** **Unique historical and contemporary culture, especially Indigenous culture** **The NT during the cooler months is a welcome escape from a southern winter**	**Lack of diverse and innovative tourism product** **Air and road access constraints to the NT due to geographic isolation from other major centres and within the NT due to seasonal closure of roads** **Need for product and infrastructure development in Darwin to attract business tourism market** e.g. accommodation capacity, all weather off-site venues and service standards. **Fragmented and geographically dispersed industry and lack of critical mass and linkages in tourism networks** **Visitation to the NT is still highly seasonal** **Challenges in engaging Indigenous communities**	**Indigenous tourism development requires collaboration to advance Indigenous tourism, Indigenous involvement & commercial development on Indigenous land** Secure long-term leases on Indigenous land to enable non-Indigenous owned tourism enterprises to operate in tandem. Reliable tenure on Indigenous land impacts the decisions of investors and is an issue of strategic importance for the tourism industry **Nature-based tourism—heavily dependent on strong partnerships** i.e. with NRETA and Parks Australia. Tourism investment and commercial opportunities in parks are more likely to succeed when these partners are fully engaged and a shared appreciation for the needs of the land, as well as those of the consumer, is established.

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
7. Significant level of infrastructure investment, including a new convention centre & cruise terminal 8. Industry has had sound performance recently 9. Global demand for nature based/cultural experiences 10. New/refurbished accommodation opening 11. Rich history/heritage that complements strengths 12. The aviation industry: low cost airlines, airline liberalisation, advances in aircraft technology, develop new routes & emerging markets, proactive aviation developments, encourage charters, marketing support, help existing airlines, balance between competition & route viability, monitor route performance, minimise regulatory barriers 13. Business tourism 14. Technology 15. Changing consumer behaviour 16. Low cost carriers positively impacting use of consumer direct bookings via internet 17. Technology: changing how travellers experience trips 18. Global economic growth predicted, people more willing to spend money on discretionary items (travel) 19. Rapid growth in outbound travel (China, Korea, India) 20. Domestic visitation up despite national declines 21. Expansions in aviation and	**Significant level of infrastructure investment in the NT, including a new convention centre and cruise terminal in Darwin** **NT tourism industry performance over the past five years has been sound** **Global demand for nature based and cultural experiences are growing—well placed to meet this demand** **New and refurbished accommodation infrastructure coming on line** **Rich history & heritage that complements primary strengths** Particularly pioneering, World War II and multi-cultural origins. **The aviation industry: low cost airlines, airline rationalisation & liberalisation, advances in aircraft technology, develop new routes, establish emerging markets, proactive aviation development activities, encourage strategic charters, provide marketing support, support existing airlines, balance competition with sustainability and viability of existing routes, monitor route performance and minimise regulatory barriers to expansion** Expansion in the low cost airline model, but also with airline rationalisation and the gradual liberalisation of the aviation industry. Technological advances, such as the development of the Airbus A380 superjumbo and Boeing 787 Dreamliner, are presenting significant opportunities. Continue pursuit for new routes from established and emerging markets by demonstrating and highlighting opportunities to airlines. This will involve undertaking a range of proactive aviation development	**Constraints to investment due to size of the NT, the distance between major centres and limited number of integrated businesses** **Domestic travel makes up more than two thirds of the NT tourism industry and this market is only expected to grow at a slow rate** **Lack of private investment—industry dependence on government for tourism marketing and development** **Competition for 'outback' positioning** **Increased competition from global destinations—open tourism market and growth in Asia-Pacific region** **Minimal growth in domestic travel due to rising fuel costs, high debt levels, reduced leisure time, increased outbound travel, low cost airlines and a strong Australian dollar** **Difficulty in attracting skilled labour, especially in regional areas** **Negative perceptions of NT destinations reinforced through non-tourism media and news reports, particularly issues associated with remote Indigenous communities** **Risks associated with war, terror and disease affecting international visitation have attributed to poor traveller confidence** **Climate change impacts on the natural environment and traveller behaviour** An issue of increasing importance and impacting on consumer travel behaviour is climate change. A competitive advantage for the Territory is to demonstrate that it is	**Environmental sustainability is essential to industry's current and future viability** **Improve access and infrastructure** Cannot happen without the support of partners that have demonstrated commitment to the Territory such as commercial airlines, airports, rail and cruise companies. DPI is vital to providing and maintaining road access and infrastructure for tourism sites across the Territory. **Enhance industry knowledge** Through research initiatives and through relationships with Tourism Australia and collaborative activities with other STOs for consumer based insights. **Facilitate annual industry forums in both Alice Springs and Darwin, providing an opportunity for strategic partners such as Tourism Australia, airlines, specialist experts, tourism researchers and industry colleagues to discuss and debate trends and issues** **Improve industry skills and standards** **Cooperative arrangements with Alice Springs and Darwin Convention Centres aimed to grow the business tourism sector** **Partner with Tourism Australia to maximise marketing and promotion** **regional Tourist Associations and Visitor Information Centres (RTAs/VICs) are integral to providing on the ground support to industry members and for regional marketing and product development**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
cruise ship capacity 22. Increased low cost carrier routes in Asia providing affordable access 23. Improved business & traveller confidence 24. Increasing use of Internet by consumers, changing distribution channels 25. Develop festivals 26. Develop parks & reserves into experiences 27. Lack of innovative & diverse tourism product 28. Air/road access constraints 29. Need for infrastructure & product development to attract business tourism 30. Industry geographically dispersed, fragmented, small with weak networks 31. Visitation highly seasonal 32. Challenges in engaging Indigenous communities 33. Constraints to investment due to size of the NT, the distance between major centres & limited number of integrated businesses 34. Heavily reliant on domestic travel 35. Lack of private investment 36. Competition for 'outback' positioning 37. Increased competition from global destinations 38. Weak domestic travel 39. Hard to get skilled labour 40. Negative perceptions of destinations reinforced through non-tourism media & news reports 41. Risks associated with war, terror & disease	activities such as presenting business cases to airlines, encouraging strategic charters and providing marketing support to ensure new services are sustainable over the longer term. Build on and support existing airlines. Competition is important in terms of providing choice for travellers and cheap airfares, but it will need to be balanced against the sustainability and continued viability of existing routes. Monitor the performance of routes and working to minimise regulatory barriers to airline expansion. **Business tourism** Potentially higher yielding than leisure tourism. Business tourism offers an opportunity to flatten seasonality peaks. It also assists in developing business cases with airlines carriers for increased capacity or changes in scheduling—as evidenced by occasions when Qantas has put on larger planes to Alice Springs to accommodate large delegate numbers from the east coast. **Technology is forcing a shift from promotion to the travel trade to direct consumer marketing** A carefully considered transitional strategy is needed in order to reflect consumer confidence in individual markets and incrementally adjust this approach as markets develop. **Low cost airline carriers is positively impacting the use of consumer direct bookings via the Internet** **Technology is changing how travellers experience their trips** Already travellers are accessing the internet wherever they go, through mobile devices. Increasing numbers of travellers are, therefore, accessing information once	cognisant of, and responsive to, this issue. To reinforce this, facilities and amenities in our nature parks and reserves should reflect the Territory's 'green' credentials. Therefore, 'climate-friendly' power generators, waste disposal systems and water conservation are encouraged. Climate change is a major issue with broad ranging impacts on the economy, industry, communities and the environment. This is highlighted by the recent establishment of the Climate Change Policy and coordination unit within the department of the Chief Minister which is responsible for leading and coordinating policy responses across the Northern Territory Government. The Australian Government has indicated that it intends to implement a carbon trading scheme by 2010. Complementary measures to reduce emissions will require companies and governments to reduce emission levels by investing in energy efficient or cleaner technologies. Minimising the tourism industry's carbon footprint is an issue of national attention and debate. A national taskforce was recently convened to develop an Action Plan on climate change for the Australian Tourism Industry, an aim of which is to develop mitigation measures, assist the industry to reduce its carbon footprint and better understand the likely consumer response. Tourism NT is represented on this taskforce and will ensure that recommendations arising from the taskforce are appropriately communicated the tourism industry in the NT. Other initiatives will be explored also, including the potential to leverage environmental initiatives such as the federal Department of Climate Change acknowledging Alice Springs as Australia's solar centre.	**Improve tourism yield and profitability** **Build market strength in innovative, unique and experiential tourism product** **Be the leader in Indigenous tourism in Australia** **Own the outback experience segment in Australia.** **Maximize the environmental sustainability of our industry by turning challenges into opportunities, protecting natural assets and creating a competitive edge** **Be a truly e-enabled industry** **Create the experience through signature products, a compelling point of difference and Indigenous engagement** **Compelling marketing through an e-enabled industry, effective distribution and integrated global campaigns** **Develop the tourism labour force** Position tourism as an industry of choice for workers, provide opportunities for staged entry, explore opportunities to engage more Indigenous people in mainstream operations, import labour, up-skill our existing employees and do better at retaining staff within our industry. Engender the appeal of tourism while the future workforce is still at school and considering future careers i.e. offer attractive traineeships/apprenticeships. Consider ways by which to attract mature age workers, particularly those who may be travelling themselves and looking for short-term work. Employ Indigenous people in mainstream tourism. Leverage migration

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
42. Climate change impacts on the natural environment & traveller behaviour 43. Indigenous tourism 44. Nature-based tourism 45. Environmental sustainability 46. Improve access & infrastructure 47. Enhance industry knowledge 48. Facilitate industry forums to provide opportunity for strategic partners 49. Improve industry skills & standards 50. Cooperative arrangements with local convention centres aimed to grow the business tourism sector 51. Partner with TA to maximise marketing & promotion 52. RTAs/VICs to provide support to regional members for marketing/product development 53. Improve yield & profitability 54. Build market strength in innovative, experiential & unique tourism product 55. Be the leader in Indigenous tourism 56. Own the outback experience segment 57. Environmental sustainability 58. Create the experience through signature products, a compelling point of difference & Indigenous	they've arrived at a destination to find directions, restaurants, accommodation and attractions. Travellers are also booking elements of their travel post arrival. In this changing world VICs that offer technology based information and real time booking technologies are becoming increasingly important. Aligning and ensuring consistency of information is communicated to traveller's pre and post arrival is critical. **Changing consumer behaviour** Growth in independent travel, increased social/environmental awareness, trend towards more frequent short-stay trips and focus on high quality product/service. **Global economic growth predicted, people are more willing to spend money on discretionary items (travel)** **Rapid growth in outbound travel from China, Korea and India** **Domestic visitation to the NT is growing despite declines experienced across Australia** **Modest expansion in aviation capacity and significant growth in cruise ship industry** **Increased low cost carrier routes in Asia providing affordable access** **Improved business and traveller confidence due to no large shocks over the last two years** **Increasing use of the internet by consumers to plan and book travel and rapidly changing distribution networks** **Develop festivals** They provide visitors opportunity to		and overseas employment programs approved by the Federal Government. **Identify labour gaps and undertake education and training** Identify competencies needed now and for the future and work with training institutions to tailor industry based programs to meet these needs. Deliver training programs at times and in ways that suit the size and make-up of our industry—so that SMEs can take up these opportunities without worrying about how absences will impact on the ability to continue business operations. **Labour portability arrangements** To enable employees (or trainees) to move between employers or regions without loss of accrued entitlements, thus enabling them to increase their knowledge of the region and skills base whilst broadening career prospects. **Investigate cross-border employment** Investigate reciprocal arrangements with interstate tourism operators whose peak season requirements differ to the NT and may be conducive to the cross-border sharing of staff. **Sensitivity to issues of sustainability and destination integrity**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
engagement 59. Compelling marketing through an e-enabled industry, effective distribution & integrated global campaigns 60. Develop the labour force 61. Identify labour gaps, educate & train staff 62. Labour portability arrangements 63. Investigate cross-border employment 64. Sustainability & destination integrity	experience the cultures of the Territory and assist in addressing seasonality. **Develop parks and reserves into tourism experiences—funding, development, maintenance**		

Australian Capital Territory

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Environment ACT December, 2000 **Nature Based Tourism Strategy for the Australian Capital Territory** http://www.tams.act.gov.au/__data/assets/pdf_file/0015/13029/nbtstrategy.pdf Key issues: 1. Strengths in nature based tourism 2. Range of indigenous, cultural & heritage products 3. national Capital status 4. Environmental tourism management development 5. Growth & development of education tourism 6. Develop thematic loops & trails 7. Value add facilities & services at existing destinations 8. Thematic marketing 9. Links with special events tourism in selected locations 10. Substantial VFR tourism market 11. Promotion of associated agency activities i.e. wildlife research 12. Product development & infrastructure investment 13. Interpretive signage development 14. Limited tourism infrastructure i.e. accommodation 15. Difficulties with access 16. Insufficient product development 17. Canberra is 'taken for	**Has strengths in nature based tourism** Diversity of nature based tourism opportunities. Contemporary lifestyle & tourism trends which are consistent with nature based tourism development. Good product but lack of nature based tourism profile, destination icons, promotion and operators. Potential conflict about nature based tourism development. Brand the ACT as a nature based tourism destination. Increase recognition of the ACT as a unique nature based tourism destination i.e. destination branding and positioning as the 'Bush Capital'. **Range of Indigenous, cultural and heritage products** **national Capital status** **Environmental Tourism Management Development** Develop and market 'Best Practice' in environmental tourism & environmental management. **Growth and development of education tourism** **Develop thematic loops and trails** Opportunities exist for interpretive tours and information on Indigenous culture, flora and fauna. **Value add facilities and services at existing destinations** **Thematic marketing** **Links with special events tourism in**	**Limited tourism infrastructure i.e. accommodation** **Access** Difficult access to some of the ACT's more spectacular areas. **Insufficient product development** **Canberra is 'taken for granted'** **Decline in growth in Australian domestic travel** **Increasing interstate and regional competition** **Potential environmental concerns** **Public liability** **Possible usage conflicts**	**Maintain visitor research** **Establish a nature based tourism network** **Use new concepts for sustainable building, including:** • low embodied energy in the building fabric • low recurrent energy demands through passive and active solar space heating • processing wastewater to drinking water standard • on-site recycling of waste generated by the shop, restaurant and other visitor activities

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
granted' 18. Decline in growth in Australian domestic travel 19. Increasing interstate & regional competition 20. Potential environmental concerns 21. Public liability 22. Possible usage conflicts 23. Maintain visitor research 24. Establish nature based tourism network **25.** Use new concepts for sustainable building	**selected locations** **Substantial VFR tourism market** **Promotion of associated agency activities i.e. wildlife research** **Product development and infrastructure investment** **Interpretive signage development**		
Australian Capital Tourism 2005 **Seeds for Success** Contact: Justin Lalor, email. Justin.lalor@act.gov.au Key issues: 1. The internet 2. Flat domestic tourism 3. Higher levels of household debt (housing/credit cards) 4. Changing consumption patterns 5. Increasing competition between domestic destinations 6. Changes in the labour market 7. Negative perceptions of Canberra 8. Low awareness of Canberra 9. Visitation affect by transport scheduling, viability & fare prices 10. Rising petrol prices 11. Plans to develop transport & access, marketing, events & exhibitions, destination	**The internet** The internet has established itself as one of the primary sources of information for researching and planning holidays for our target market segments.	**Flat domestic tourism** Competitive and challenging market. Goal is to grow market share. **Higher levels of household debt (housing/credit cards)** **Changing consumption patterns** Leakage from domestic to international holiday destinations due to a decline in the affordability of domestic travel. **Increasing competition between domestic destinations** **Changes in the labour market** Increasing stockpile of unused leave. **Negative perceptions of Canberra** Lack of knowledge, stereotyping, political references to Canberra relating to decisions made by the government and perpetuated by the news media i.e. use of the word 'Canberra' instead of 'Parliament House'. Culture of negative word of mouth commentary. Canberra associated with politics and not as a holiday destination **Low awareness of Canberra** A relatively young product that has not received the exposure of established	**Plans to develop transport and access, marketing, events and exhibitions, destination development and community awareness**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
development & community awareness		destinations such as Sydney or Melbourne. A relatively new brand that is still the early stages of the brand life cycle resulting in low, but growing, awareness in target markets. Little destination marketing focus by the tourism sector in the ACT. Lack of knowledge hinders the preference to visit. Not 'top of mind' when holiday decisions are considered. **Visitation affected by transport scheduling, viability and fare prices** **Rising petrol prices** Consumers will seek cheap, easy options to go to popular tourism destinations (Jetstar phenomenon), drive and fly/drive holidays become relatively more expensive in a market of rising fuel prices.	
Australian Capital Tourism 2005 **Our Industry—Our Future** Contact: Justin Lalor, email. Justin.lalor@act.gov.au Key issues: 1. Numerous natural attractions—can develop spin off products 2. An improving food & wine reputation 3. Improving cooperation & collaboration among attractions 4. Use themes to tell 'Australian story' 5. Opportunity to become involved in & take advantage of 2013 centenary celebration 6. Become actively involved in the civic redevelopment process 7. Education tourism to the ACT	**Numerous natural attractions—opportunity to develop spin off products** i.e. soft and hard adventure, nature-based tourism, cycling and Indigenous tourism experiences. **An improving food and wine reputation** **Improving cooperation and collaboration among attractions** **Use themes to tell the 'Australian story'** **Become involved in, and take advantage of 2013 centenary celebration** **Become actively involved in the civic redevelopment process** **Education tourism to the ACT** Leverage secondary and tertiary education programs for domestic and international students, family and alumni.	**Flat domestic and international overnight visitation** **Difficulties creating a supportive community** **Decline in the number of major exhibitions** **Need to reinvention or refresh the ACT's core product** **A decline in destination marketing support and resources** **Inadequate investment in a new Canberra Convention Centre** **Narrow attraction and/or experience base relative to competition** **Decline in quality of accommodation** **Continuing stereotypical negative portrayal of Canberra**	**Canberra's strengths—parliament, politics, education, history** **Research—further build knowledge base** Build and maintain a knowledge base to support decision making. Event evaluation, trends identification, performance monitoring. **Destination development** Ensure that products and experiences provided within the ACT and region meet the expectations of the visitors. i.e. accommodation, access, transport and signage, Canberra Convention Centre. Encourage the development and/or enhancement of attractions, products, experiences and packages that broaden the appeal of the destination and or increase the yield. Nature-based and Indigenous, food and wine, adventure and sport, arts and culture. **Encourage industry cooperation**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
8. Build community & government support for tourism 9. Grow business & major events 10. Improved relationship with Tourism NSW & Tourism Australia 11. Touring route development 12. Leverage excellent sporting facilities, sporting success & AIS positioning 13. New Canberra Convention Centre 14. Regions reputation for quality arts, music & crafts 15. Flat domestic & international overnight visitation 16. Difficulties creating a supportive community 17. Decline in the number of major exhibitions 18. Need to reinvention or refresh the ACT's core product 19. A decline in destination marketing support & resources 20. Inadequate investment in a new Canberra Convention Centre 21. Narrow attraction/ experience base relative to competition 22. Decline in quality of accommodation 23. Continuing stereotypical negative portrayal of Canberra 24. Skilled/unskilled labour shortages 25. Poor access to, & signage of, attractions in the ACT	**Build community and government support for tourism** **Grow business and major events** Encourage growth of the Federal Government meetings and conferences. Build on existing events i.e. Anzac Day/Australia Day and others to create a multi-day program. Develop new events that leverage the natural advantages of the ACT and region. **Improved relationship with Tourism NSW and Tourism Australia** **Touring route development opportunities** **Excellent sporting facilities, sporting success and AIS positioning** **New Canberra Convention Centre** **Region's reputation for quality arts, music and crafts**	**Skilled and unskilled labour shortages** **Poor access to, and signage of, attractions within the ACT and region** **Possible inadequacy of facilities that can accommodate an ageing population** **Decline in competitive access to the ACT** **Low value for a wholesaler or agent due to dominance of non commissionable product** **Very few major events** **Relatively low private sector investment in attractions or destination marketing** **Variability of economic activity** **A decline in economic activity will impact on discretionary income that will affect all travel** **Changing consumer behaviour—annual leave, short breaks, outbound travel** **Increased competition—tangible goods, Asian destinations** Relative competitiveness of tourism in relation to consumables. A trade off from travel to home-based products. Increasing discount airline services to anywhere else other than the ACT. An increase in discount international airfares intra Asia may make Australia less attractive. **Major world shock or disaster—could decrease tourism** **A further rise in the Australian dollar** Will increase the value of overseas holidays for Australians and a decrease in domestic demand.	**Skills attraction and development** Growth could be stifled by skill shortages that range from hospitality to translators, as well as poor business skills.

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region 26. Inadequacy of facilities that can accommodate an ageing population 27. Decline in competitive access to ACT 28. Low value for a wholesaler or agent due to dominance of non commissionable product 29. Very few major events. 30. Low private sector investment in attractions or destination marketing 31. Variability of economic activity 32. Slowdown in economy impacting on discretionary income & travel 33. Changing consumer behaviour 34. Increased competition 35. Major world shock or disaster—could decrease tourism 36. Rising Australian dollar 37. Drought 38. The volatility in oil prices 39. Strengths—parliament, politics, education, history 40. Build knowledge base 41. Destination development 42. Encourage industry cooperation 43. 44. Skills attraction & development		**Drought** Will result in an increase in water restrictions and a decrease in the attractiveness of areas affected both in terms of appearance and facilities. **The volatility (currently very high) in oil prices** This will discourage the drive market, particularly, those who are driving long distance. It will also have an impact on airline travel. Loss of appeal and competitiveness of Australia relative to other country destinations due to it being a long-haul destination.	

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ACT & Region Chamber of Commerce and Industry 2006 **Canberra's tourism industry** http://www.ticact.org.au/documents/Lobby_Policy/Position%20Paper%20-%20September%202006.pdf Key issues: 1. Australian Capital Tourism merged into another department 2. Government not keeping Tourism White Paper promises 3. Skills training & education to meet forecast demand 4. Cuts in research, marketing & development budgets	**Australian Capital Tourism merged into a department responsible for various other activities** **Government not keeping Tourism White Paper promises** **Skills training and education to meet forecast demand**	**Cuts in research, marketing and development budgets** Cuts in the research budget, potentially impacting on forecasting, planning and decision making. A reduced number of industry and product development opportunities available which potentially impact on tourist experiences. Reduced budget impacts on the industry's ability to maintain and increase visitation through marketing, as well as remaining economically strong in the new environment.	

Appendix E: Regional Tourism Strategies

New South Wales

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Tourism New South Wales 2002 **South Coast: regional Tourism Plan 2003–2006** http://corporate.tourism.nsw.gov.au/Sites/SiteID6/objLib13/South_Coast_regional_Tourism_Plan.pdf Key issues: 1. Target markets that reduce seasonality & focus on strengths 2. Sustainable tourism development, practices & growth 3. Tourism is a major industry & the region is high successful in tourism 4. Improve/increase yield, visitation & length of stay 5. Whole of government & sustainable destination management 6. Extensive range of ecosystems, many protected in national parks. Need to protect the natural environment by encouraging sustainable development 7. Good location—close to cities 8. Well developed infrastructure 9. Successful investment in marketing 10. Major bias towards summer visitation—highly seasonal 11. Need adequate infrastructure for growth—	**Target markets that reduce seasonality and focus on strengths of the region** Identify and target strategic market opportunities i.e. nature tourism, art, food and wine, culture and heritage, VFR, family holidays, touring and short breaks. **Sustainable tourism development, practices and growth** **Tourism is a major industry and south coast is a highly successful tourism region** **Improve and increase yield** **Increase visitation and length of stay** **Coordinated whole of government approach to sustainable destination management** **Extensive range of ecosystems, many protected in national parks and reserves. Need to protect the natural environment by encouraging sustainable development** **Good location—closest beaches to Canberra and close to Sydney** **Well developed tourism infrastructure including accommodation, attractions and events** **Successful investment in marketing** Over a long period by local and regional tourism bodies.	**Major bias towards summer visitation—highly seasonal** **Need adequate infrastructure for growth— create a positive investment climate** **Improve transport networks** **Ensure resources are allocated appropriately** **Strengthen tourism to regional areas**	**Foster tourism product to cater for target markets** **Improve service levels** **Educate operators to understand the market** **Ensure appropriate training and development of industry** **Increase networking**

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create a positive investment climate 12. Improve transport networks 13. Ensure efficient resource allocation 14. Strengthen tourism to regional areas 15. Foster tourism product to cater for target markets 16. Improve service levels 17. Educate operators re the market 18. Ensure appropriate training & development of industry 19. Increase networking			
Riverina regional Tourism Inc. And Tourism New South Wales 2003 **regional Tourism Action Plan (2003–2006)** Contact: Fiona Last, email. Naturally@riverinatourism.com.au Key Issues: 1. Develop sub-regional circuits & loops to create short driving, cycling & walking experiences 2. Product & infrastructure development 3. Improve access (coach & air) 4. New & upgraded accommodation facilities 5. The Region is associated with quality agricultural product 6. Quality roads with many highways dissecting the region	**Develop sub-regional circuits and loops to create one to three day driving, cycling and walking experiences in the region** **Product & infrastructure development** **Improve access by coach and air into the region** **New and upgraded accommodation facilities** **The region is associated with quality agricultural product** **Quality of roads with many highways dissecting the region** **Elements of history and heritage accessibility to other regions** **Wine production** **Diverse agricultural product** **Commitment to make tourism work** **Support for tourism by some shire councils**	**Lack of funding for the RTO** The region's tourism organisation (Riverina regional Tourism Inc. (**RRT**)) is financially hamstrung in its ability to devise and implement strategies for the sustainable growth of tourism. Lack of adequate income for RRT to achieve tangible results and to gain support from stakeholders. **Previously attempted to promote the region's diversity with little success** **Lack of data on the economic benefits that tourism brings to the region and which shows direct, indirect and induced benefits** **Lack of economic benefit from the generic promotion of the region** **Lack of a point of difference for the region and unclear positioning** **The region is not an homogenous visitor destination** The Riverina is a diverse destination and because of this the region has struggled to find a clear point of differentiation in the tourism market.	**Conduct training seminars to address weaknesses and improve networking** **Develop stakeholder forums to increase networking and develop community based tourism projects** **Introduce 'tag-lines' to support the region's current branding and to creating greater relevance from a tourism perspective** **Educate the community and local government** A lack of understanding and awareness of tourism at local community and local government levels. Raise the level of understanding and awareness of tourism throughout the community. Focus on the benefits of tourism to the region, prepare and implement a community awareness campaign highlighting the importance and benefits of the industry. **Representation —the region's boundary** Adjust the boundary of the region to create an homogenous and more workable tourism region.

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
7. Elements of history & heritage 8. Accessibility to other regions 9. Wine production 10. Diverse agricultural product 11. Commitment to make tourism work 12. Support for tourism by some shire councils 13. Improved frequency of air travel to Wagga Wagga & Griffith 14. Proximity to Canberra 15. Natural beauty 16. Country-style hospitality 17. The small towns & their streetscapes 18. The Riverina regional Development Board 19. Opportunity for collaboration between councils 20. Develop & upgrade accommodation 21. Opportunity to put Riverina on the backpacker circuit 22. High occupancy levels 23. Improve average room yield 24. Provide facilities that meet the needs of future niche markets i.e. leisure & short break markets 25. Tourism activities & accommodation facilities of a higher standard being established in the Region 26. Opportunity to build upon, the farmers' market & further develop other markets 27. Walking tracks & cycle-	**Improved frequency of air travel to Wagga Wagga and Griffith** **Proximity to Canberra** **Natural beauty** **Country-style hospitality** **The small towns and their streetscapes** **The Riverina regional Development Board** **Opportunity for collaboration between councils to develop tourism** **Develop and upgrade accommodation** Identify sites for new accommodation designed to meet the needs of target markets. **Opportunity to put Riverina on the backpacker circuit** Particularly due to the new backpacker development and available seasonal work. **High occupancy levels** Little need to discount or package accommodation but limiting growth in the holiday market and tour packages. **Improve average room yields** **Provide facilities that better meet the needs of future niche markets, particularly leisure and short break target markets** **Tourism activities and accommodation facilities of a higher standard being established in the region** **Opportunity to build upon, the farmers market and develop up other markets**	**Strong parochial attitudes** Leading to the non-acceptance of Wagga Wagga and Griffith as important hubs for the region and to a lack of a collaborative effort **A lack of tourism focus by local government and the agriculture sector** i.e. wineries that see themselves as operating independently from the tourism sector. **Lack of tourism industry structure** There is only one local tourism association and little support from tourism operators, including accommodation providers etc. in the form of participation in regional marketing and development initiatives **Cost of airfares** **Lack of tour options in the region** **Lack of packages to the region** Due, in part, to the lack of excellent tourism product. **Variable quality of accommodation** **Lack of excellent tourism product and interactive experiences** Too many passive, driving experiences. **Variable quality of visitor attractions and public infrastructure** Many cases, they are regional assets rather than visitor attractions *per se.* **Restaurant and cafe opening hours** **A small local market that is unable to support tourism ventures on its own** **Lack of a major attraction**	**Increase revenue and income for the RRT so that it can meet stakeholder expectations** **Hire additional staff to achieve desired outcomes** **Form two sub-region tourism action groups** **Facilitate industry training, up-skilling and accreditation to improve service standards throughout the region** **Review of the regions positioning and create a clear point of difference for the region that can be recognised by consumers and target markets** **Conduct a development audit** To identify assets that need improvement/enhancement, gaps in development and to indicate the health of the tourism sector. **Target special interest group niche markets to improve the yield** **Target the short breaks market** **Governance** Increase the role of the shire councils in tourism development and in working with RRT with regional promotion. **Facilitate joint venture, cross regional developments** **Facilitate up-skilling, training sessions for tourism operators** **Encourage new ventures** **Encourage higher spending leisure visitors**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
ways 28. The Greens Pasta Factory—development opportunity 29. Opportunity for wetlands packaging 30. Develop planned itineraries (for FIT market) 31. Strong mid-week visitation, low weekends 32. Grow Farm stays / B&Bs 33. Lack of funding for RTO 34. Previously attempted to promote the region's diversity with little success. 35. Lack of data on economic benefits of tourism—need to show direct, indirect & induced benefits 36. Lack of economic benefit from the generic promotion of the region 37. Lack of a point of difference for the region & unclear positioning 38. The region is not an homogenous destination 39. Strong parochial attitudes 40. Local government and agriculture sector lacks tourism focus 41. Lack of industry structure 42. Cost of airfares 43. Lack of tour options in the region 44. Lack of packages to the region 45. Variable quality of accommodation 46. Lack of excellent tourism product & interactive experiences 47. Variable quality of visitor attractions & public	**Walking tracks and cycle-ways** Walking tracks and cycle-ways could be developed to follow the path of the Murrumbidgee River; the tracks and cycle-ways could be developed in conjunction with neighbouring RTOs as cross-border initiatives. **The Greens Pasta Factory is a good product development opportunity** **Opportunity for wetlands packaging** **Opportunity to develop planned itineraries for the FIT market** **Mid-week visitation is strong while weekends are lower** **Opportunity to grow Farmstays/B&Bs**	**Distance from main metropolitan markets** **Poor quality of local and regional visitor guides** **Poorly defined in the market place** The region's positioning and point of difference are unclear. **No Indigenous, cultural experience** **Poor signposting and interpretation, including for entrances to towns and in consistency of design** **The quality of public infrastructure** **The lack of a tourism focus by some shire councils** **A drive-through region rather than a destination** **Distances between towns and attractions** **Poor service standards** Service standards need enhancing. **Lack of planning to preserve and promote heritage assets** **Variable quality of accommodation facilities** **Variable quality of public infrastructure** i.e. townscapes, toilet facilities, signposting and interpretation **Restaurant and café opening hours** **Farms and agri-tourism issues** High public liability insurance premiums, the need to educate the farming community on	**Develop and improve tourism product and infrastructure and basic public infrastructure** Such as signage and public toilets via town beautification programs, street-scape enhancement. **Ensure RTO is responsible for representing (promoting and managing) a homogeneous destination and is focused on core activities** **Ensure that the RTO has an efficient operations structure** **Ensure that the RTO achieves economies of scale and synergies in its marketing and development initiatives** **Ensure local tourism operator support for product enhancements, including training, up-skilling and accreditation** **Market research** Conduct more in-depth qualitative and quantitative research and ensure data is appropriately distributed to industry, government and other stakeholders **Marketing & promotion** Create a point of difference for the region and develop this through effective positioning and product development.

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
infrastructure 48. Restaurant & café opening hours 49. A small local market that is unable to support tourism ventures on its own 50. Lack of a major attraction 51. Distance from main metropolitan markets 52. Poor quality of local & regional visitor guides 53. Poorly defined in the market place 54. No Indigenous, cultural experience 55. Poor signposting & interpretation (town entrance & consist design) 56. The quality of public infrastructure 57. The lack of a tourism focus by some shire councils 58. Drive-through region rather than a destination 59. Distances between towns & attractions 60. Poor service standards 61. Lack of planning to preserve & promote heritage assets 62. Variable quality of accommodation facilities 63. Variable quality of public infrastructure 64. Opening hours (i.e. F&B) 65. Farms/agri-tourism issues 66. Inadequate visitation & low yield capping investment 67. Stakeholders see regional branding as more relevant to agriculture than tourism 68. Conduct training seminars to address weaknesses & improve networking		the components of agri-tourism, need to up-skill farm hosts, need to work with councils to gain support for agri-tourism initiatives, need to work with TNSW to overcome the perception that the drought has adversely effected the quality of agri-tourism experiences, need to ensure that the agri-tourism product in the region competes well with that offered in other regions. **Inadequate visitor numbers and low visitor spend are capping investment** **Stakeholders see regional branding as more relevant to agriculture than to tourism**	

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
69. Develop stakeholder forums—networking & develop community tourism projects 70. Introduce tag-lines to support branding & create greater tourism relevance 71. Educate the community & local government 72. Representation —the region's boundary 73. Increase revenue & income for the RRT—meet stakeholder expectations 74. Hire additional staff to achieve desired outcomes 75. Form two sub-region tourism action groups 76. Facilitate industry training, up-skilling & accreditation to improve service 77. Review the regions positioning & differentiate to increase awareness 78. Development audit 79. Target niche markets to improve yield 80. Target short break market 81. Governance 82. Promote joint venture/cross-regional projects 83. Facilitate up-skilling, training sessions for tourism operators 84. Encourage new ventures 85. Encourage higher spending leisure visitors 86. Develop/improve tourism product, infrastructure & basic public infrastructure 87. Ensure RTO is responsible for promoting/managing homogeneous destination,			

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
focused on core activities 88. RTO needs an efficient operations structure 89. RTO to achieve economy of scale & synergy in its marketing & development 90. Operator support for training, up-skilling & accreditation 91. Market research 92. Marketing & promotion			
Hunter Regional Tourism Organisation 2005 **The Hunter Region Strategic Tourism Plan 2005–2008** Key issues: 1. Brand used for regional marketing 2. regional cooperation with marketing 3. Private sector investment in tourism infrastructure 4. Key road & rail projects are underway/planned 5. New Virgin Blue/Jetstar flights between Melbourne, Brisbane & Newcastle 6. Airport forecast to double passengers 7. Larger operators provide online booking 8. Councils positive about tourism 9. Existing funding is high 10. Upper Hunter Country Tourism successfully applied for funding for various tourism initiatives 11. Newcastle offers large city experience, complemented by beaches, heritage /history & cultural sites 12. High consumer recognition	**Brand used for regional marketing** "Hunter, so much so close" **Some regional cooperation with marketing** Lake Macquarie/Newcastle undertake some joint marketing, and occasionally participate with Port Stephens. Gloucester and Dungog work well together under the Barrington Tops Brand. Upper Hunter values linkages with neighbouring Regions, particularly those along the Golden/New England Highway. **Significant private sector investment in tourism infrastructure** **Key road projects are currently underway or planned for** i.e. F3 Extension, Weakley's Drive Intersection, Muswellbrook Bypass, Golden Highway, Bucketts Way, Extension Hwy 23. **Key rail projects (passenger) currently underway/planned for** i.e. Lake Macquarie Interchange, Newcastle Transport Interchange, Upgrade of Newcastle/Sydney rail line, Upgrade of Newcastle Airport **Recent commencement of flights between**	**Region has weak market share** Against neighbouring regions, likely to fall further if visitation remains stagnant **Trying to appeal to all markets at both the regional and sub-regional level** Something for everyone approach is not working, visitor decline/stagnation, and low consumer awareness that the Hunter Region contains anything except wine. **Poor branding—mainly associated with wine, disjointed branding, doesn't articulate core strengths** Consumers continue to associate region with wine and little else. LTAs have their own brands, confusing to consumers as they do not articulate relevant information. Concern that branding doesn't articulate core strengths of the Hunter Region. **Region on the verge of decline—particularly for wine region** **Lack of public transport** **Market segmentation not working** Isn't tailored to different market segments. Market segmentation is understood in theory, but not used in practice to tailor communications to consumer segments. **Lack of direction on how much focus to place on the business and leisure markets** **Investors concerned about regions lack of**	**Structural labour supply issues—resolve through partnerships between operators & government.** **Provide a new strategic marketing direction for region** Enable effective targeting and communication with visitors. Identify product development opportunities in line with market needs. **Identify ways to attract new/growing markets and examine potential linkages within the region and with other regions** **Prioritise infrastructure development opportunities that will have maximum short to medium term impact** **Increase conversion of consumer interest to purchase of regions tourism by improving information distribution, visitor services and the use of technology** **To ensure that the right structures are in place to deliver the plan's new business model** **Establish product zones to increase tourism business by promoting their cluster of experiences to targeted**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
13. regional marketing group—regional collaboration 14. Wine Country conducts regular surveys of operators 15. Recent focus on Melbourne & interest in Brisbane & other interstate markets—large opportunity with Interstate markets 16. Weak market share 17. Trying to appeal to all markets at all levels 18. Poor branding—mainly associated with wine, disjointed, doesn't articulate core strengths 19. On the verge of decline 20. Lack of public transport 21. Market segmentation not working 22. Lack of direction 23. Investors concerned about lack of strategic leadership 24. No regional strategy for events or MICE markets 25. Number of operators sell distressed inventory on online travel booking sites 26. No VIC has automated product management & booking system 27. Sales is fundamentally a manual process 28. Board—not accessible, accountable or skilled in tourism & comprised of council representatives 29. Customer service not meeting market expectations—particularly for high priced services 30. Changing consumer behaviour 31. Newcastle cant loose the	**Melbourne, Brisbane and Newcastle Airports by Virgin Blue and Jetstar** **Airport forecast to double passengers** **Larger operators provide for online booking through their own websites** **Councils are positive about tourism** **Existing funding levels across the region are high** **Upper Hunter Country Tourism has successfully applied for significant funding for various tourism initiatives** **Newcastle offers large city experience, complemented by beautiful beaches, heritage/history and cultural sites** **Newcastle—high consumer recognition** **Regional marketing group—positive step towards regional collaboration** **Wine Country conducts regular surveys of operators in Wine Country through BA arket Surveys** **Recent focus on Melbourne and interest in Brisbane and other interstate markets—realisation of the large opportunity with these interstate markets**	**strategic direction/leadership** Sense that the Hunter Tourism does not provide the strategic leadership sought by its members. **No defined regional strategy for dealing with events or MICE markets** **A significant number of operators sell distressed inventory on online travel booking sites such as wotif.com and ratestogo.com.au** **No VIC has a fully automated product management and booking system.** **Wine Country has the strongest sales focus in the region but the process is fundamentally manual** **Board is not accessible, accountable, lacks skill/knowledge of tourism and comprised of council representatives** **Level of customer service does not meet market expectations, particularly for services charging high prices** **Changing consumer behaviour** More discerning, seeking value for money, prepared to pay but want quality. **Newcastle struggles to move away from perceptions that it is an unattractive steel/industrial city** **Unclear definition of roles of TNSW vs. Hunter Tourism vs. LTA/LGA – overlap of functions** **Funding – duplicated, spent on admin, limited marketing spend, not guaranteed, relying on performance**	**consumer segments.** **Newcastle Airport as opportunity to grow interstate visitation and fly/cruise options** **Adopt a standardised and integrated regional approach to distribution and sales through the 'Hunter Tourism Exchange'** **Restructure the Hunter Tourism Board to achieve greater industry representation.** **Need to ensure the sustainable growth of interstate passengers through the airport** **Provide a new strategic marketing direction for the Hunter region, enabling both effective targeting and communication with visitors, and to identify product development opportunities in line with market needs** **Key opportunities for increasing interstate visitation are the drive market (multi-destination) and the fly-drive market (using Newcastle Airport as the hub)** **Drive market—SE QLD/Brisbane and Victoria/Melbourne to be key targets** **A whole of region approach is required rather than one product zone only** **Inter-region cooperation is desirable and will expand opportunities—links can be**

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perception of being an unattractive industrial city 32. Undefined roles of TNSW vs. RTO vs. LTA/LGA—overlap of functions 33. Funding—duplicated, spent on admin, limited for marketing, not guaranteed, relying on KPIs 34. Varying levels of council support for tourism 35. VICs—poor sales training, sales not a core focus, some charge commission, others don't, some only provide a referral service, not involved in sales process/distribution, collect limited statistics 36. Marketing money spent on visitor guides – mainly product directories, don't inform consumer on area 37. Insufficient funding spent on consumer awareness of region/experiences 38. No focus on developing inter-regional linkages & no defined approach for intra-regional linkages 39. Limited focus on product development RTO & LTAs do not play a role in this 40. Poor research, low regional quality, conflicting data sources/methodology, not used for campaign or product development 41. Some areas lack a range of quality tourism products 42. Support of product development is reactive rather than proactive/strategic		**Varying levels of council support for tourism across the region** **VICs—poor sales training for staff, sales not a core focus, some charge a commission, others don't, some only provide a referral service. Not involved in sales process or distribution channel, collect limited statistics on visitors and enquiries** **Majority of marketing spend on visitor guides—mainly product directories, don't inform the consumer about area** **Insufficient funding spent on consumer awareness of region/experiences** **No regional focus on developing inter-regional linkages and no defined approach for intra-regional linkages** **Limited focus on product development** RTO and LTAs do not play a role in this. **Poor research—poor quality at regional level, conflicting data sources/methodology, little use of data to develop campaigns or identify product development opportunities** **Some areas lack a range of quality tourism products** Need new developments to sustain their viability as a tourism destination. **Support of product development is reactive rather than proactive/strategic** **There is a lack of skilled employees and**	**established with Central NSW, New England North West, North Coast, Northern Rivers, Central Coast, Greater Sydney and Blue Mountains** **Develop an international brand distinct from domestic branding by working closely with the private sector and Tourism NSW** **Opportunities such as Newcastle Airport, Australia's Hunter Valley Wine Centre, Labour supply and customer service training** **Maximise use of existing VICs** **Introduce technology based integrated distribution/sales system** **Cooperative marketing opportunities** **Service issues need to be reviewed at customer contact points i.e. pre-visit queries and room service standards. Operators to attempt to exceed customer expectations at all times** **Newcastle—aim to attract leisure visitors, reposition itself, focus on strengths i.e. beach, sophisticated, regional, nature/culture.**

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43. There is a lack of skilled employees & difficulties attracting them 44. Many operators have poor business/tourism skills & need professional training 45. Lack of public transport 46. Poor customer service 47. Signage—increase to highlight attractions, towns, scenic drives etc. 48. TNSW not providing clarity, information or coordination for regional marketing. Inconsistent budgets, marketing, leadership & planning. 49. Marketing focuses on Sydney/regional NSW, yet their overnight visitation is declining & day trip visitation stagnant 50. New markets are required 51. International marketing position unclear, debate over desirable level of international focus, reactive approach 52. RTO doesn't collect or disseminate Region specific research 53. Research performed by STO not widely accessed or used by the Region 54. Structural labour supply issues—resolve through partnerships between operators & government. 55. Provide a new strategic marketing direction for region 56. Identify ways to attract new/growing markets &		**difficulties attracting them** Operators can't get trained staff, this will intensify when new developments are completed. Lack of career paths discourage interest in tourism careers. **Many operators have poor business and tourism skills and require professional training** **Lack of public transport** **Customer service is a critical issue** **Signage—increase to highlight attractions, towns, scenic drives etc.** **Tourism NSW is not providing clarity, information or coordination for regional marketing programs. Have inconsistent budgets, marketing, leadership and planning** **Marketing focuses on Sydney/regional NSW, yet their overnight visitation is declining & day trip visitation stagnant** **New markets are required** **International marketing position unclear, debate over desirable level of international focus, reactive approach** **RTO doesn't collect or disseminate region specific research** **Research performed by TNSW is not widely accessed or used by the region**	

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
examine potential linkages within the region & with other regions 57. Prioritise infrastructure development opportunities that will have maximum short to medium term impact 58. Increase conversion of consumer interest to purchase by improving information distribution, visitor services & use of IT 59. Ensure that the right structures are in place to deliver strategy 60. Establish product zones to increase tourism business by promoting their cluster of experiences to targeted consumer segments. 61. Newcastle Airport as opportunity to grow interstate visitation & fly/cruise options 62. Adopt standardised & integrated regional method to distribution & sales 63. Restructure the RTO to achieve greater industry representation 64. Need to ensure the sustainable growth of interstate passengers through the airport 65. Provide a new strategic marketing direction for the region, enable effective targeting & communication with visitors, identify areas for product development 66. Increase interstate visitation i.e. drive & fly-drive			

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markets 67. Whole of region approach 68. Inter-region cooperation is needed to expand opportunities 69. Develop an international brand distinct from the domestic brand by working with industry & TNSW 70. Newcastle Airport, Hunter Valley Wine Centre, labour supply & customer service training 71. Maximise use of VICs 72. Introduce technology based integrated distribution/sales system 73. Cooperative marketing opportunities 74. Service issues need to be reviewed at customer contact points 75. Aim to attract leisure visitors, reposition itself, focus on strengths			

Victoria

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Tourism Victoria 2005 **Mornington Peninsula: regional Tourism Development Plan 2004–2007** Contact: Paul Albone, email. paul.albone@tourism.vic.gov.au http://www.tourism.vic.gov.au/images/stories/Documents/About_Us/mornington-peninsula-rtdp-2005-update.pdf Key issues: 1. Progress regional tourism industry development issues 2. Develop accommodation—use of existing historic buildings 3. Strengths: food & wine, diverse natural attractions, gardens, arts & cultural heritage & touring 4. Grow yield, dispersal & satisfaction 5. Enrich destination brand equity 6. Develop packaged products 7. Explore opportunities for commercially viable ferry services 8. Link events with food & wine strengths & spread evenly throughout the year 9. Develop events—extend winter wine event, explore food & wine/music event 10. Commonwealth Games 11. Professional development program for regional tourism managers 12. Encourage operator participation in consumer	**Progress regional tourism industry development issues** **Possibility of developing accommodation—use of existing historic buildings** **Strengths: food and wine, diverse natural attractions, gardens, arts and cultural heritage and touring** **Grow visitor yield, dispersion and satisfaction** **Enrich destination brand equity** **Develop packaged products** **Explore opportunities for commercially viable ferry services** **Link events with food and wine strengths and spread evenly throughout the year** **Develop events—extend the winter wine event and explore a food and wine/music event** **Commonwealth Games**	**Professional development program for regional tourism managers—career development, planning, marketing, research and leadership** **Encourage operator participation in consumer assessment of their business programs** **Proliferation of individual signing, the roles and responsibilities of the various groups and organisations have in relation to signing and enforcement/compliance issues.** **Work with and guide regional tourism organisations and local government regarding core roles and responsibilities and integration of strategic planning** **Signage–development of tourism signage policy and guidelines** **Need to maintain and grow tourism funding**	**Marketing: include food & wine as core product strengths in all marketing strategies. Interstate tactical marketing activities** **Development of restaurant and gallery guides and an ambassador card targeted at the holiday home market** **Educate local government representatives on the importance and value of tourism, the importance of high service standards, visitor satisfaction and the needs of high yielding markets and the requirements and expectations of international inbound operators and international wholesalers** **Research into visitor satisfaction** **Research to determine the value of tourism**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
assessment of their business programs 13. Proliferation of individual signing, the roles & responsibilities of the various groups & organisations have in relation to signing & enforcement/compliance issues. 14. Work with & guide regional tourism organisations & local government regarding roles & responsibilities & integration of strategic planning 15. Signage—development of tourism signage policy & guidelines 16. Need to maintain & grow funding 17. Marketing: include food & wine as core product strengths in all marketing strategies. Interstate tactical marketing activities 18. Development of restaurant & gallery guides & an ambassador card targeted at holiday home market 19. Educate local government on importance & value of tourism, high service standards, visitor satisfaction, needs of high yield visitors & expectations of inbound operators/international wholesalers 20. Research into visitor satisfaction 21. Research into value of tourism			

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Geelong Otway Tourism 2007 **Strategic Plan 2007–2010** http://www.geelongotway.org/uploads/395616632___2007-2010StrategicPlan.pdf Key Issues: 1. Cooperative marketing campaigns 2. Strong voice on tourism issues 3. Access to visitor resources 4. RTO links with tourism industry & state & federal tourism agencies 5. Coordinated, strategic & progressive tourism region 6. RTO understands target markets 7. Tourism product meets market demands 8. Opportunity to increase economic/social benefits of tourism through visitor businesses/employment 9. Numerous industry operators in region 10. Increase visitation 11. Increase accommodation 12. Increase quality of product 13. Need to improve capability of tourism industry 14. Lack of tourism infrastructure 15. Take a bottom up approach to industry 16. Provide knowledge & advice on tourism industry research & trends. 17. RTO to deliver exceptional service to stakeholders 18. Increase collaboration &	**Cooperative marketing campaigns** Maximising marketing effort through cooperative and coordinated approach. Continue to deliver strong marketing and development initiatives to grow the regions tourism industry. Conduct marketing activities in partnership with the tourism industry and relevant bodies. Ongoing development of the capability of the Geelong Otway region to deliver on market demands. **Strong voice on tourism issues** **Access to visitor resources** i.e. visitor information centres, websites and visitor guides. **Links with tourism industry and state and federal tourism agencies** Open and effective communication between RTO and tourism industry partners. Maintain effective partnerships with all levels of government and their relevant organisations and bodies. **Well coordinated, strategic and progressive tourism region** A coordinated, regional approach to tourism policy with a commitment to sustainability. **RTO understands target markets** RTO has a thorough understanding of the regions tourism markets and implements effective marketing programs for growth. Need to further understand market requirements and trends. **Tourism product in the region meets market demands** **Opportunity to increase economic/social benefits of tourism through visitor businesses and employment.**	**Numerous industry operators in region** There are more than 1,000 tourism industry operators across the region. **Need to increase visitation** **Need to increase accommodation** **Need to increase quality of product** **Need to improve the capability of the tourism industry** Provide access for tourism operators in the region to programs that improve the capacity of the industry. **Lack of Tourism infrastructure** Tourism infrastructure is a development priority. Support for infrastructure and services to benefit both residents and visitors.	**Take a bottom up approach to tourism industry** Where tourism businesses directly join their local Tourism Association (LTA). These LTA's are then affiliated with GOT through a series of partnership arrangements. **Provide knowledge and advice on tourism industry research and trends** **RTO to deliver exceptional service to stakeholders, customers and the tourism industry** **Increase collaboration and participation** Encourage effective collaboration between relevant tourism stakeholders within the Geelong Otway region. **Pursue tourism economic growth that benefits the community and engage community to increase awareness** Engage the communities within the region to develop an appreciation for tourism and its benefits. Encourage communities within the region to be supportive and vital partners to the tourism industry. **Foster sustainable tourism** All actions underpinned by commitment to deliver sustainable tourism. **Provide expertise and leadership** Provide regional industry knowledge and contribute to state/national policies/ programs. **Target high yield and encourage dispersal both geographically and seasonally to create more profitable and stable industry** **Manage effective relationships with**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
participation 19. Pursue tourism economic growth to benefit community & engagement to raise awareness 20. Foster sustainable tourism 21. Provide expertise & leadership 22. Target high yield & encourage dispersal (both geographically & seasonally) 23. Manage effective relationships with stakeholders relevant to tourism in the region 24. RTO to be transparent in business operations	Strengthen local economies and generating greater employment opportunities.		**stakeholders relevant to tourism in the Geelong Otway region** **RTO to be open and transparent in all business operations.** Ensure the effective deployment of, and accountability for, RTO resources.

Queensland

Document Details	Strengths and Opportunities	Challenges, Weaknesses and Threats	Recommendations and Strategies
Tourism Queensland 2004 **Sunshine Coast Destination Management Plan** http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=63FFE5CD-D5BC-D9C0-D1B2-D3A528A8B0CD&siteName=tqcorp_06 1. A range of visitor safety programs 2. Region has good domestic seating capacity 3. Range of research & information available 4. Many strengths: beaches, weather, international hotel brands, good reputation, diverse hinterland experiences 5. Ample tours & activities 6. Good domestic air access 7. Number/range of events & festivals—may need better coordination 8. Diverse range of hospitality & retail services, but lack of consistent service & prices sometimes too high 9. Special interest pursuits—seafood, golfing, gay & lesbian, nudist beach, art, cooking classes & wine appreciation, spa, health & well-being, farmers market & farm tourism, walking trails, cycling, climbing, interpretative experiences, Indigenous tourism, mountain biking & equestrian activities 10. Range of tourist information	**Queensland has a range of visitor safety programs** **Sunshine Coast region has good domestic seating capacity** May need to address interlining and group management issues related to Jetstar. **Good range of research & information available to tourism industry** Tracking and forecasting of tourism demand and supply for Queensland and destinations; estimates of the contribution of tourism to Queensland and its destinations; tools that model the impact of shocks or tourism policy initiatives on the Queensland economy; standard visitor surveys that profile visitors to Queensland destinations and identify issues with tourism infrastructure and tourism product services; research that profiles market and accommodation sectors; research that assists market segmentation and the positioning and branding of destinations. Quantitative and qualitative consumer research, providing an overview of consumer perceptions, needs and desires. **Sunshine Coast has many strengths, beaches, weather, international hotel brands, good reputation, diverse hinterland experiences** A variety of beautiful beaches, warm and sunny weather, range of accommodation, presence of internationally recognised hotel brands, reputation of style and sophistication—currently associated with Noosa, availability of hinterland experiences—arts and craft, B&Bs, winery trails, access to World Heritage listed Fraser Island. **Ample tours and activities**	**Improve customer service/training** Industry complacency and variation in standards of customer service is common. In peak times service standards at restaurants fall—insufficient capacity to deal with peaks in demand. Tendency for restaurants to churn customers through quickly. In off-peak/ shoulder seasons opening hours of restaurants are restricted due to low demand. The quality of hospitality staff is compromised by the regions seasonal tourism activity and the inability to retain skilled staff. Targeted public relations and hospitality training programs may improve customer service and understanding of consumer needs. Training and education to improve industry performance should initially be targeted towards managerial staff. **Community services** Limited understanding of the economic and social value of tourism by local residents, high visitor numbers on weekends and peak winter periods impacts on community facilities and services and leads to resistance to tourism by some local residents. **Lack of infrastructure i.e. national Parks, to support 'health and wellbeing'** e.g. access, interpretive/directional signage, walking trails, toilets, BBQs, not highly recognised for its bush walking experiences. **Limited integrated public transport links between the coast and the hinterland** **Congested road access from Brisbane and poor parking** Road access from Brisbane is problematic, current capacity of the Bruce Highway and regional road systems are creating access difficulties during peak periods. Public	**Improve positioning, awareness and appeal** Position the Sunshine Coast as a holiday destination that successfully competes in the domestic and international marketplaces. Enhance awareness and appeal of the Sunshine Coast as an integral part of a diverse 'Southern Queensland' tourism experience. Enhance promotion of the Sunshine Coast through continual participation in familiarisations, trade shows and other marketing activities conducted for 'Southern Queensland' **Sustainable growth and profitability** Through effective distribution of tourism information, products and services. **Appropriate tourism research that is available online** To aid policy and planning to enhance the visitor experience. On-line access to up-to-date destination and product information for both trade and consumers. **Facilitate effective partnerships and alliances with all stakeholders** **Develop appropriate packages** That are fitted to identified consumer needs. **Enhance distribution of the product** **Continue to grow the international markets by nurturing existing wholesale and retail relationships** Increase representation of Sunshine Coast product in international wholesaler programs and activities. **Develop diverse packages**

Document Details	Strengths and Opportunities	Challenges, Weaknesses and Threats	Recommendations and Strategies
& Services 11. Increase business & conventions 12. Opportunity to improve signage 13. Accommodation—mostly B&Bs and motels, need development in backpacker/ family/business markets 14. Natural attractions 15. Built attractions 16. Develop quality interpretive, educational & entertaining experiences 17. Customer service & training 18. Tourism industry provides a significant level of employment 19. Popular with NZ visitors 20. High proportion of visitors are from Queensland 21. High proportion of visitors & nights are from the leisure/holiday market 22. High proportion of nights from interstate visitation 23. Average commercial occupancy & yield trending upwards recently 24. Offers diverse range of visitor experiences 25. Perceived as relatively unspoilt, less urbanised & crowded, not too 'touristy' & relaxed 26. Product increasingly available on the internet 27. Presence of internationally recognised brands 28. Has a domestic & is close to an international airport 29. Noosa & Fraser Island have strong & positive consumer perceptions	Includes boat and kayak hire, surfing, jet-skiing, diving and snorkelling, fishing charters, four wheel driving along the beach north of Noosa, camel riding, hang gliding and skydiving. Popular activities include shopping, restaurants and cafes, wineries, and nature-based activities, including bushwalking, horse riding, ballooning, gliding, canoeing, rock climbing, abseiling and mountain bike riding. A number of scenic tourist drives established through the hinterland—self-drive activities. Organised tours of the hinterland are primarily river cruises and small minibus and 4WD tours. **Good domestic air access—scope for improvement in rail, road, buses and international air transport** The Sunshine Coast Airport facilitates domestic air travel, with both Jetstar and Virgin Blue flying direct from the southern capitals of Sydney and Melbourne to the Sunshine Coast. Despite this, Brisbane Airport is still the primary gateway to the region. There is scope for improvement in the transport network on the Sunshine Coast, including road, rail, buses and air transport. There is also scope for the development of a network of walking/bike trails throughout the region. The need to improve facilities for disabled travellers should also be explored. **Number and range of events and festivals—may need better coordination** There are a number of small to medium scale events that are striving to attract similar markets. There is scope for better coordination of these events across the region through the development of an events cluster. This would establish a more even spread of events throughout the year and the development of a more comprehensive regional events calendar. Public liability and competition for limited sponsorship funding	transport in the region could be further integrated. Limited available parking in major regional centres. Range road from Nambour to Noosa is in poor condition. **Lack of opportunities to distribute local produce direct to consumer i.e. farmers market (other than Eumundi)** **Train services require an increase in frequency with more express services offered** **Limited level of affordable three to three and a half star accommodation** **Lack of coordination of nature-based, sport and soft adventure opportunities** e.g. mountain biking, eco-tourism, car rallies. **Apathy to tourism by some operators leads to non-suitable product being offered and poor service, opening hours of businesses vary** **VICs are volunteer based** Subject to differing opening hours, local and regional knowledge, cross selling of product and service standards with no booking facilities, there is no coordination of VICs across shires, no existing audit of human talent, such as arts and craft and the cottage industries available, during peak times there is no facility for a bed bank **Non regional products/produce are sold as 'local' resulting in a credibility issue** **Lack of directional signage and a lack of a 'sense of arrival' from both north and south routes** **Inconsistent customer service, a lack of nightlife and limited operating hours**	To meet the need of various source regions/countries and demand types, utilise short-term international diversion opportunities in the context of war and terrorism in other locations. **Collaboration between STO, RTO, industry, local councils and educational institutes to ensure appropriate training is developed and accessible** **Consumer research** Undertake research to improve understanding of consumer preferences and travel trends of primary and emerging international markets. Monitor and analyse international market trends and the changing needs and interests of international travellers. Continue to review available consumer research to identify new product development and packaging opportunities. **Differentiate based on strengths** Differentiate the region clearly from key competitors by establishing a distinctive and attractive brand based on strengths. **Raise awareness of the destination** Raise the level of awareness of the destination and its attributes through the development of an ongoing strategic PR plan. **Develop an on-line marketing strategy** **Attempt to reduce seasonality** **Cooperative marketing** Maximise destination exposure and marketing impact by encouraging operator participation in TQ's Partnership Advertising Programme. Encourage TSC to proactively promote and

Document Details	Strengths and Opportunities	Challenges, Weaknesses and Threats	Recommendations and Strategies
30. Niche markets/events add variety & provide reasons for non-peak travel 31. Good potential for growth in the relatively untapped C&I market 32. Close proximity to the large population 33. Internationally, region seen as ‘new’ & ‘untapped’ 34. Hinterland experiences are perfectly aligned to the South East Queensland Country program 35. Good level of industry participation in cooperative marketing initiatives 36. Good relationships exist between TQ & the RTO, LTOs & the levy boards 37. Council levies on businesses contribute to marketing funds 38. Local government knowledge & involvement in tourism 39. Development 40. Good range of tourism services 41. Public amenities & utilities are well provided for with attractive foreshores, picnic areas & BBQs 42. Enhance coordination between TQ, TSC & LTOs, increase understanding of regional issues 43. Industry trends 44. Increased competition 45. Increased consumer confidence, availability of public funds to enhance the range, diversity & standard of tourism infrastructure	are inhibiting factors. Opportunity to develop a limited number of major annual events with the capacity to attract national and international interest could be explored. Hinterland offers a number of festivals held throughout the year i.e. ‘From Chainsaw to Fine Furniture’ Woodworking Expo, King of the Mountain Race, Country Music Muster, Maleny Scarecrow Festival, Opera in the Rainforest, Gold Rush Festival and Woodford Festival, flower and garden shows and cultural events such as those held at Montville cultural precinct. A problem is the increasing cost of public liability premiums. **Diverse range of hospitality and retail services—lack of consistent service standards & price sometimes too high** The coastal area has a wide diversity of cafes and restaurants, particularly around Noosa and Mooloolaba. A consistent and acceptable standard of customer service is lacking however, and the price is sometimes perceived by visitors as too expensive. Visitors also complain of a lack of nightlife and entertainment. There is scope for the further development of high quality retail shopping experiences within the main tourism precincts. The quality, range and price of products for sale are considered too limited for tourists. Numerous restaurants and cafés in the hinterland region, offering a variety of interesting and alternative cuisine experiences. The sale of imported and mass-produced souvenirs threatens the livelihood of the area as a unique arts and craft centre. There is an opportunity to increase awareness of the types of products and experiences offered by the various towns throughout the hinterland. This would be assisted by an audit of the human talent and developing cottage industries to establish what is produced within the area. Awareness could also be increased through communication	**Mixed standard of accommodation quality due to reluctance of some owners to invest in upgrades and refurbishments** **Limited coordination of the VICs across the Sunshine Coast** e.g. standardisation of layout services provided, booking mechanisms, service standards, variable service quality and technical booking capability in tourist information and booking centres. **Level of customer service varies greatly between establishments** **Airport services charges for international flights** **High cost of public liability insurance limits activities, festivals and events** **Limited understanding of important infrastructure and product development needs** **Failure of some businesses to recognised their involvement in the tourism industry** **Negative attitude by some operators towards wholesalers and inbound operators** **Low industry awareness of the requirements of international markets** **Resistance towards tourism by local community due to a lack of understanding and knowledge of the benefits of tourism** **Confusion of roles for RTO, LTOs and Levy Boards** **Low awareness of tourism issues generally in local government**	support cooperative marketing and advertising initiatives to industry, ensuring TQ’s commitment and contribution is noted. Maximise budget and exposure of the Sunshine Coast by identifying opportunities to participate in cross regional marketing opportunities. **Identify product and packaging opportunities** **Industry/government education** Work with TSC to educate industry on areas such as the availability and findings of consumer destination research, changes in trends/habits and distribution channels. Continue to work with TSC and key stakeholders to further develop and enhance relationships and the understanding of tourism and its impact on the sustainable growth of the Sunshine Coast. Continue to educate industry on the Sunshine Coast hinterland as to the benefits of the South East Queensland Country campaign and encourage participation in the cooperative program. **Measure impact of marketing and monitor brand health** **Monitor and forecast destination performance and consumer and market trends that impact on tourism** **Work to improve access/transport** Improve capacity of Bruce Highway. Pursue further air access opportunities. Encourage Queensland Rail to increase rail services. Work with Sunshine Coast ROC and other relevant agencies to enhance internal transportation options, including public transport and parking. Facilitate development of internal transportation options to alleviate

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46. Increased environmental awareness, tourism leveraging off world heritage & protected areas 47. Innovation in distribution, communication & transportation technologies 48. Need to improve customer service & training 49. Community services 50. Lack of infrastructure i.e. national Parks, to support 'health & wellbeing' 51. Limited integrated public transport links between the coast & the hinterland 52. Lack of opportunities to distribute local produce direct to consumer i.e. farmers market (other than Eumundi) 53. Train services require an increase in frequency with more express services offered 54. Limited level of affordable three to three and a half star accommodation 55. Lack of coordination of nature-based, sport & soft adventure opportunities 56. Apathy to tourism by some operators leads to non-suitable product being offered & poor service, opening hours of businesses vary 57. VICs are volunteer based 58. Non regional products/ produce are sold as 'local' resulting in a credibility issue 59. Lack of directional signage & a lack of a 'sense of	and cooperation between the local operators. One area that could be standardised is opening hours, which are currently varied and inconsistent. Although there is good local produce, there are opportunities to develop more local products, such as jam, homemade ice-cream and cheese. These could be sold through the markets and various local outlets. **Special Interest Pursuits—seafood precinct, golfing, gay and lesbian, nudist beach, artistic, cooking and wine appreciation, spa, health and well-being, farmers markets and farm tourism, interpretative experiences, Indigenous tourism, walking trails, cycling, mountain bike riding and equestrian activities** Using local produce and seafood, there is potential to develop the coastal dining precincts into sophisticated cuisine experiences. The series of high quality golf courses provide opportunity to develop a golfing niche market. Noosa also attracts gay and lesbian holiday-makers following the Sydney Mardi Gras. Noosa boosts a popular nudist beach. Artistic character of the hinterland provides opportunity for a range of creative tourism experiences (i.e. painting/ art/pottery classes, music, photography and art/gallery trails). Cooking classes and wine appreciation. Spa, health and well-being. Farmers market, permaculture activities, farm stays and farm activities. Interpretive experiences of local flora and fauna, bird watching and the Aboriginal customs and traditional way of life in the Glass House Mountain area. Develop and promote further walking trails, cycling, mountain bike riding and equestrian activities. **Range of tourist information and services—could be improved** The region has a range of accredited VICs,	**Low awareness of tourism product development issues in RTO and tourism levy boards** **Lack of international market share and dependency on the domestic market, with its low growth forecast** **The Sunshine Coast suffers from seasonality with peak periods during school holidays and weekends** **Sub-regions compete with their own branding and marketing** **Sunshine Coast is often confused with Gold Coast in the minds of targeted consumers i.e. the negative perceptions of being too developed and 'touristy'** **Lack of coordination and promotion of special events** **Limited understanding of opportunities to capture greater international share** **Lack of funding available for international marketing** **Limited understanding by operators of the retail, wholesale and inbound distribution systems** **Destination lacks tourism icons** **Impacts of the increasing profile of the destination, lifestyle advantages and the influx of interstate residents have include rising land values, increased rates and limited rental availability** **Very strong reliance on tourism, currently sixteen percent of GRP the highest in**	congestion on the coastal strip and during peak periods. Forge stronger relationships with appropriate agencies, such as DMR and the Council Public Works divisions to help achieve more tourism related transportation outcomes. **Improve directional and interpretive signage** Work with the RTO and LGA to establish a 'sense of arrival' through signage. Continue to work with LGA and the district signage committee to ensure the signage and collateral are best practice and support the tourism opportunities in the region. **Maintain audit of existing tourism product and identified gaps** **Work with existing cluster groups and encourage the development of new cluster groups for identified product needs** **Sustainable Product development** Facilitate the development of tourism product relevant to international market demand. Continue to work with all stakeholders to ensure development is appropriate and sustainable. Work with key industry organisations to further investigate and support the development of facilities to suit emerging and special interest markets. **Develop an events cluster and coordination of regional events** **Improve nightlife and services** Work with industry and appropriate agencies to promote extended trading hours. **Coordinated information and booking service**

Document Details	Strengths and Opportunities	Challenges, Weaknesses and Threats	Recommendations and Strategies
arrival' from both north & south routes 60. Inconsistent customer service, a lack of nightlife & limited operating hours 61. Mixed standard of accommodation quality due to reluctance of some owners to invest in upgrades & refurbishments 62. Limited coordination of the VICs across the Sunshine Coast 63. Congested road access from Brisbane & poor parking 64. Level of customer service varies greatly between establishments 65. Airport services charges for international flights 66. High cost of public liability insurance limits activities, festivals & events 67. Limited understanding of important infrastructure & product development needs 68. Failure of some businesses to recognise their involvement in the tourism industry 69. Negative attitude by some operators towards wholesalers & inbound operators 70. Low industry awareness of the requirements of international markets 71. Resistance towards tourism by local community due to a lack of understanding & knowledge of the benefits of tourism 72. Confusion of roles for RTO, LTOs & Levy Boards	located at Caloundra, Mooloolaba, Maroochydore, Sunshine Coast Airport, Coolum, Noosa and Gympie. There is opportunity for greater use of IT and the establishment of a cross-region centralised VIC booking service. There is a growing need to review the current information centres, the services offered, how information is provided before the consumer arrives, as well as consumer needs and perceptions. There is a need for enhanced cooperation between the local Authorities to increase the coordination of the visitor centres and to align all the Sunshine Coast Information Centres under the Sunshine Coast banner. Coordination could also occur through the application of technology, i.e. establishing and managing a computerised database with booking facilities. Coordination is also important for the information services that are provided, ensuring consistent procedures and policies, and standardised letters and information kits. Research notes a need for an accredited professional hinterland gateway information centre with localised information centres. The current limitation is lack of resources. Many of the centres are volunteer-based, which can result in varying levels of customer service, based on the range of skills, knowledge and experience of the individual volunteers. **Increase business and conventions** Positioned to capture a greater share of the business and conference market. The region has sufficient infrastructure to cater for the needs of small to medium size conventions and meetings. Sunshine Coast Convention Bureau is actively pursuing this market. **Opportunity to improve signage** Consistent guidelines from the councils would generate continuity in the style of	**Queensland** **Impacts of the increasing profile of the destination, lifestyle advantages and the influx of interstate residents have included rising land values, increased rates and limited rental availability** **Low overall international market share** **Limited international source markets—NZ/Europe** **Low average annual growth rate in domestic overnight visitors over the past three years** **Significant seasonal volatility** **Burgeoning population coupled with the growth of tourism is creating traffic, crowding and parking issues for local townships** **Planning and regulation** Issues for the hinterland of the Sunshine Coast relating to policy, planning and regulation are problematic as the region is under the jurisdiction of the various local councils. There is a need for greater communication between these councils on such issues to ensure consistency across the entire region. Within the hinterland community there is a perceived lack of control over planning decisions that affect the area. This could be addressed by increased consultation and awareness amongst the community on how they can influence decisions that affect their region. **Regional and operator tourism signage issues** Review of the District Tourism Signage Committees (DTSCs) who are the lead	Develop a coordinated regional approach for the provision of information through collateral, information centres, internet, email and telephone enquiries. Explore and facilitate the opportunity of establishing a regional booking service **Ensure visitor access and awareness of information and issues regarding visitor safety** Such as safe beach usage. **Promote the value and benefits of tourism to the local community** **Educate and consult with LGAs, RTO, LTOs and tourism levy boards to enhance knowledge and understanding of tourism generally** **Identify tourism training needs and facilitate development and delivery of appropriate training to underpin quality customer service delivery** **Ensure research is appropriate, accurate and timely** **Improve R-TAM** Encourage participation in the R-TAM research, enhance availability of the output from the R-TAM research. **Work to promote the sale of local products and produce** **Enhance coordination/prioritisation of tourism in planning and funding at local, state and federal levels** **Work to reduce the impact of public liability insurance** **Undertake and distribute research at a regional and sub-regional level to**

Document Details	Strengths and Opportunities	Challenges, Weaknesses and Threats	Recommendations and Strategies
73. Low awareness of tourism issues generally in local government 74. Low awareness of tourism product development issues in RTO & tourism levy boards 75. Lack of international market share & dependency on the domestic market, with its low growth forecast 76. The Sunshine Coast suffers from seasonality with peak periods during school holidays & weekends 77. Sub-regions compete with their own branding & marketing 78. Sunshine Coast is often confused with Gold Coast in the minds of targeted consumers i.e. the negative perceptions of being too developed & 'touristy' 79. Lack of coordination & promotion of special events 80. Limited understanding of opportunities to capture greater international share 81. Lack of funding available for international marketing 82. Limited understanding by operators of the retail, wholesale & inbound distribution systems 83. Destination lacks tourism icons 84. Impacts of the increasing profile of the destination, lifestyle advantages & the influx of interstate residents have include rising land	tourism signage and maintain signage quality. Cooperation across the councils would generate synergy for both interpretive and directional signage, and the signage for local amenities, property, billboards, events and informative maps. **Accommodation—mostly B&Bs/motels, some cater for weddings/meetings, lack affordable family/ backpacker accommodation and hotels/motels attached to meeting facilities** Accommodation in the hinterland is primarily comprised of B&Bs and motels, with an average star rating of around three to four stars. The providers are usually individual operators offering small-scale, unique accommodation. Several venues are developing facilities to cater for weddings and meetings. Scattered through the hinterland are also a number of caravan parks, however the hinterland is lacking affordable accommodation that is suited to the family and backpacker markets. There are further opportunities for accommodation that provides meeting facilities to cater for corporate meetings and executive retreats. **Natural attractions** Hinterland offers scenic walks and drives through the various national parks and state forest reserves, with a number of lookouts. Natural attractions include the Glass House Mountains, the subtropical rainforest at Mary Cairncross Reserve, Kondalilla Falls, the Mary Valley and the Noosa River Everglades. A number of walks and trails are being developed. **Built Attractions** Hinterland experiences are offered in and around the local towns. The popular hinterland towns for arts and craft include Montville and Maleny. There are markets,	agency for dealing with operator and regional tourism signage issues. Membership of the national Tourism Signing Reference Group to ensure national consistency of signage **Low awareness of tourism issues generally in local government** **Low awareness of tourism product development issues in RTO and tourism levy boards** **Access and transport constrained** Access to the hinterland from southern population areas is often constrained by congestion during peak holiday periods. Although there are currently sufficient services to the Sunshine Coast Airport from Sydney and Melbourne. Within the Sunshine Coast the Range Road that links Nambour to Noosa is in poor condition, restricting access to the hinterland from the coastal area. The extent and duration of road upgrades to the southern access of the Blackall Range could have an impact on visitor flows to the region in the short term. The level of drive visitation to the small hinterland towns, such as Montville and Maleny, creates issues regarding the level of available parking during peak periods. The hinterland hubs for public transport are Landsborough, Palmwoods and Nambour. There are opportunities to increase the level of integration of the transport services, such as the trains and coaches at these hubs. This would capitalise on the existing service levels. The facilities offered at these transport hubs, their maintenance and signage should also be reviewed. In addition, the train services could be enhanced with an increase in the number of services and the greater use of express services. **High visitor numbers on weekends and**	**support decision making** **Improve coordination** Work to avoid duplication of resources and processes, and improve focus and coordination of tourism into policy, planning and development **Enhance cooperation/coordination between RTOs and LTOs** **Foster engagement of the industry in marketing and development planning** **The sale of imported and mass-produced souvenirs threatens the livelihood of the area as a unique arts and craft centre** **Increase awareness of the types of products and experiences offered by the various towns in the hinterland** i.e. through communication and cooperation between the local operators. **Standardise opening hours** **Undertake an audit of the human talent and developing cottage industries to establish what is produced within the area**

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values, increased rates & limited rental availability 85. Very strong reliance on tourism, currently 16% of GRP the highest in QLD 86. Impacts of the increasing profile of the destination, lifestyle advantages & the influx of interstate residents have included rising land values, increased rates & limited rental availability 87. Low overall international market share 88. Limited international source markets—NZ/Europe 89. Low average annual growth rate in domestic overnight visitors over the past three years 90. Significant seasonal volatility 91. Burgeoning population coupled with the growth of tourism is creating traffic, crowding & parking issues for local townships 92. Planning & regulation 93. regional & operator tourism signage issues 94. Low awareness of tourism issues generally in local government 95. Low awareness of tourism product development issues in RTO & tourism levy boards 96. Access & transport constrained 97. High visitor numbers on weekends & during holiday periods impacts on community services & leads	restaurants, coffee shops, wineries, alternative-style eateries and produce stores, art galleries, boutiques and curiosity shops. The hinterland has a wide range of family-oriented built attractions, including zoos and theme parks such as Australia Zoo, Aussie World, The Big Kart Track, Yandina Ginger Factory, The Big Pineapple and Bli Bli Castle. Gympie is a gold-mining township offering a historic tourism experience that offers an historic steam train through the scenic Mary Valley to Imbil. Capacity to develop quality attractions based on local products. **Opportunity to further develop quality interpretive, educational and entertaining experiences based on the region's heritage, creative industries, and the food and wine industry** **Customer service and training** Research indicates that the level of customer service provided to visitors to the hinterland is generally positive, highlighting the friendly service received. Despite this, there appears to be a wide range in the standard of service provided by local establishments. Programs to assist in developing high standards of hospitality would generate a consistent standard of service throughout the hinterland. **Tourism industry provides a significant level of employment** The tourism industry contributes twenty percent of the employment in the region and $733 million to the local economy. **Popular with NZ visitors** **High proportion of visitors are from QLD** **High proportion of visitors and visitor nights are from the leisure/holiday market**	**during holiday periods impacts on community services and leads to resistance to tourism by some local residents** **Limited understanding of the economic and social value of tourism by local residents, as there are 4 shires within the region, community services vary** **Economic trends—globalisation, fluctuating global economy, variable exchange rates and the value of the Australian dollar, variable interest rates, fluctuating fuel prices, decline in traditional industries, polarisation of wealth** **Natural environment—global warming/climate change, increased awareness of environmental sustainability, increased interest in nature-based tourism, impacts of tourism on natural environments, natural disasters, environmental degradation** **Political and legal trends—recognition of tourism by government and community, policies on environment, policies on Native Title, threat of war and terrorism, land clearing, public liability insurance costs** **Social and cultural trends—changing family structure, ageing population, increasing number of hours worked, flexible work arrangements, interest in balanced lifestyle, safety and security, population growth in developed countries, population growth in urban and coastal areas, health risks** **Technology trends—uptake of the internet, interactive TV, mobile technology, convergence of communication, innovations in**	

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to resistance to tourism by some local residents 98. Limited understanding of the economic & social value of tourism by local residents, as there are four shires within the region, community services vary 99. Economic trends—globalisation, fluctuating global economy, variable exchange rates & the value of the Australian dollar, variable interest rates, fluctuating fuel prices, decline in traditional industries, polarisation of wealth 100. Natural environment—global warming/climate change, increased awareness of environmental sustainability, increased interest in nature-based tourism, impacts of tourism on natural environments, natural disasters, environmental degradation 101. Political & legal trends—recognition of tourism by government & community, policies on environment, policies on Native Title, threat of war & terrorism, land clearing, public liability insurance costs 102. Social & cultural trends—changing family structure, ageing population, increasing number of hours worked, flexible work arrangements, interest in balanced lifestyle, safety &	**High proportion of visitor nights from interstate visitation** **Average commercial occupancy and yield trending upwards over the past three years** **Offers a diverse range of visitor experiences** **Perception that the destination is relatively unspoilt, less urbanised and crowded, not too 'touristy' and relaxed** **Destination product increasingly available on the internet** **Presence of internationally recognised brands** **Has a domestic airport and is close to an international airport** **Noosa and Fraser Island have strong and positive consumer perceptions from which to leverage** **Niche markets and events add variety to the destination and provide incentives for non-peak travel** **Good potential for growth in the relatively untapped C&I market** **Close proximity to the large population of Brisbane** **Internationally the destination is seen as 'new' and relatively untapped** **Hinterland experiences are perfectly aligned to the South East Queensland Country program**	**transport—speed, comfort, safety** **Competitive trends—global on-line revolution, competition for discretionary income, greater number of substitutes for travel, greater competition in tourism** **Industry trends—short break holidays, more frequent holidays, drive holidays, on-line revolution for information & booking holidays, unstable global environment and impacts on travel behaviour, predicted growth in international travel, relaxed travel impediments in developing international markets, highly competitive national travel environment, market fragmentation and the emergence of more special interest markets** **Lack of a coordinated approach across the four shires to destination marketing, development opportunities, and policy and planning regulations** **A reluctance of operators to book one night stays** **In interstate markets, there is a lack of consumer awareness of Sunshine Coast location, boundaries and diversity of visitor experiences** **Legal/Political instability (war/terrorism), federal/state/local government involvement and policies on tourism and environment, government recognition of the benefits of tourism** Perception of domestic safety in the context of the global threat of war and terrorism, ageing population with increased disposable income/leisure time, interstate migration—increasing population and VFR, increased	

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security, population growth in developed countries, population growth in urban & coastal areas, health risks 103. Technology trends – uptake of the internet, interactive TV, mobile technology, convergence of communication, innovations in transport - speed, comfort, safety 104. Competitive trends - global on-line revolution, competition for discretionary income, greater number of substitutes for travel, greater competition in tourism 105. Industry trends - short break holidays, more frequent holidays, drive holidays, on-line revolution for information & booking holidays, unstable global environment & impacts on travel behaviour, predicted growth in international travel, relaxed travel impediments in developing international markets, highly competitive national travel environment, market fragmentation & the emergence of more special interest markets 106. Lack of a coordinated approach across the four shires to destination marketing, development of opportunities, policy & planning regulations 107. A reluctance of operators to book one night stays 108. In interstate markets, there	**Good level of industry participation in cooperative marketing initiatives** **Good relationships exist between TQ and the RTO, LTOs and the Levy Boards** **Council levies on businesses contribute to marketing funds** **Local government knowledge and involvement in tourism e.g. through levy boards** **Development** Implementation of visitor safety initiatives, growth in domestic airline capacity, TIPA working group to improve management of commercial operations in national parks, implementation of state Drive Tourism Strategy, good level of research for the destination. **Good range of tourism services** Good range of accommodation, restaurants, cafes, tours and activities, recent introduction of direct air services from Sydney and Melbourne to Sunshine Coast Airport. Visitor satisfaction is high in most areas. Sufficient infrastructure for small to medium conference and meetings market. The wine and arts and craft sectors add diversity. Good range of restaurants available, cooking schools offer a point of difference, range of good quality B&Bs, local events include Opera in the Park, Chainsaw to Fine Furniture, flower shows, Woodford and Scarecrow festival, consumer surveys acknowledge friendly service. **Public amenities and utilities are well provided for with attractive foreshores, picnic areas and BBQs** **Opportunity to enhance coordination**	work pressures and desire for work/life balance, traditional family structure changing—smaller family units and more couples, population growth in urban and coastal areas, e.g. source markets of south east Queensland. **Falling behind in communication and distribution technologies** **Beach holidays tend to be perceived as the same by consumers** **Competitors—currency fluctuations may assist international competitors, boost in competitor presence due to their financial marketing investments**	

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is a lack of consumer awareness of Sunshine Coast location, boundaries & diversity of visitor experiences 109. Legal/political instability, federal/state/local government involvement & policies on tourism & environment, government recognition of the benefits of tourism 110. Falling behind in communication & distribution technologies 111. Beach holidays tend to be perceived as the same by consumers 112. Competitors-currency fluctuations may assist international competitors, boost in competitor presence due to their financial marketing investments 113. Improve positioning, awareness & appeal 114. Sustainable growth & profitability 115. Appropriate tourism research that is available online 116. Facilitate effective partnerships & alliances with all stakeholders 117. Develop appropriate packages 118. Enhance distribution of the product 119. Continue to grow the international markets by nurturing existing wholesale & retail relationships 120. Develop diverse packages	**between TQ, TSC and LTOs and increase the understanding by LTOs of regional issues** Currently four LTOs work on some tourism initiatives and issues under the banner of the Sunshine Coast Information Centre Association (SCICA). **Industry trends** Tendency to short break holidays, trends in travel patterns for more frequent holidays, internet and e-commerce developments—implications for access, distribution and direct booking channels, continued travel market fragmentation. **Competitors** Direct air services from Sydney and Melbourne to the Sunshine Coast. Australia is seen as a 'safe destination' from an international perspective, destination offers both coastal and hinterland experiences, there is the presence of internationally recognised 'hotel brands' which provides credibility factor, destination has reputation of style and sophistication **Increased consumer confidence and implications for holiday spending, availability of public funds—to enhance the range, diversity and standard of tourism infrastructure** **Increased environmental awareness i.e. sustainability, tourism leveraging off the value of world heritage and protected areas** **Rapid innovation in communication, distribution and transportation technologies**		

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121. Collaboration between STO, RTO, industry, local councils & educational institutes to ensure appropriate training is developed & accessible 122. Consumer research 123. Differentiate based on strengths 124. Raise awareness of the destination 125. Develop an on-line marketing strategy 126. Attempt to reduce seasonality 127. Cooperative marketing 128. Identify product & packaging opportunities 129. Industry/government education 130. Measure impact of marketing & monitor brand health 131. Monitor & forecast destination performance & consumer & market trends that impact on tourism 132. Work to improve access/transport 133. Improve directional & interpretive signage 134. Maintain audit of existing tourism product & identified gaps 135. Work with existing cluster groups & encourage the development of new cluster groups for identified product needs 136. Sustainable Product development 137. Develop an events cluster & coordination of regional events			

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138. Improve nightlife & services 139. Coordinated information & booking service 140. Ensure visitor access & awareness of information & issues regarding visitor safety 141. Promote the value & benefits of tourism to the local community 142. Educate & consult with LGAs, RTO, LTOs & tourism levy boards to enhance knowledge & understanding of tourism generally 143. Identify tourism training needs & facilitate development & delivery 144. Appropriate training to underpin quality customer service delivery 145. Ensure research is appropriate, accurate & timely 146. Improve R-TAM 147. Work to promote the sale of local products & produce 148. Enhance coordination/prioritisation of tourism in planning & funding at local, state & federal levels 149. Work to reduce the impact of public liability insurance 150. Undertake & distribute research at a regional & sub-regional level to support decision making 151. Improve coordination 152. Enhance cooperation/coordination between RTOs & LTOs			

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153. Foster engagement of the industry in marketing & development planning 154. The sale of imported & mass-produced souvenirs threatens the livelihood of the area as a unique arts & craft centre 155. Increase awareness of the types of products & experiences offered by the various towns in the hinterland 156. Standardise opening hours 157. Undertake an audit of the human talent & developing cottage industries to establish what is produced within the area			
Gold Coast Tourism Bureau 2006 **Gold Coast Tourism: Five Year Plan** Steven Holle, email. Steven.holle@gctourism.com Key Issues: 1. Substantial increase in business tourism 2. Very likable with good appeal across segments 3. Tagline creating strong brand with high recognition 4. Stronger against competitor brands 5. Campaign is highly differentiating 6. Heavy investment in marketing 7. Growth in Sydney/ Melbourne markets 8. Record investments by industry underway 9. Risky strategy—over reliance on Japan & NZ 10. Low cost aviation strategy	**Substantial increase in business tourism** **Gold Coast is a very likeable destination with good appeal across all segments** **"VeryGC" creating a strong brand with high brand recognition** **Stronger against Sunshine and Singapore comparable brands** **Campaign is highly differentiating** **Heavy investment in marketing** **Growth in Sydney/Melbourne markets**	**Record investments by industry underway** **Risky strategy with over reliance on Japan and New Zealand** **Low cost aviation strategy to lure the Australian traveller overseas—threat to core domestic—Jetstar international flights**	**Global traveller is ready—fight for fair share** **Emerged markets—China, India and the Middle East** **Fast track BT especially incentive and associations** **At least a five year plan** **Visitation and speed of increasing tourism is dependent on investment and action** **Restructure GCT in terms of membership, governance, acknowledgement, additional marketing**

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to lure the Australian traveller overseas—threat to core domestic market 11. Global traveller is ready—fight for fair share 12. Emerged markets—China, India & the middle east 13. Fast track BT especially incentive & associations 14. At least a five year plan 15. Growth in tourism depends on investment & action 16. Restructure RTO in membership, governance, acknowledgement, additional marketing			
Tourism Queensland 2007 **Destination Management Plan for Tourism in South East Queensland Country, 2007–2010** http://www.tq.com.au/shadomx/apps/fms/fmsdownload.cfm?file_uuid=8D6D630B-C382-1795-6D6B-C88ED474684C&siteName=tqcorp_06 Key Issues: 1. Proximity to increasing population 2. Emerging middle class in developing countries 3. Increased use of new media technology—distribution channels 4. Demand for customised holidays 5. Oversupply of undifferentiated products and destinations 6. Develop food and entertainment product on rail services	**Proximity to increasing population** Of urban and coastal cities—increase in day and overnight trips. **Emerging middle class in developing countries** **Increased use of new media technology—changing distribution channels** Used for information, booking and sales channels. **Greater demand for customised holidays** **Oversupply of undifferentiated travel products and destinations will impact on competitiveness** **Opportunities to provide a SEQC experience in terms of food and entertainment exist for the Brisbane to Toowoomba rail service** **There is an increasing level of awareness among local governments that tourism planning, policy and regulation issues need to become a priority**	**Inconsistent industry and government support for tourism promotion and development in some sub-destinations** **Need to ensure the promise of marketing is matched by the product in the destination.** **B&B and farm stay issues—lack of research, accreditation and promotion** **Fluctuating global economies and variable exchange rates will continue to influence travel demand** **There will be more substitutes for travel** **Increased price sensitivity** **New hierarchy of destinations will take hold as Asia and India become more popular. Competition among countries will be more intense** **Global warming/climate change** **Tourism will become a regional, rather than a global phenomenon**	**Increase the value of tourism to all sub-destinations through better dispersal of visitors and off-season travel** **Develop sustainable destination experiences i.e. events** **Encourage innovation and investment through a planned approach** **Ensure a unified approach to the brand** **A lack of robust destination and regional statistical data to give a true indication of tourism's economic impact** **Increased competition from international and domestic destinations due to improved accessibility (e.g. low cost airlines), improved online product availability, diversification of product and development of new competitor destinations** **Strong network of accredited VICs** **Strong local government, community and primary produce support for the**

Document Details	Strengths and Opportunities	Challenges, Weaknesses and Threats	Recommendations and Strategies
7. local governments increasing awareness that tourism planning, policy & regulation issues need to become a priority 8. Road quality is good and meets visitor expectations 9. Good variety & range of hospitality & general retail services available 10. Increasing representation of arts and crafts, local fare & products 11. Number of good regional airports 12. Good quality and range of product & infrastructure 13. Strong collaboration between food and wine operators 14. Improvement of customer service & delivery of training to operators 15. Uniform tourism signage, tourist drives and welcome signage 16. Established community based events, festivals and conferences 17. Situated close to a significant short break market source (Brisbane) 18. Abundant natural attractions—wide range of nature-based experiences 19. Revitalising, relaxing non-coastal alternative experience 20. Authentic country history & heritage 21. Expanding wine tourism & accessible regional cuisine & produce	**Road quality is generally good and meets visitor expectations** **Good variety and range of hospitality and general retail services available** **There is an increasing representation of arts and crafts, local fare and products** **Number of good regional airports** **Good infrastructure—range of accommodation** **Strong collaboration between food and wine operators** **Improvement of customer service and delivery of training to tourism operators** **Uniform tourism signage, tourist drives and welcome signage** **Established community based events, festivals and conferences** **Situated close to a significant short break market source (Brisbane)** **Abundant of natural attractions offering a wide range of nature-based visitor experiences** **Revitalising, relaxing non-coastal alternative experience** **Authentic Queensland country history and heritage** **Expanding wine tourism experience and accessible regional cuisine and produce** **Variety of gardens and horticultural**	**High service expectations** **Variable fuel prices** **Increasing market fragmentation, growth in special-interest/niche markets** **More frequent short-break holidays** **Baby boomers retiring en masse from 2010 to 2020 will shape demand** **Increasing risk of pandemic disease** **Growing concerns for safety and security** **Ageing, affluent, active Western population** **Brisbane lacks things to see and do** **Regions competing with each other** **Perception of quality varies across events and there is a clashing of schedules with other destinations and limited succession planning.** **Non-acceptance of tourism by some local communities in some destinations** **Seasonality—four distinct seasonal experiences** **Low levels of awareness of product in some destinations** **Need for maintenance, further signage and improved traffic management** **Intra-regional transport is an issue. Current transport options are limited. Commercial bus and rail services have**	**tourism industry** **Environmental and social awareness will increase** **Regional economic agreements will facilitate travel** **Technology will continue to develop rapidly** **Mobile phones will be used for trip planning** **High-definition televisions and computers will provide virtual visits of a destination** **Innovations in transportation will impact on range, speed, comfort and safety of travel** **Mass tourism will decline as damage is sustained. Impact of natural and man-made disasters on travel behaviour .** **Terrorism will be part of the equation and travellers will adjust** **Security measures will be standardised around the world and their cost will push airfares up** **The liberalisation of air transport and low-cost travel will influence travel demand** **With greater speed and capacity—remote destinations will be more accessible to many travellers and long-haul getaways will become more affordable**

Document Details	Strengths and Opportunities	Challenges, Weaknesses and Threats	Recommendations and Strategies
22. Variety of gardens & horticulture 23. Diversity of active and passive leisure experiences including shopping and sightseeing 24. Increase in average yield of commercial accommodation 25. Strong seasonality—four distinct seasonal experiences 26. Strong investment in the destination 27. Friendly country hospitality 28. Excellent network of accredited visitor information centres (VIC) 29. Natural assets i.e. world heritage rainforest 30. Signature regional events & a number of local events 31. Strengths: antiques & art galleries, heritage & history, nature & the great outdoors, wineries & regional cuisine, community culture, events & festivals, agri-tourism 32. Opportunities: fishing, adventure & sport, bird watching, volunteer & working holidays 33. Australia has strengths in beaches, hinterland, range of festivals & markets, affordable holiday options & established tourism infrastructure 34. Demand for unique experiences 35. Growing recognition & funding for tourism & hospitality training 36. Population growth will	**experiences** **Diversity of active and passive leisure experiences including shopping and sightseeing.** **Increase in average yield of commercial accommodation** **Strong seasonality** **Investment in the destination remains strong** **Friendly country hospitality delivered to the customer across the destination** **Excellent network of accredited visitor information centres throughout the destination** **Significant natural features including a world heritage rainforest and features of national significance** **Signature regional events and a number of significant local events attracting visitors to the destination** **Established experiences:** Antiques and art galleries, heritage and history, nature and the great outdoors, wineries and regional cuisine, community culture, events and festivals, agri-tourism (including horticulture and viticulture). **Emerging experiences: fishing, adventure tourism, bird watching, sports tourism, volunteer and working holidays** **Australia has strengths in beaches, hinterland, range of festivals and markets, affordable holiday options and established tourism infrastructure**	**long travel times. No regular rail or air access to some destinations** **Known as having rich agriculture and produce** **Inconsistency in the quality of service delivery. Once outside the principle tourism areas, service quality deteriorates and the hours and days of operation are reduced. Improved visitor awareness of operating hours needs to be addressed** **The catchment of well trained hospitality staff in Brisbane is currently not being accessed** **Strengths of the Gold and Sunshine Coasts: beach holiday experience with competitive packaging, wide range of accommodation, established tourism infrastructure, dining, shopping and entertainment options and the perception of world class destinations** **Weaknesses of Gold and Sunshine Coasts: access and traffic congestion, safety issues, over development and crowding** **Low mid week occupancy particularly in B&Bs** **Some road access needs further upgraded to suit caravan travellers** **Limited number of packages combining accommodation with local product** **Service quality does not always match customer expectations** **Lack of available information on accommodation occupancy may lead to an oversupply of smaller accommodation**	**Emerging travel markets in developing countries will influence travel demand**

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support improved access & infrastructure 37. Demand for active holidays 38. Demand for 'learning holiday' 39. Inconsistent industry & government funding for promotion/development 40. Ensure marketing is matched by the product in the destination 41. B&B and farm stay issues—lack of research, accreditation & promotion 42. Fluctuating global economies & varying exchange rates 43. More substitutes for travel 44. Increased price sensitivity 45. New destinations are becoming popular i.e. Asia & India 46. Global warming/climate change 47. Tourism will become a regional, rather than a global phenomenon 48. High service expectations 49. Variable fuel prices 50. Increasing market fragmentation, growth in niche markets 51. More frequent short-break holidays 52. Baby boomers retirement 53. Increasing risk of pandemic disease 54. Concerns for safety & security 55. Ageing, affluent, active western population 56. Some regions lack things to	**Increased demand for unique experiences i.e. ecotourism, adventure tourism, antiques/collectables, food and wine, horticulture, fishing, history, heritage and education tourism** **Growing recognition and funding for tourism and hospitality training through various providers** **Rapid population growth in the destination will support improved access and public infrastructure** **Growing interest in active holidays where visitors get involved in activities such as bushwalking, bike riding, canoeing, fruit-picking etc.** **Growing interest in the 'learning holiday' experience e.g. learning about vineyards and winemaking**	**Skilled labour shortage in the hospitality sector which impacts on service quality** **Strong export of local produce so much of the supply goes offshore and is not featured within the destination** **Opening hours do not meet visitor expectations, especially during weekends and evenings** **VICs do not take direct bookings for accommodation or tours, although they are able to facilitate bookings with operators** **There is a need to improve integration of tourism signage with maps and brochures to aid GPS navigation** **Community engagement is occurring but more is needed to continually foster and sustain support for tourism** **Variable range and diversity of product choice and service quality** **Limited marketing and development resources** **Limited understanding of tourism, the tourism business and the destination experience** **Limited competitive package and itinerary options** **Limited growth in length of stay in commercial accommodation** **Large proportion of visitor nights spent in the homes of friends and relatives** **Perceived lack of accredited eco-accommodation**	

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see & do 57. Regions competing with each other 58. Event quality varies, clashing of schedules with other destinations & limited succession planning 59. Lack of acceptance of tourism by some communities 60. Seasonality 61. Low product awareness 62. Need maintenance, signage & improved traffic management 63. Intra-regional transport—limited options. Bus & rail have long travel times. Irregular rail/air access to some destinations 64. Rich agriculture & local produce 65. Inconsistent service quality, poor service outside main tourism areas, reduced hours & days of operation 66. Trained hospitality staff in cities—not being accessed by regions 67. Strengths: beach holidays, range of accommodation, competitive packaging, infrastructure, dining, shopping, entertainment, world class destinations 68. South East QLD has access and traffic congestion, safety issues, over development & crowding. 69. Low mid week occupancy in B&Bs 70. Some road access needs further upgrading to suit		**Need for more four to five star boutique accommodation** **Possible over supply of wineries and cellar doors in Australia could diminish attractiveness** **Over reliance on the flat markets i.e. drive and intrastate** **Visitor safety initiatives—educate tourism operators about responsibilities and international visitors about potential risks and hazards. Address beach, road, bush and outback safety issues** **Consumers becoming more discerning, requiring the destination to focus on quality over quantity** **Increased competition** **Prohibitive costs associated with public liability insurance** **Skills shortage & low uptake of professional development** **Drought—threat to sustainability of water based activities, agri-tourism and horticultural attractions** **Changing nature of the economy—shift from agriculture—decreases the premise for many traditional events e.g. Cotton Festival**	

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caravan travellers 71. Regions have limited number of packages 72. Service quality does not always match customer expectations 73. Lack of information on occupancies may lead to oversupply 74. Skilled labour shortage in the hospitality impacting on service 75. Strong export of local produce—supply goes offshore & not used within destination 76. Opening hours 77. VICs do not take direct bookings 78. Integrate signage with maps & brochures to aid GPS navigation 79. Increase community engagement to foster & sustain support for tourism 80. Variable range & diversity of product & service quality 81. Limited resources 82. Limited understanding of tourism, the tourism business and the destination experience 83. Limited competitive package & itinerary options 84. Limited growth in length of stay in commercial accommodation 85. Large proportion of nights spent in the homes of friends & relatives 86. Lack of accredited eco-accommodation 87. Need for more four to five star boutique			

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accommodation 88. Possible over supply of wineries & cellar doors in Australia 89. Over reliance on flat markets i.e. drive and intrastate 90. Visitor safety initiatives—educate operators & international visitors about potential risks & hazards. Address beach, road, bush & outback safety issues 91. Consumers becoming more discerning—quality over quantity 92. Increased competition 93. Prohibitive costs associated with public liability insurance 94. Skills shortage & low uptake of professional development 95. Drought 96. Changing nature of the economy—shift from agriculture 97. Visitor dispersal & off-season travel 98. Develop sustainable destination experiences i.e. events 99. Encourage innovation & investment through a planned approach 100. Unified approach to the brand 101. Lack of robust destination & regional statistical data to provide indication of tourism economic impact 102. Increased competition from international/domestic destinations			

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103. Strong network of accredited VICs 104. Strong local government/community support for tourism industry 105. Environmental & social awareness 106. regional economic agreements will facilitate travel 107. Technological development 108. Mobile phones—trip planning 109. High-definition televisions & computers will enable 'virtual visits' 110. Innovations in transportation 111. Mass tourism will decline 112. Terrorism 113. Security measures will be standardised around the world & their cost will push airfares up 114. Air transport liberalisation— low-cost travel will influence travel demand 115. Remote and long haul destinations will be more accessible & affordable 116. Emerging travel markets in developing countries			
Tourism Tropical North Queensland 2007 **2007–2008 Business Plan** Annie Riddet, email. Annie.riddet@tnq.org.au Key Issues: 1. Aviation development increasing access—more opportunities	**Aviation development increasing access—more opportunities** i.e. introduction of Jetstar International, growth in Cathay services from Hong Kong, increase in international charter activity, Virgin Blue's order of fourteen Embraer aircraft, Jetstar - introduction of 787s, increased intra-regional activity via Cairns Airport, Qantas extension of Airbus order from twelve to twenty (for delivery in 2010), introduction of Tiger Airways to the market.	**Fluctuating global economies** The strength of the Canadian economy, interest rates rising internationally, Australian GDP growth has slowed, Japanese economy is forecast to grow slowly, New Zealand GDP growth is anticipated to increase, slower growth forecast for the US, European and Asian economies. There are a number of key issues affecting the German economy, the international competitiveness of German firms, supportive global demand	**Revised bilateral agreements** **Potential ownership change of Qantas** **Introduction of long haul LCCs** **Potential for an Australian "open skies" policy** **Consolidation of distribution networks and distribution system**

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2. Develop aviation access strategy with Port Authority to maintain air services & target new opportunities 3. Develop charter services 4. Direct access opportunities 5. Build database of airlines 6. Develop cruise ship capabilities 7. Growth in niche markets 8. Increased use of new media & technology for information & booking 9. Consistent & targeted business tourism strategy 10. Visitor growth from India/China markets 11. Relationship with TQ & TA 12. Federal Action Plans for Japan & Korea 13. Consistent international brand positioning. 14. Play on strengths 15. Strong appeal in international holidays 16. Maximise online presence to gain awareness & conversion 17. Build partnerships with industry, community & government 18. Research that informs marketing activities & provides value to members 19. Integrate tropical holiday experiences into TA's Experience Strategy 20. Grow active membership 21. Implement destination management plan	**Develop aviation access strategy with the Port Authority to maintain existing air services & target new opportunities** **Encourage charter opportunities and service connections** **Direct access opportunities** **Develop a database of airlines** To identify partnership opportunities. **Develop Cruise ship capabilities** Potential growth in the cruise ship market. Identify cruise ship and super yacht opportunities. **Growth in special interest/niche markets** **Increased use of new media and technology for information and booking** **Maintain consistent and targeted domestic and international business tourism strategy** **Growing India/China markets** **Business relationship with TQ and TA** **Federal Action Plans for Japan and Korea** **Tropical North Queensland consistent international brand positioning** **Play on strengths** Experience-rich product. **Strong appeal in international holidays** Position as Australia's second-most visited holiday destination for International visitors.	environment, an underlying improvement in labour market, the increase of VAT and the sluggish nature of structural reforms. A weaker US dollar (against the Australian dollar) is likely to lead to a reduction in expenditure and average length of stay from some segments of this market. **The Australian dollar's strength** Continual growth of Australian economy. The international value of the Australian dollar is an important influence on inbound performance. High Australian dollar is encouraging international outbound travel. High value of the AUD and corresponding price competitiveness. **Aviation issues** i.e. fuel costs, potential environmental levy (emissions tax), limited aircraft, late delivery of A380, rise of low cost carriers (LCCs), limit on domestic capacity, connectivity out of Singapore, outbound LCCs increasing competition, increase in passenger taxes at Australian ports, declining direct international seat capacity into Cairns, international visitors to Cairns connecting with the destination via other Australian gateways, placing extra pressure on domestic seat capacity, impact of increased airport security, growth in security measures **LCC introduction providing new choices of outbound and domestic destinations** **Limited direct access and higher costs associated with directly reaching TNQ** **Shrinking Japanese outbound market**	**Research to identify potential markets and the best way to successfully attract those markets** **New product development opportunities** **Business tourism** **Provide industry leadership** Active involvement in organisations and forums both in Australia and overseas. **RTO acts as a regional economic development agency** Through its tourism marketing and development activities it stimulates economic growth and employment opportunities. **Government elections** Potential disruption through the Federal election. local Government elections and possible local council amalgamations. **Micro nature of the business community throughout the region** **Consolidation of accommodation and some attraction product** **Industry standards and capabilities** **Alcohol management plans** **Length of stay versus turnover** **Sustainable tourism growth** An underlying philosophy is that growth must be sustainable and not threaten the fragile rainforest or reef environment.
22. Maximise outcomes from the Queensland Tourism &	**Maximise our online presence to drive awareness and gain conversion**	**Dependence on low growth markets** Low growth from Germany and the UK.	**Good government policies** Ensure government policies consider, and

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Aviation Strategies 23. Influence & inform government tourism policy 24. Build relationships with sub-regions & improve dispersal 25. Maintain a motivated & prepared workforce 26. Encourage the right tourism development 27. Support sustainable management 28. Build relationships with research providers & partners 29. Refresh of eco tourism 30. Promotion of Indigenous tourism 31. Develop infrastructure 32. Strong VIC network 33. Brand integration 34. Regional tourism studies 35. Well prepared & performing industry 36. Fluctuating global economies 37. Australian dollar's strength 38. Aviation issues i.e. fuel costs, emissions tax, limited aircraft/access, rise of LLCs, poor connections, increase security 39. LCC introduction—more competition for outbound & domestic tourism 40. Limited direct access & higher travel costs 41. Shrinking Japanese outbound market 42. Dependence on low growth markets 43. Inconsistency of Brand Australia & weak national	**Build lasting and productive partnerships with industry, community and government** **Achieve research outcomes which inform our marketing activities and provide value to our members** **Integrate our tropical holiday experiences into Tourism Australia's experience strategy** **Grow an active membership base** **Guide and manage the implementation of the destination management plan** **Maximise TNQ's outcomes from the Queensland Tourism and Aviation Strategies** **Positively influence and inform Government policy that may impact on the tourism business environment** **Build effective relationships with all sub-regions and improve dispersal** **Maintain a motivated and prepared workforce** **Encourage the right tourism development** Encourage tourism development consistent with actual needs. **Support sustainable management** **Building relationships with research providers and partners** To identify opportunities to work collaboratively.	**Inconsistency of Brand Australia and weak national tourism marketing campaigns** **Increased competition from cheaper tropical destinations** **Growing number of new markets and limited resources to work effectively in all of them** **Growing environmental sensitivities connected with long haul flights** **Insufficient, inconsistent market intelligence** **Absence of TNQ in-market representation outside of Europe** **Perception of declining fashionability of the destination** **Threat of increased interest rates** **Unstable petrol prices for drive tourism market** **Competition for discretionary income** **Australians taking less leave and shorter breaks** **Seasonal capacity constraints due to international passengers taking up most seats** **Domestic seasonality in sub-regions** **Increase in business tourism competition** **Marketing confusion in federal and state roles**	not threaten, the sustainability of the tourism industry through ill considered changes or restrictions. **Increase awareness of extensive range of experiences available** **Provide funding bodies with evidence of return on their investment** **Ensure maximum funding is achieved** Taking into account the cap that currently applies to our state funding and exploring federal funding opportunities. Achieve an increase in leveraging of funding. **Grow holiday/leisure visitor numbers, visitor nights & expenditure** **Maintain and grow our tropical brand awareness** **Build on education tourism capabilities** **Partnerships with major community groups**

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tourism marketing 44. Increased competition from cheaper tropical destinations 45. Growth in new markets—lack resources to develop 46. Environmental sensitivities due to long haul flights 47. Insufficient, inconsistent market intelligence 48. Lack of in-market representation 49. Perception of declining fashionability of destination 50. Threat of increased interest rates 51. Unstable petrol prices for drive tourism market 52. Competition for discretionary income 53. Australians taking less leave & shorter breaks 54. Seasonal air capacity constraints due to international demand 55. Domestic seasonality in sub-regions 56. Increase in business tourism competition 57. Marketing confusion in Federal & State roles 58. Seen as mono-experience 59. Continuing lack of awareness of sub-regions 60. national trend of flat domestic market 61. Competition from maturing destinations within Queensland 62. Impact of droughts, fires & other natural disasters 63. Ageing population 64. Growth in self-funded retirees seeking quality experiences	**Refresh of eco tourism** **Promotion ofIndigenous tourism** **Develop infrastructure** To meet projected needs. **VIC network** **Brand integration** **Regional tourism studies** **Well prepared and performing industry**	**Perception of mono-experience (GBR and rainforest)** **Continuing lack of awareness of sub-regions** **National trend of flat domestic market** **Competition from maturing destinations within Queensland** **Impact of droughts, fires and other natural disasters** **Ageing population** **Growing number of self-funded retirees who are seeking quality experiences** **Customer service strategy** **Skills and labour force shortage** **Global warming impact on the GBR and rainforest and related negative publicity** **Safety issues and the management of associated negative publicity** **Seasonality** **Lack of product mix, particularly in accommodation sector** **Lack of dispersal to sub-regions** **Inconsistent presentation of regional product** **Difficulties with access to sites in sensitive protected areas**	

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65. Customer service strategy 66. Skills & labour shortages 67. Global warming impacting on GBR & rainforest & related negative publicity 68. Safety issues & negative publicity 69. Seasonality 70. Lack of product mix 71. Poor dispersal to sub-regions 72. Inconsistent presentation of regional product 73. Difficulties with access to protected areas 74. Inconsistent development approval process 75. Lack of security of land tenure on Indigenous lands 76. Regulations 77. Lack of coordination of government programmes 78. Lack of major events 79. Externalities 80. Council & eco tourism 81. Inconsistent Australian brand & weak national tourism marketing 82. Revised bilateral agreements 83. Potential ownership change of Qantas 84. Introduction of LCCs 85. Potential for an Australian 'open skies' policy 86. Consolidating distribution network/system 87. Research new markets & how to attract them 88. New product development opportunities 89. Business tourism 90. Provide industry leadership		**Inconsistencies with all council jurisdictions in the development approvals process** **Lack of security of land tenure on indigenous lands** **Regulations i.e. business taxes, charges, and licences** **Lack of coordination of government programmes for the region** **Lack of significant draw-card events to attract visitors** **Externalities i.e. global warming, pandemics, wars and terrorism, oil supply crises, bio fuels development, variable world economies, natural disasters** **Council (QTIC) and eco tourism** **Inconsistency of Brand Australia and weak national tourism marketing campaigns**	

Document Details	Strengths and Opportunities	Challenges, Weaknesses and Threats	Recommendations and Strategies
91. RTO act as regional economic development agency 92. Government elections 93. SME nature of industry 94. Consolidation of accommodation & some attraction product 95. Industry standards & capabilities 96. Alcohol management plan 97. Length of stay vs. turnover 98. Sustainable tourism growth 99. Need good Government policies 100. Increase awareness of diversity of experiences 101. Provide funding bodies with evidence of return on their investment. 102. Ensure maximum funding is achieved 103. Grow holiday/leisure visitor numbers, visitor nights & expenditure 104. Maintain & grow tropical brand awareness 105. Build on education tourism capabilities 106. Partnerships with major community groups			

South Australia

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Riverland Strategic Tourism Plan Steering Committee 2005 **Riverland Integrated Strategic Tourism Strategy** Key Issues: 1. Strengths in its core themes of river, nature-based, sense of place & food & wine 2. Strengthen its sense of differentiation 3. Enhance & grow authentic experiences 4. Align regional policy & infrastructure 5. Productively market region 6. Strengthen tourism capacity 7. Develop nature based & ecotourism 8. Increase visitor spend 9. Encourage accommodation that is an experience in its own right 10. Develop walking/cycling trails 11. 'Baby boomers' market 12. Enhance "on the river" experiences 13. Provide/promote local produce 14. Major horticultural region 15. Highest proportion of people visiting wineries compared to six other Murray River destinations 16. Develop healthy lifestyle experiences 17. Share the regions story 18. Lack of time 19. Tourism Affordability 20. 21. Adventure sports considered	**Strengths in its core themes of river, nature-based, sense of place and food and wine** **Strengthen its sense of differentiation** Through complementary themes within the plan including healthy lifestyle, sports tourism, special interests, festivals and events; and history and heritage. **Enhance and grow authentic experiences** Develop environmentally responsible, iconic and innovative nature-based experiences. Improve visitor connection with the river, enhance 'on the river' experiences, integrate experiences with local product, develop healthy lifestyle experiences, tell regions story. **Align regional policy and infrastructure** Provide infrastructure that welcomes, supports and guides the flow of visitors, improve access while ensuring ecological integrity, align planning and other policy to facilitate investment in sustainable tourism. **Productively market the region** Strengthen awareness of 'on river' and drive experiences, enhance the marketing of events and festivals, develop new markets (especially international). **Strengthen tourism capacity** build professional and competitive tourism industry, effectively manage risks to the brand, build a positive tourism culture within the community. **Develop nature based and ecotourism** Research has shown the unrealised opportunities to create nature-based and ecotourism experiences around the diverse	**Lack of time** The Australian working population has eighty eight million days of holiday leave accrued. **Tourism affordability** Other consumer priorities and the industry's lack of competitiveness are major issues confronting all destinations. **Adventure sports are considered high risk by insurance sector** Canoeing and water-skiing are considered by the insurance sector as being higher risk activities, and thus have the greatest propensity to be impacted by public liability insurance issues. **Industrial relations policies** The Commonwealth Government's new Industrial Relations Policies may have further impact on the 'leave pool' if employees are granted the right to cash in leave entitlements. **Challenge to establish a strong destination brand** Need to understand where the current brand image sits (to the extent that there is one) we must understand what the consumer is thinking. **Price of petrol continues to rise** The rising price of petrol, which if it continues, will suppress demand in the up till now strong touring market (this touring market was strong post September 11, Bali and SARS as Australian's travelled at home more. However, this trend has started to reverse since around December 2003) and there may be a substitution between touring and single destination holidays. May see a	**Become a destination of choice** Set a goal of becoming a destination of choice for at least one productive and 'low risk' segment of the market (i.e. the Adelaide 'escape' market). **Collaborative marketing** Foster a strong and collaborative commitment to a clearly articulated brand position. **Build on core strength—the river** Provide access to and memorable experiences of the river. Demonstrate and communicate in practical terms the community's stewardship of the River and its environment. **Build 'iconic products'—strengths** Give priority to establishing several fresh 'iconic products' based on destination strengths. Not necessarily big but renowned for authenticity, creativity and sustainability such as Banrock Station. **Put in place support infrastructure to facilitate the regional experience** **Align planning policy with vision to encourage development consistent with the regions' brand values** **Build tourism industry capacity** **Strengthen the awareness of on-river and drive experiences** **Develop a more focussed and coordinated approach to print and web information to highlight regions competitive strengths** **Provide training for tourism operators,**

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high risk by insurance sector 22. Industrial Relations Policies 23. Challenge to establish a strong destination brand 24. Rising price of petrol 25. Higher levels of personal & household debt 26. Changing household consumption patterns 27. Increased costs of travel 28. More Australians travelling outbound 29. Changes to labour market making travel more difficult 30. Growth in low cost carriers 31. Strong trends in interstate migration 32. national accommodation supply 33. Potential environmental threats 34. Potential negative perceptions of the Murray 35. Become a destination of choice 36. Collaborative marketing 37. Build on core strength 38. Build 'iconic products' 39. Put in place support infrastructure to facilitate the regional experience 40. Align planning policy with vision to encourage development consistent with regions' brand values 41. Build tourism industry capacity 42. Strengthen awareness of on-river/drive experiences 43. Develop a focussed & coordinated approach to print & web information to	and accessible natural assets of the region. **Aim to increase visitor expenditure** **Encourage accommodation that is an experience in its own right** Retreat/eco-lodge, 'safari' tents, camping facilities, eco-huts and bird hides. **Develop walking/cycling trails** Designated trails to facilitate both short walks to particular sites and sustained overnight walking trips. Located around natural attractions and to connect different towns and tourism opportunities e.g. reserves/recreational areas, cellar doors. **The 'baby boomers' market** The growing opportunities in the retiring 'baby boomers' market and demand for relaxed soft adventure and special interest themes, is also an imperative for the Riverland to develop compelling experiences that will set it apart from other destinations. **Enhance "on the river" experiences** The Riverland must continue to provide a broad range of water-based opportunities to encourage those attracted by the allure of water. The Riverland must reinforce and convey the healthy lifestyle and wellbeing messages that can be provided by its house-boating experiences and by establishing the Riverland as South Australia's 'must do' canoe destination. **Provide and promote opportunities for visitors to discover and celebrate the abundance of local produce** **Major horticultural region** **Has the highest proportion of people visiting wineries in comparison to six other Murray River destinations**	sustained decline of the touring holiday in favour of the single destination holiday. This will provide a distinct opportunity for the Riverland but will increase further the importance of the Adelaide/South Australian market. **Higher levels of personal and household debt** Especially Sydney and Melbourne the main sources of domestic travel. **Changing household consumption patterns** Increases in spending on communications, household goods, home entertainment systems, furnishing, renovations and health. **Increased costs of domestic travel** Excludes airfares. Reduces affordability and competitiveness (including the impact of GST). **Australians travelling outbound more** Particularly Sydney and Melbourne. For example, better exchange rate and increase in seat capacity and holiday deals to NZ and South East Asia. **Changes in the labour market making travel more difficult** Increasing casualisation of the workforce, long working hours and people not taking their holiday leave. **The growth in low cost air carriers** i.e. Virgin Blue and Jetstar, offering city to city travel at more affordable prices (increasing seating capacity between capital cities and major tourism regions). **Strong trends in interstate migration** 400,000 people moved states in 2003. Favouring domestic travel for VFR purposes	**accommodation providers and volunteers to strengthen skills in interpretation and storytelling** **Improve staff and volunteers understanding of the Riverland brand and mix of regional tourism products** **Access grant funding that can support growth of tourism within the region** **The need for collaboration and role clarification** **Environmental sustainability through sound development and interpretation** **Focus on development that will strengthen the brand promise** **Strengthen existing markets and creating new markets** **Focus on the core asset—the river** **Position and brand the region**

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highlight strengths 44. Provide training for tourism operators, accommodation providers & volunteers 45. Improve staff & volunteers understanding of brand & regional tourism products 46. Access grant funding to support growth of tourism 47. Need collaboration & role clarification 48. Environmental sustainability through sound development & interpretation 49. Focus on development that will strengthen the brand promise 50. Strengthen existing & create new markets 51. Focus on the core asset 52. Position & brand the region	Region must strengthen the association of a healthy lifestyle with food and wine experiences by continuing to support opportunities to access and value-add to the region's food and wine experiences. **Develop healthy lifestyle experiences** Provide range of recreational pursuits and health and well-being opportunities. Emphasis on healthy lifestyles is being embraced world-wide. People are increasingly looking for alternative ways for 'staying healthy' in mind, body and soul. Recreational pursuits offer opportunities for exercise/exploring. **Share the regions story** In an entertaining and interactive manner. Encourage informal, entertaining and idiosyncratic ways to tell the Riverland story from river morphology, through pioneering settlement to environmental rehabilitation, weaving within this the Riverland's Aboriginal and 20th century culture. Caravan parks, houseboats, fruit fly stations, town riverfronts, rest areas, scenic lookouts and national parks are key places where the visitors that the Riverland seeks to target will gather, meet, and stop.	**National accommodation supply—growth in four star accommodation** Strongest growth has occurred in four star accommodation (thirty one percent since June 2001) with guest nights up fifty percent. Regions that aren't competitive in this regard are likely to suffer. **Potential environmental threats** These include fragmentation and isolation of habitat, loss of remnant vegetation, inappropriate grazing, environmental weeds, problem introduced animals, inappropriate fire regimes, salinity, water pollution, mismanagement of water resources, groundwater extraction, mining, uncontrolled camping, off road driving, soil erosion and compaction, species extinction. **Potential negative perceptions of the Murray in terms of management and health of water resources** (e.g. water flows, salinity, pollution etc). If the Riverland is positioning itself as a place for healthy rejuvenating escapes, then negative media publicity can substantially negate any marketing messages and hence appeal of the region. It is important to 'live' the following brand values as far as is practicable.	
Alexandrina Council, District Council of Yankalilla, City of Onkaparinga, City of Victor Harbor and South Australian Tourism Commission 2007 **Fleurieu Peninsula Region Integrated Strategic Tourism Plan 2007–2012** www.tourism.sa.gov.au Key issues: 1. Can offer all four SA core	**Can offer all four SA core experiences** Wine & food; nature & eco-tourism; coast & marine environments; festivals & events **Accessible to major population—Adelaide** **Positioning, branding, differentiation and target marketing** Target those seeking relaxation, indulgence, quality food, wine and art, outdoor activities, coastal and water based holidays. Reflect the	**Develop transport between destinations and attractions** Transport between destinations and attractions are an issue across the region. **Infrastructure gaps or issues in regional areas** **Directional and informational signage is of poor quality and consistency. Restrictions on signage resulting in homemade *ad hoc* signage in locations that creates safety problems. Attractions need to be signed.**	**Establish a tourism planning and development committee** **Develop marketing plans and adequately resource its response to priorities** **Develop a brand policy to guide the region's marketing** **Prepare a strategy for the future provision of visitor information**

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experiences 2. Accessible to major population base 3. Positioning, branding, differentiation & target marketing 4. Increase yield rather than visitor numbers 5. Product development 6. Conserve ecological assets & manage access 7. Develop partnerships to build tourism infrastructure 8. Build a strong tourism workforce 9. Continue to enhance customer service & quality of experiences 10. Resource, implement, monitor and evaluate strategies & actions 11. Value add 12. Encourage innovation & competitiveness 13. Build capacity & capability 14. Strengthen Indigenous tourism 15. Develop product to support walking & cycling 16. Develop adventure opportunities 17. History & heritage 18. Develop a single marine environment centre 19. Develop accommodation—for luxury ecotourism market & budget outdoor adventure tourists 20. Develop transport between destinations & attractions 21. regional infrastructure	quality of regional produce, food and wine and the 'good life'. Target families, activity seekers, infrequent travellers and those seeking to relax and indulge in great food, wine and art in special settings. **Increase yield rather than visitor numbers** Achieve growth in tourism expenditure. Restructure the composition of markets to attract higher yield visitors. **Product development** Encourage/facilitate the development and reinvigoration of products to meet the needs of target/existing markets. **Conserve ecological assets and manage access** Manage tourism access to and use of natural landscapes, marine areas and inland waterway. **Develop partnerships to build tourism infrastructure** **Build a strong and resilient tourism and hospitality workforce** **Continue to enhance the standard of customer service and quality of visitor experiences.** **Provide resources & commitment to strategies and actions. Monitor and regularly evaluate these** **Value add** **Encourage innovation and competitiveness** **Build capacity and capability** **Strengthen Indigenous tourism product** **Develop product to support walking and**	**Signage should badge and unify the region** **Car parking availability and traffic management issues for larger regions** **Region not associated with sophistication/indulgence** **Environmental damage** Loss of native vegetation and biodiversity habitat, erosion and spread of weeds, loss of connections between freshwater and marine environments, pollution of watercourses and marine habitats, interference to behaviour of fauna, birds and aquatic species, predation by introduced species, especially feral cats, increased risk of wildfire to native flora and fauna, increased habitat fragmentation, increased impacts on coastal areas such as sand dunes, cliffs and beaches. **Climate change** Significant and real challenge for its implementation will be the issue of available funding and resources to support recommended actions. **Impacts of township expansion and concentrated rural living developments** **Bad development—non-complying, poor design** Non-complying forms of development, poor design, capacity of planners and development assessment panels to interpret design based policies, need for planning policy change, mechanisms for changing planning policies.	**Initiate changes to planning legislation, policy and create guidelines to facilitate appropriate sustainable tourism development** To facilitate tourism development that meets the aspirations of visitors, reflects community values and achieves conservation outcomes. **Product planning and development—particularly nature based** **Liaise with training and vocational education providers to ensure appropriate tourism training** **Develop packaging and marketing collateral** **Increasing the economic contribution of tourism** **Developing or reinvigorating products that meet the needs of target areas** **Conserving and enhancing the region's ecological assets** **A governance and funding model to enable resources to be committed to implementing, monitoring and evaluating the plan**

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gaps/issues 22. Directional & informational signage is of poor quality & consistency. Restrictions resulting in homemade ad hoc signage in locations that create safety problems. Attractions need to be signed. Signage should badge & unify the region 23. Larger regions—issues with car parking & traffic management 24. Region not associated with sophistication/indulgence 25. Environmental damage 26. Climate change 27. Impacts of township expansion & concentrated rural living developments 28. Bad development—non-complying, poor design 29. Establish a tourism planning & development committee 30. Develop & resource marketing plans 31. Develop a brand policy 32. Prepare a strategy for the future provision of visitor information 33. Make changes to planning legislation, policy & practices—create guidelines to facilitate sustainable tourism development 34. Product planning & development—particularly nature based 35. Liaise with training & vocational education providers to ensure appropriate tourism training 36. Develop packaging & marketing collateral	**cycling** **Develop adventure opportunities** **Tell the stories of the past—history and heritage** **Develop a single marine environment centre in Victor Harbor** **Develop accommodation that caters to luxury ecotourism market and more budget outdoor adventure tourists**		

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37. Increase the economic contribution of tourism 38. Develop/reinvigorate products that meet the needs of target areas 39. Conserve & enhance ecological assets 40. Develop governance/funding model— enable resources to be gained to implement, monitor & evaluate the plan			
Tourism Barossa, South Australian Tourism Commission, Barossa Wine & Tourism Association 2007 **Tourism Marketing Plan 2007–2008** http://www.barossa.com/webdata/resources/files/Tourism_Barossa_Marketing_Plan_07-08.pdf Key Issues: 1. Brand Barossa is an asset for tourism/wine industry & wider business sector 2. Other regions strengths 3. Wine 4. High awareness 5. Diversity of activities 6. Scenic beauty 7. Accessible heritage 8. Accessibility—proximity to Adelaide 9. Diverse accommodation 10. Authentic food & wine 11. Landmark festivals & events 12. Generate tourism activity by drawing visitors & boosting yield & raising profile of the region 13. Compact diversity	**Brand Barossa is an asset for tourism/ wine industry & wider business sector** The strength of the brand has helped shape investment, marketing and product development, and the protection and further development of the brand is a focus of Barossa Wine & Tourism. Name recognition and quality association; the name is larger than the region itself; identifiable brands, icon & people SATC / Brilliant Blend **Other regions strengths - close to nature/coast/population centre, strong in arts, nature based/eco-tourism, surfing, high profile wine region, MICE market and infrastructure. Priority area for STO. Oldest wine producing region, over 120 cellar doors, proximity to international gateway, diversity of facilities/services/accommodation/ experiences, cooking and wine schools. Closest wine region to population centre, cycle tourism, strong agricultural industry, innovative and fresh local food/produce, distinctive towns, heritage portrayed heavily, Riesling trail, old railway passage, close to CBD, towns geographically close, numerous markets, strong German heritage** **Wine**	**Strong competition from other regions** **Weak domestic tourism** **Changing household consumption** Increased spending on communications, household goods, renovations, home entertainment, health and lifestyle. **High levels of household debt** **Increased costs of domestic travel-reduced affordability** **Outbound travel by Australians** Improved exchange rates and an increase in seat capacity and holiday deals to NZ and SE Asia have made overseas travel more affordable. **Changes in the labour market** i.e. casualisation of workforce, long working hours, accumulated leave. **Growth in low cost carriers** Increase in capacity of 'city hopping' airfares = propensity for short city breaks rather than touring holidays to regions. **Rising price of petrol** Potential to suppress the touring market	**Improve decision-making through relevant research** **Collect, collate and disseminate tourism information** Particularly to sub-regions and businesses to increase understanding of markets, consumer behaviour and effectiveness of marketing activity and consumer and visitation trends. **Research focus group** Facilitate a focus group with representatives from each sector of the industry to identify and share key statistics and trends (numbers, overseas markets, industry issues). **Produce and distribute a Barossa Tourism Monitor—report and analyse data** **Cooperative marketing** Work with Wine Barossa and Food Barossa on tourism marketing campaign to promote wine & food tourism. **Identify/provide training for RTO staff** Identify development needs and opportunities for regional Marketing Manager, Marketing & Administration Coordinator and Tourism Barossa Committee Members

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
14. Synergy between Wine & Tourism 15. Rich in history & culture 16. Old wine heritage 17. Wide interest in wine tourism from visitors 18. High profile of the name 'Barossa' 19. International recognition & reputation of wine labels 20. Increased stay & yield 21. Greater use of industry distribution channels 22. VFR Market 23. Linkages with neighbouring regions 24. Diversity of product in addition to wine 25. Cooperative marketing 26. Increasing industry & cooperative investment 27. Building relationships with local government 28. Strong competition from other regions 29. Weak domestic tourism 30. Changing household consumption 31. High household debt 32. Increased cost of domestic travel, reduced affordability 33. Outbound travel by Australians 34. Changes in labour market i.e. casualisation, long working hours, leave being accumulated 35. Growth in low cost carriers 36. Rising price of petrol 37. Growth in four star accommodation 38. Lack product development 39. Trading hours 40. Oversupply of self-	World reputation for wine, particularly Barossa Shiraz & Eden Valley Riesling. Home base to significant wine brands. Major draw card for visitors; accessible cellar door experiences within close proximity. **High Awareness** The Barossa is well known throughout Australia and many overseas markets as a tourism destination. **Diversity of activities** Offer more than just wine, making the destination more attractive to those interested in things additional to/other than wine **Scenic beauty** Amenity is part of the attraction of the Barossa and adds to the lifestyle and well-being attributes of the region **Accessible heritage** People can touch, feel and experience original buildings, sites and vineyards. **Accessibility—proximity to Adelaide** Close and convenient to Adelaide and airport, as well as neighbouring regions for day trips by car or coach. Ideal for VFR market. **Diversity of accommodation** Can cater to leisure and business markets, for groups and individuals. **Authentic Food and wine culture** Home grown, homemade. regional food branding with Food Barossa. **Landmark Festivals and Events** A healthy regional calendar with diversity in types of events. Significant world-stage events (Shiraz Alliance, Tour Down Under)	**Growth in four star accommodation** nationally, the strongest growth in accommodation supply has been in the four star category. Regions not competitive in this category are likely to suffer. **Lack of product development** Limited product with pricing structures for international markets. **Trading hours across all sectors** Particularly in dining sector (meals after 8). **Oversupply of self-contained B&Bs and lack of upgrading** Many not having upgraded facilities to meet market demand. Casualisation of some operations to the detriment of those who run B&B as their main source of income. **Need for budget family and backpacker accommodation** Need to upgrade group accommodation facilities to meet market demand. **Signage & roads need upgrading** Gateway, directional and tourist signposting is poor and needs upgrading. Some road conditions poor for touring. **Public transport/access** Limited public transport to and within region—currently one provider with a basic service and poor hours of operation. **Limited self-drive car hire facilities** **Weaknesses of other regions** Too many wine operators, lack of heritage and culture, non-traditional foods, large geographical area, segregated industries, part of metro city, poor positioning, challenge to convert to overnight stays.	**Reduce fragmented approach** Enable a more coordinated way of marketing the region with one consistent message **Leverage STO key interstate marketing campaigns that promote food, wine and festivals** **Converting day trippers/encouraging longer stays via increased packaging & wholesale presence** **Regular communication with international managers in key international markets** Such as New Zealand, the Americas and UK. Needs to occur throughout the year to determine cooperative marketing and media and trade famil opportunities. This includes hosting of international media in conjunction with SATC/Tourism Australia's VJP to stimulate positive editorial coverage (all year). **Identify key tourism products that can be developed** Mentor them to identify and grow their international marketing profile and placement. **Sustainable development and preservation of regions heritage**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
contained B&Bs, lack of upgrading & casualisation 41. Need backpacker & family budget accommodation 42. Upgrade signage & roads 43. Public transport/access 44. Limited car hire facilities 45. Weakness of other regions— many wine operators, lack of heritage/culture, non-traditional food, large geographical area, part of city, segregated industries, poor positioning, hard to convert to overnight stays. 46. Poor signage 47. Lack of packaged product 48. Market development in Victoria, NSW, & South East QLD 49. Low understanding of tourism industry structure—businesses & destination marketing	**Generate tourism activity by drawing visitors and boosting yield, and raising profile of the region** **Compact Diversity** Lots to see and do within close proximity in addition to the wine experience. **Synergy between wine & tourism** Combined synergy and coordinated approach to marketing of wine, tourism and events and ensuring visitors can access information/cross marketing opportunities. **A living and rich history and culture** **Over 150 years of viticulture & winemaking—old vine heritage** **Wide interest in wine tourism from visitors** **High profile of the name 'Barossa'** **International recognition and reputation of wine labels** Can help build awareness/build business/add value to tourism promotions in international markets	**Poor signage** Lack of consistency/strategic placement significantly affecting visitors/businesses. **Lack of packaged product** **Market development in Victoria, NSW, and South East QLD** **Low understanding of tourism industry structure i.e. for businesses and destination marketing** **Parochialism/complacency/lack of understanding of benefit of tourism, slow industry development and growth, particularly in areas of packaging, retailing and international marketing** Community attitudes—lack understanding of tourism benefits. Risks sending consistent message of the brand; may inhibit future growth and development; missed opportunities. Industry complacency—lack understanding (particularly SME's) about the need to continually market the region. **Pressure on funds and resources**	
50. Parochial/complacent/poor understanding tourism benefits/slow tourism development & growth (particularly in packaging, retailing & international marketing) 51. Lack of funds & resources 52. Unable to respond to all opportunities; significant time in administration, seeking funds & resources rather than pure marketing 53. Hospitality/service standards/professionalism	**Increased length of stay and yield** **Greater use of industry distribution channels** E-marketing and website upgrades. Increase ability to capture visitor information to aid direct marketing. Real time information and bookings, increased competitiveness. **Visiting friends and relatives market** A huge market opportunity to grow visitation; increase community support and awareness of tourism and the assets in the region; increased spending.	**Unable to respond to all opportunities; significant time put into administration, seeking funds and resources rather than pure marketing** **Hospitality and service standards & professionalism** Lacking in some areas affecting visitor expectations and experience. **Lack of recognition as a destination to stay one night or more** Affects ability to build overnight stays and increase yield. Limited night time activities Reduces appeal for visitors staying over	

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
54. Drive through destination 55. Shopping hours not "visitor friendly" 56. Phylloxera Vine Disease 57. Popularity of other growing wine tourism destinations 58. Changes to boundaries & developments 59. Funding 60. Reliant on STO funding 61. Terrorism & disease 62. Industry/economic trends 63. Improve decision-making through relevant research 64. Collect, collate & disseminate tourism information 65. Research focus group 66. Produce & distribute Barossa Tourism Monitor—report & analyse data 67. Cooperative marketing 68. Identify/provide training for RTO staff 69. Reduce fragmented approach 70. Leverage STO marketing campaigns that promote food/wine/festivals 71. Converting day-trippers, encourage longer stays, increase packaging & wholesale presence 72. Communicate with International Managers in key markets 73. Identify tourism products that can be developed 74. Sustainable development/ preservation of heritage	**Linkages with neighbouring regions** Encouraging people to stay in the region/state longer; opportunity for collaboration between operators; development of a wine tourism route for the state. **Diversity of product in addition to wine** Opportunity to promote a significant dimension of the region's experiences in addition to wineries. **Cooperative marketing** Coordinated approach from within the region will improve cohesiveness of industry and community. Seek cooperative and regional advertising opportunities with trade and consumer media channels. Investigate opportunities for the Barossa to be promoted cooperatively with Tourism Barossa, Wine Barossa and Food Barossa at the 2007 Royal Adelaide Show. Identify trade publications that offer cooperative marketing opportunities to increase awareness of Barossa as business events destination. **Increasing industry investment and cooperative investment** Increases marketing budget and marketing activity. **Building relationships with local government stakeholders**	**Shopping hours not 'visitor friendly'** Some open late in day, not open 7 days, close early or don't stick to advertised hours. Reduces appeal for visitors staying over, leaves visitors at a loose end. **Phylloxera vine disease** Would damage major asset in wine. **Popularity of other growing wine tourism destinations** Can lose share of market to regions who offering similar experiences. Increased need to work cooperatively within region. **Changes to boundaries and developments** Potential weakening of name and product; trying to mean too many things to too many people. Protect brand. **Funding** Other wine tourism destinations investing more resources in marketing resulting in higher profile for them. State government funding for tourism decreasing. **Heavily reliant on SATC funding** Need to improve contribution from other stakeholders by building relationships and increasing industry commitment through membership and cooperative marketing. **Terrorism and disease** Impact on international travel. **Industry and economic trends** Discretionary income changes affecting consumer spending patterns—increase in fuel prices, interest rates, home renovations, major home appliance purchases etc. Accumulated leave, Australian domestic visitors have reduced their amount of time spent on holidays.	

Western Australia

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Tourism Western Australia 2007 Australia's Gold Outback: Destination Development Strategy 2007–2017 http://www.tourism.wa.gov.au/Publications%20Library/Polices%20Plans%20and%20Strategies/Destination%20Development%20Strategies/DDS%20Australias%20Golden%20Outback%202004-2014.pdf Key issues: 1. International visitors see distance as 'authentic' 2. Accessible from the east 3. A range of good standard & reasonably priced accommodation 4. Develop attractions & activities 5. Promote driving as an 'activity in itself' rather than a means to an end 6. Camping under the stars 7. Four wheel driving 8. Golden Quest Discovery Trail 9. Develop & grow Indigenous tourism 10. Develop & grow mining and gold rush products 11. Directional & interpretative signage 12. Develop & link major attractions/icons, touring routes & trails 13. Disperse visitors 14. Provide leadership for development 15. Strengths 16. Areas for development	**International travellers think distance adds to the authenticity of the outback experience** **Easily accessible from the East due to highways** **A range of good standard and reasonably priced accommodation** **Develop attractions and activities** **Promote driving as an 'activity in itself' rather than a means to an end** **Camping under the stars** **Four wheel driving** **Golden Quest Discovery Trail** **Develop and grow Indigenous tourism products** **Develop and grow mining and gold rush products** **Directional and interpretative signage** To interpret and explain the artist's vision and to improve access routes and visitation. **Develop and link major attractions/icons, touring routes and trails** **Disperse visitors** **Provide leadership for development** **Strengths: history/mining experiences, beach/coastline, wildflowers and outback experiences.** **Areas for development: family country**	**Need to increase passenger air access on regular transport services** **Distance is a deterrent to the domestic market—need adequate and cost effective access i.e. sealed roads, airports, railway lines, harbours and transport services like buses, tours, hire cars, etc.** **Product and infrastructure gaps tend to surround specific destinations** **The lack of activities & attractions** **Uniform high standard of service can be difficult to maintain** **Transient nature of some of the hospitality workforce** **regional areas lack basic infrastructure and amenities** Large number of small country towns with limited number of tourists. Some parts of the region lag behind in the provision of basic amenities i.e. shops, restaurants and cafes, public toilets, public transport, tourist information, rest areas and picnic grounds. **Lack of access to some iconic attractions** Some remarkable locations are not accessible by two-wheel drive vehicles, which limits their tourism development potential. **Economy heavily based on mining and manufacturing—need to increase tourism investment to diversify economy** **Fluctuating commodity prices and exchange rates** **Issues with accessing meals and**	**Identify and prioritise icons and iconic experiences** **Develop strategies to address gaps in infrastructure, attractions, accommodation & other tourism facilities** **Cooperative marketing and branding—coordinated approach for promoting Outback tourism that extends across the state borders of Queensland, NSW, SA and WA**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
17. Iconic development 18. Increase three to four star accommodation 19. Increase passenger air access on regular transport services 20. Distance 21. Product & infrastructure gaps tend to surround specific destinations 22. The lack of activities & attractions 23. Uniform high standard of service 24. Transient nature of the workforce 25. regional areas lack basic infrastructure & amenities 26. Lack of access to some iconic attractions 27. Economy heavily based on mining & manufacturing diversify into tourism 28. Fluctuating commodity prices & exchange rates 29. Issues with accessing meals & merchandising 30. Identify & prioritise icons & iconic experiences 31. Address gaps in infrastructure, attractions, accommodation & other tourism facilities 32. Cooperative marketing & branding	**farm stays,** **uncrowded getaways for water activities (Esperance)** **Iconic development** **Improve or increase three to four star accommodation**	**merchandising**	
Augusta Margaret River Tourism Association 2008 **Strategic Marketing Plan** Jasmine Meagher, email. jasmine@margaretriver.com Key Issues: 1. Margaret River is a well known & developed	**Margaret River is a well known and developed destination in WA** **Strong brand with perceived quality and desirable destination** **Willingness/propensity of STO to promote region as a key destination** This is open to politically and regionally	**Parochial issues effecting cooperative marketing with the neighbouring RTO** Including member advertisements, the publications cost neutral nature and the major promotional document of the RTO. **Perceived as overpriced and too busy** Particularly in peak times.	

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
destination in WA 2. Strong brand with perceived quality & desirable destination 3. Willingness/propensity of STO to promote region as a key destination 4. Reasonably close proximity to Perth 5. Popularity of Australia as an international destination 6. Proven revenue generator in the caves & lighthouse attractions 7. Genuine natural & manmade attractions 8. Strong membership base 9. Website & Margaret River Visitor Centre already well established & well used 10. Chinese emerging market 11. Need for WA mining industry to expand provides ongoing opportunity 12. High accommodation occupancy rate in Perth could present opportunities to more directly accommodate travellers 13. Establish an airport closer to Margaret River 14. Low cost airlines provide opportunity for more intra & interstate travel 15. Opportunity to better package the range of AMRTA & regional product 16. Famil opportunities from visiting national & international journalists 17. Parochial issues effecting cooperative marketing with	competitive influences. **Reasonably close proximity to Perth** **Popularity of Australia as an international destination** **Proven revenue generator in the caves and lighthouse attractions** **Genuine natural and manmade attractions** **Strong membership base** **Website and Margaret River Visitor Centre already well established and well used** **Chinese emerging market** Chinese boom expected to continue for at least the next decade. The market desperately needs to be fed product and information in Mandarin if it is to be exploited. While this market may take some years to develop, there is an opportunity for AMRTA to start establishing the region as one of the first destinations these travellers will visit. **Need for WA mining industry to expand provides ongoing opportunity** Capitalise on growth in Perth and its centre of the WA mining boom to attract more visitors to the region, whether that be from business tourism or increase of new permanent residents. **High accommodation occupancy rate in Perth could present opportunities to more directly accommodate travellers** **Establish an airport closer to Margaret River** **Low cost airlines provide opportunity for more intra and interstate travel**	**Confusion over what is in Margaret River town, as opposed to the region** **Lack of flight options in to Margaret River to cater for business and international tourists** **Lack of high energy experience** **Strong Australian dollar making overseas travel a cheaper alternative to Australians** **Perth's lack of flight and accommodation capacity restricting leisure visitors into the city and then on to Margaret River** **More scheduled and cheaper flights making overseas travel a cheaper alternative to Australians** **Inter-Asia travel becoming cheaper and more accessible** **Online booking and member websites competing against margaretriver.com** i.e. Qantas, RAC, AAA, Wotif, Last minute, Margaretriveronline and own member websites. **Distance makes it more difficult for WA and Margaret River to meet the 'short break' holiday trend expected from domestic east coast tourists** **Increasing prices for housing, interest rates and petrol**	

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
the neighbouring RTO 18. Perceived as overpriced & too busy 19. Confusion over what is in Margaret River town, as opposed to the region 20. Lack of flight options in to Margaret River to cater for business & international tourists 21. Lack of high energy experience 22. Strong Australian dollar making overseas travel a cheaper alternative to Australians 23. Perth's lack of flight & accommodation capacity restricting leisure visitors into the city & then on to Margaret River 24. More scheduled & cheaper flights—overseas travel a cheaper alternative to Australians 25. Inter-Asia travel becoming cheaper & accessible 26. Online booking & member websites competing against margaretriver.com 27. Distance—difficult for WA & regions to meet east coast demand for "short break" holidays 28. Higher prices for housing, interest rates & petrol	**Opportunity to better package the range of AMRTA and regional product** **Famil opportunities from visiting national and international journalists**		

Tasmania

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Northern Tasmania Development 2007 **Northern Tasmania Development Strategic Plan** http://www.northerntasmania.org.au/documents/strategic_plan.pdf Key issues: 1. Grow visitation & yield 2. Enhance range of quality, events, activities 3. Increase repeat or referral visits 4. Strengths: Northern Tasmania's people, diverse environments, attractions, activities & events 5. Grow & develop labour force—attract & retain labour, improve productivity, enhance HRM 6. Tourism development & integration 7. Marketing collateral/guides for touring routes/clusters/hub regions 8. Develop events 9. Opportunities for product & infrastructure development 10. Establish industry development programs to support best practice 11. Establish a visitors website 12. Regular northern Tasmania tourism industry forums for networking 13. Portfolio of quality tourism images 14. Upgrade of visitor facilities. 15. Visiting Journalists' Program & industry famils 16. Accurate data that informs policy	**Grow visitor numbers and yield** **Diverse island experiences—enhance range of quality, events, activities** **Increase repeat or referral visits** **Strengths: spirit and friendliness of northern Tasmania's people, diverse environments, attractions, activities and events** **Labour force—growth and development—attract and retain labour, improve productivity, enhance HRM** Support private, public & community businesses to grow and develop their labour force. Enable them to attract and retain labour. Improve productivity & enhance human resource management skills & knowledge. **Tourism development and integration** Facilitate the formation of new tourism associations where none exist. **Marketing collateral and guides for touring routes, clusters and hub communities** **Develop events** **Identify strategic opportunities for product and infrastructure development** **Establish industry development programs to support best practice** **Establish a visitors website** **Convene regular Northern Tasmania Tourism Industry Forums for networking**		**Accurate data that informs policy** Demographic data and information to inform policy in tourism, community and economic development. **Regional development framework—** brings together northern Tasmania, southern Tasmania and the Cradle Coast region to work together to advance the interests of the state. **Develop tourism industry and community understanding and engagement** **Develop, implement & monitor tourism strategies, projects & initiatives with private & public sectors to ensure cohesive development & marketing** **Branding and promoting to target markets both domestically and internationally**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
17. Regional development framework 18. Develop industry/ community understanding & engagement 19. Develop, implement & monitor tourism strategies, projects & initiatives with private & public sectors to ensure cohesive development & marketing 20. Brand & promote to target markets both domestically & internationally	**Establish a portfolio of quality tourism images** **Facilitate the upgrade of visitor facilities.** **Support Visiting Journalists' Program and industry famils.**		
Launceston City Council, Tourism Tasmania, Northern Tasmania Development and SCA Marketing and Red Inca 2005 **Launceston Tourism Plan 2005–2010** http://www.launceston.tas.gov.au/upload/2802/tourismplan.pdf Key Issues: 1. Future market for Launceston could be high yield travellers 2. Experience development 3. Branding & structural delivery 4. Design product to meet market needs & then brand & promote them 5. Increased competition necessitates action to ensure continued viability 6. Increased competition may erode market share 7. Historically uncoordinated development 8. Brand development not aligned with market needs & product development 9. Maintain/lift service &	**Future market for Launceston could be high yield travellers** **Experience development** Fun & relaxation, adventure & relaxation, adventure, wilderness & fun, culture, history and nature, traditional touring markets **Branding and structural delivery**	**Design product to meet those needs and then to brand and market the experiences.** **Increased competition necessitates action to ensure continued viability** **Increased competition may erode market share** Short Tour—are buying a touring route (Tamar Valley) and using Launceston as a base. Increased services (particularly accommodation) in the region may erode market share. **Historically uncoordinated development** Historically, Tasmania has a track record of developing tourism product in "bits". The layered approach to product development results in poorly integrated experiences. **Brand has been developed in isolation from experience development and visitor needs.** **Maintain and lift service and infrastructure standards among operators in a maturing market to ensure continued competition on quality**	**Less about the marketing of destinations, more about engaging visitors in experiences** **Identify and maximize opportunities in terms of visitor attraction, retention and yield** **Nurture and sustain the traditional touring market** **Exploring the experiential needs of emerging high yield visitor segments** **Develop product experiences for high yield experience seekers** **Resource strategies appropriately** Fund a permanent full time position to undertake the management and implementation of strategy. **Research into product development testing and traditional touring market** **Shift from traditional to new high yield experience segments** This strategy is about managing the transition from a market dominated by

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
infrastructure standards in a maturing market to ensure continued competition on quality 10. Currently few integrated tourism experiences exist that would appeal to new segments. 11. Predicted that state-wide visitor growth will plateau 12. Numerous threats i.e. lack of direction, resources, investment, leadership 13. Poor industry structures 14. Lack of expertise/structure and resources (physical & financial) to deliver strategy 15. Poor understanding by industry of need for change 16. Lack of transport, infrastructure, service quality and integrated adventure experiences to provide for new high yield market 17. LCC does not adopt strategy 18. No uptake in Launceston community & industry 19. Less about the marketing of destinations, more about engaging visitors in experiences 20. Identify & maximize opportunities in terms of visitor attraction, retention & yield 21. Nurture & sustain the traditional touring market 22. Exploring the experiential needs of emerging high yield visitor segments 23. Develop product experiences for high yield experience seekers		In order to lift the standards of existing product and services to a level that will stave off regional competition, increased expenditure by private operators is required. In the short term, this will erode margins. If, however, industry does not differentiate on quality then they will be forced to compete on price and in doing so, erode margins even further. **Few integrated tourism experiences currently exist that would have high levels of appeal to these segments** **Predicted that State-wide visitor growth will plateau over the next few years** **Numerous threats i.e. lack of direction, resources, investment, leadership** Lack of cohesive focus, disunity of direction, profit margin narrows, tourism strategy not implemented due to lack of resources, investors go to other clusters, greater than expected downturn in visitors in this sector, structural changes not accepted, external influences, lack of upgrading, lack of integration between service providers, experiences and adventures, lack of desire by industry to embrace a cultural change with regard to a different approach, lack of identifiable proactive leaders willing to move from the comfort zone to explore new markets and new approaches, big money and resources required to develop integrated product to meet the needs of this newly identified market segment. **Poor industry structures** Current structures do not allow for industry representative to move forward on this strategy with a mandate. **Lack of expertise, structure and resources**	traditional touring segments to one in which new high yield experience segments dominate.

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
24. Resource strategies appropriately 25. Research into product development testing & traditional touring market 26. Shift from traditional to new high yield experience segments		**(physical and financial) to deliver the strategy** **Poor understanding by industry** May not embrace and invest in the cultural change required to deliver the strategy successfully. LCC may not adopt strategy. No uptake in Launceston community and industry. **Lack of transport, infrastructure, service quality and integrated adventure experiences to provide for new high yield market**	

Northern Territory

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Australian Tourism Industry Association, Alice Springs Town Council, Chamber of Commerce Northern Territory, Department of Natural Resources, Environment and the Arts, Department of the Chief Minister, Tourism NT Prepared by national Centre for Studies in Travel and Tourism May, 2005 **Strengthening the position of Alice Springs Tourism: Taking the next steps** http://www.tourismnt.com.au/nt/system/galleries/download/Industry/ASP_Action_Plan_Original_20051222.pdf Key issues: 1. Passion, experience & commitment of some local operators 2. Strong & competitive product 3. Market awareness 4. Real town not tourism park 5. Wide variety of established attractions 6. Mature infrastructure 7. Target affluent interstate markets 8. Link with other tourism & government bodies 9. Develop links with Uluru 10. Develop & present new products to meet market expectations 11. Develop international air access 12. Develop Indigenous tourism 13. Demand for experiential	**Passion, experience and commitment of some local operators** **Strong and competitive product attributes** **Strong basic market awareness of where Alice Springs is** **Real town not tourism park** **Wide variety of established attractions** **Mature infrastructure (Casino, conference centre)** **Develop more affluent interstate markets** **Develop links with other tourism and government bodies** **Develop links with Uluru** **Develop and present new products to meet market expectations** **Develop Alice Springs international air access** **Indigenous tourism** Core components of a travel experience to the NT. There is an opportunity to establish Alice Springs as a national and international centre for Indigenous art and craft. **Demand for experiential tourism – Alice Springs** Needs to substantially expand and improve the types of natural and cultural experiences offered to visitors.	**Marketing process not fully understood** **No structure of responsibility for marketing Alice Springs** **Region not unified but splintered** **Uncertain competitive focus** **Brand context too multi-layered to be effective (Australia, Northern Territory, Central Australia, Alice Springs)** **Travel industry indifference—easier to sell Uluru** **The widespread incorrect association between Alice Springs and Ayers Rock might imply weak brand association** **Alice Springs has not translated market awareness into interest or intention** **Uluru has more market awareness and gets international air access** **Experience of Alice Springs may impinge on repeat visitation (service, local problems)** **Indigenous tourism is currently difficult to organise, access and package with confidence** **Failed dependence on lower value mass market rather than higher value niche markets** **Lack of role clarity and coordination between key public and private sector stakeholders** A more unified approach to destination	**Leadership and coordination—**build stronger regional partnerships (public and private) which can provide the leadership and resources to manage and grow a sustainable tourism industry. **Destination management—**develop the soft infrastructure (business, hospitality and service skills) to grow profitable enterprises and the hard infrastructure necessary to underpin the future development of the industry (accommodation, attractions, road and transport networks, revitalised city centre, international airport, etc). **Marketing and position management—**develop a marketing implementation strategy which can take forward the positioning and branding framework developed by NTTC and the industry. **Products, experiences and services—**develop, package and present unique products, visitor experiences and services which offer a competitive point of difference. **Collation and summary of current and past research/reports** Need to pull together and align past and present research and to gain some collective opinion on how tourism should be developed. **Other regions generally identified as competitors rather than an asset or competitive advantage to link with** **Interstate visitors compare a trip to the NT to a trip to an overseas destination**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
tourism 14. Develop heritage tourism 15. Marketing process not understood 16. No responsibility for marketing 17. Region not unified but splintered 18. Uncertain competitive focus 19. Brand context too multi-layered to be effective 20. Travel industry indifference—easier to sell Uluru rather than Alice Springs 21. Widespread incorrect association between Alice Springs & Uluru 22. Market awareness not translated into interest or intention 23. Uluru has more market awareness & gets international air access 24. Experience may impinge on repeat visitation 25. Indigenous tourism is currently difficult to organise, access & package with confidence 26. Failed dependence on lower value mass market rather than higher value niche markets 27. Lack of role clarity & coordination between key public & private sector stakeholders 28. Upgrade & refresh visitor services 29. Train staff, improve service 30. Leadership & coordination 31. Destination management 32. Marketing & position	**Heritage tourism** —rich European and Indigenous heritage and a unique natural desert environment however these product strengths are not being presented to their full potential.	management and marketing is needed. **Visitor services**—need to upgrade and refresh existing visitor services including shopping hours, presentation and activities offered in the mall. **Need to train staff to improve customer service**	**Destination Life Cycle**—many operators feel that Alice Springs has been in a state of inertia over the past 2 years. Alice Springs is not keeping pace with more competitive destinations such as Cairns and Broome. This includes the look and feel of the destination together with the types of products and visitor experiences offered.

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
management 33. Products, experiences & services 34. Collation & summary of current & past research 35. Other regions identified as competitors rather than an asset or competitive advantage to link with 36. Interstate visitors compare a trip to NT to overseas travel destinations 37. In stagnation			
Australian Tourism Industry Association, Alice Springs Town Council, Chamber of Commerce Northern Territory, Department of Natural Resources, Environment and the Arts, Department of the Chief Minister, Tourism NT 2007 **Taking the Next Steps: 2007 update** http://www.tourismnt.com.au/nt/system/galleries/download/Industry/action_plan_alice_springs_2007.pdf Key Issues: 1. Opening of the Alice Springs Convention Centre 2. Extended Ghan passenger rail service to Darwin—more stopovers in Alice 3. Development of the Larapinta Trail 4. Japanese charter flights 5. Gilligan's Backpackers moved to Alice bringing their distribution channels 6. Announcement of Tiger Air from Melbourne & extra Qantas flights from Sydney 7. Innovation in industry	**Opening of the Alice Springs Convention Centre** **Commencement of the extended Ghan passenger rail service to Darwin and the promotion of stopovers in Alice** **Development of the Larapinta Trail** **Japanese charter flights** **Gilligan's Backpackers moving into Alice Springs bringing their distribution channels** **Announcement of Tiger Air from Melbourne and extra Qantas flights from Sydney** **Innovation in industry product development** **Measures put in place to reduce anti-social issues** **Desert environment/ landscapes** Landscapes of central Australia, colours of Namatjira country, Desert Park, Indigenous story lines and connections, desert cuisine, flora / fauna	**Demise of Ansett Airlines** **Bali bombings** **Outbreak of SARS** **Iraq war** **Decline in international airline access and connectivity** **The significant and rapid changes to the national and international tourism distribution channels** **The changing profile of the local industry, i.e. less locally owned operators** **Steady decline in the series coach touring programs and the move to FIT who then get discouraged by the difficulty and expense of accessing the Territory** **Press attention on anti-social issues** **More competition from other national and international destinations**	**In 2004 Tourism NT embraced a destination approach to marketing the NT** Alice Springs and Surrounds was identified as one of six priority destinations within the NT and as such would receive individual marketing attention. **Marketing of Alice Springs region as it's own destination** **Leadership and coordination** To build stronger regional partnerships (public and private) which can provide the leadership and resources to manage and grow a sustainable tourism industry. **Destination management** To develop the soft infrastructure (business, hospitality and service skills) to grow profitable enterprises and the hard infrastructure necessary to underpin the future development of the industry (accommodation, attractions, road and transport networks, revitalised city centre, international airport, etc). **Marketing and position management** To develop a marketing implementation strategy which can take forward the positioning and branding framework developed by Tourism NT and the industry.

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
product development 8. Measures put in place to reduce anti-social issues 9. Desert environment/ landscapes 10. Indigenous art & craft 11. Outback heritage 12. Outback adventure 13. Demise of Ansett Airlines 14. Bali bombings 15. Outbreak of SARS 16. Iraq war 17. Decline in international airline access/connectivity 18. Significant/rapid changes to the national/international distribution channels 19. Changing profile of local tourism, less locally owned 20. Decline in coach touring & the move to FIT who get discouraged by difficulty & expense of accessing NT 21. Press attention on anti-social issues 22. Increased competition nationally & internationally 23. Tourism NT embraced a destination approach to marketing NT 24. Marketing of Alice Springs as its own destination 25. Leadership & coordination 26. Destination management 27. Marketing & position management 28. Products, experiences & services	**Indigenous art and craft** Galleries, Aboriginal communities, art styles of central Australia, characters, story lines and connections with people and country, events/festivals, Hermannsburg. **Outback heritage** RFDS, School of the Air, Telegraph station, events, A Town Like Alice, Afghan Cameleers, pastoralists, mining history, outback characters/personalities. **Outback adventure** MacDonnell Ranges, Red Centre Way, Desert Guides, camping, climbing, trekking, Larapinta Trail, outback base camp, outback tours.		**Products, experiences and services** To develop, package and present unique products, visitor experiences and services which offer a competitive point of difference.

Appendix F: Local Level Strategies

New South Wales

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Manly Council 2006 **Manly Sustainability Strategy: For Today and Future Generations** http://www.manly.nsw.gov.au/Sustainability-Strategy.html Key issues: 1. Environmental, social & cultural change 2. Sustainable Tourism, Manly—a thriving tourist area 3. Work with Universities for research 4. Boost rural tourism opportunities 5. Conservation—funding & awareness 6. Minimise the negative impacts, acknowledge the positive effects 7. Achieve greater awareness of natural & cultural environments 8. Educate visitors/community about tourism 9. Ensure more appropriate urban development 10. Alleviate visitor pressures 11. Encourage reduction in waste/litter 12. Promote public transport & decrease reliance on private vehicles 13. Sustainable coastal tourism destination development 14. Banning of commercial fishing—contamination	**Eco-initiatives, social and cultural change** **Sustainable tourism, Manly is a thriving tourist area** **Work with Universities for research** Working with Universities to better understand the tourism market and explore mechanisms for local councils to develop policy, planning and regulatory work to address issues and grow tourism. **Boost rural tourism opportunities** **Conservation—funding and awareness** Conserve important areas through increased funding and awareness.	**Minimise the impacts, yet acknowledge the positive effects i.e. economic** **Assist in achieving a greater awareness of our natural and cultural environments** **Educate visitors and the community about tourism** **Ensure more appropriate urban development** **Alleviate visitor pressures** **Encourage reduction in waste and litter** **Promote public transport and a decrease in reliance on private vehicles.** **Sustainable coastal tourism destination development** Ensuring tourism growth does not compromise the amenity of local residents and the natural environment. **The banning of commercial fishing—contamination** Banning of commercial fishing and advice not to eat large quantities of fish caught in Sydney Harbour due to significant potential health risks associated with contamination.	**Prepare a sustainable coastal tourism strategy in response to research** **Develop visitor information centres** **Secure Manly tourism operators participation in strategies and plans** **Collaboration** **Logo marketing campaign** **Keep abreast of best practice for sustainable tourism management internationally** **Establish a set of indicators across 'triple bottom line'** **Update previous studies to assess changes** **Importance of the aquatic environment i.e. water quality and tourism** **Develop environmental management plans which consider the triple bottom line** **Manly has relatively little industry—economy based primarily on service provision, including tourism**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
15. Prepare a tourism strategy in response to research 16. Develop visitor information centres 17. Secure Manly tourism operators participation in strategies & plans 18. Collaboration 19. Logo marketing campaign 20. Keep abreast of international best practice for sustainable tourism 21. Develop triple bottom line indicators 22. Update old studies—assess change 23. Importance of the aquatic environment i.e. affects on water quality & tourism 24. Develop environmental management plans that consider the triple bottom line 25. Manly has relatively little industry—economy based primarily services			
Orange City Council 2003 **Orange City Cultural Plan** http://www.orange.nsw.gov.au/download.cfm?DownloadFile=3CF04011-E7F2-2F96-3F3463F6485B33B2 Key issues: 1. Established partnerships in heritage and culture—increase tourism industry involvement 2. Develop new cultural tourism products	**Established partnerships in heritage and culture—increase tourism industry involvement** Maintain existing partnerships between heritage and cultural groups, i.e. Arts OutWest, Explorer Country Tourism and Orange Community Radio. Build and maintain partnerships between heritage and cultural groups to create synergies between arts, heritage and tourism. **Develop new cultural tourism products** Encourage the development of new cultural tourism products integrating cultural services provided by the city and develop the food		

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
	and wine sector. Develop heritage and museum programs that promote awareness of the identity and heritage attractions of Orange.		
Orange City Council 2006 **Orange City Council Strategic Heritage Plan** http://www.heritage.nsw.gov.au/docs/incentives/hs_orange.pdf Key Issues: 1. Tourism and museum development 2. Maintain and expand walking trails 3. Maintain links with schools 4. Turn old mine sites into a public education/tourism facility 5. Build tourism product based on Cobb & Co. heritage 6. Use Visitor Information centres to promote cultural heritage sites and tours	**Tourism and museum development in Orange** Promote cultural heritage and museum development opportunities. Provide support to community and tourism groups in the development of cultural heritage tourism projects and programs. **Maintain and expand walking trails** To maintain the various Orange and village heritage walking trails and identify opportunities to expand these trails. **Maintain links with schools** To maintain network links with the area's schools through council's education project team.		**Turn the Wentworth Mine site into a public education/tourism facility** **Build tourism product based on Cobb & Co. heritage** Provide ongoing support and staff resources to the research and heritage tourism project Cobb & Co NSW. Develop tourism opportunities related to Cobb & Co. **Use the Orange Visitor Information Centre to promote cultural heritage sites and tours** To continue to promote and identify new opportunities for cultural heritage tourism through the ongoing promotion and identification of sites and tours at the Orange Visitor Information Centre.

Victoria

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Country Victoria Tourism Council 2001 **Planning for Tourism: Summary of Wangaratta Tourism Strategy** http://www.decipher.biz/PopupPages/packet_frame.aspx?packet_id=FN5cYLxuofw%3d&record_usage=BFwHmG4lRqg%3d&pathway_id=vlZe9Gyx0hU%3d&client_id=a2GSpnDbruI%3d&client_code=4o0GN%2fQ1BHkUXoXlKl1foQ%3d%3d Key issues: 1. Rural City of Wangaratta has tourism component in its corporate plan. 2. Support and encourage tourism development 3. Incorporate all major events and festivals into a cultural and tourism activities and events calendar 4. Support community based festivals within the rural city of Wangaratta 5. Active involvement with the legends, Wine and High Country regional Campaign Committee **6.** Implement key tourism initiatives in keeping with Councils statement of Tourism Principles	**Rural City of Wangaratta has tourism component in its corporate plan** **Support and encourage tourism development** **Incorporate all major events and festivals into a cultural and tourism activities and events calendar** **Support community based festivals within the rural city of Wangaratta** **Active involvement with the legends, Wine and High Country regional Campaign Committee** **Implement key tourism initiatives in keeping with councils statement of tourism principles**		
Tourism Alliance Victoria May, 2005 **Planning for Tourism Fact Sheet: Summary of Murrindindi Tourism Strategy** http://www.vtoa.asn.au/downloa	**Murrindindi Shire Council has a tourism plan that provides direction & focus for its efforts & resources** **Sustainable growth and development** **Economic development and tourism**		

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
ds/TAV%20Fact%20Sheets/Planning%20for%20Tourism%20Fact%20Sheet%20Final.pdf 1. Council has a tourism plan that provides direction & focus 2. Sustainable growth and development 3. Economic development & tourism 4. Coordinated approach to visitor information services across the shire 5. Continue to strengthen & develop the tourism industry 6. Pursue tourism product & infrastructure development 7. Participate in cooperative marketing	**Pursue a more coordinated approach to visitor information services across the shire** **Continue to strengthen and develop the tourism industry** **Pursue tourism product & infrastructure development** **Participate in cooperative marketing**		
Tourism Alliance Victoria May, 2005 **Functions of a local Tourism Association: Summary of Nillumbik Tourism Strategy** http://www.surfcoast.vic.gov.au/Tourism/Documents/LTA_Fact_Sheet.pdf Key issues: 1. Small tourism destination, not well known 2. Strengths in natural & arts/cultural assets 3. It has a business plan 4. Coordination, representation & partnerships 5. Tourism business development 6. Tourism industry research & development 7. Public relations & communication	**Nillumbik—small tourism destination, not well known nationally or internationally** **Strengths are in its natural and arts/cultural assets** **It has a business plan – it's marketing strategy is a large component with a focus on positioning, promotion, product development, professionalism and standards, visitor information services, infrastructure and services**		**Coordination, representation and partnerships** **Tourism business development** **Tourism industry research and development** **Public relations and communication**
Latrobe City Council 2006 **Latrobe 2021: The vision for**	**The strength of Latrobe Valley lies in its diversity**		

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Latrobe Valley http://www.latrobe.vic.gov.au/WebFiles/Council%20Documents/Council%20Plan/Latrobe%202021%20- Key issues: 1. Strength: its diversity 2. Strengthen the link between tourism and economic development 3. Promote & support development of tourism & events 4. Beautiful natural environment: lakes mountains, alpine/snowfields 5. Easy access 6. Served by highly developed industry	**Strengthen the link between tourism and economic development** **Promote & support the development of tourism & events** **Latrobe Valley has a beautiful natural environment with mountains, lakes, alpine country, snowfields** **Easy access** **Well served by a highly developed tourism industry**		

Queensland

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Gold Coast City Council 2007 **Gold Coast 2010: Economic Development Strategy—Action Plan** http://businessgc.com.au/uploads/eds_2007_actionplan.pdf Key Issues: 1. The development has been led by tourism—most prominent industry 2. Build on strengths i.e. natural attractions, beaches, events & entertainment, strategic location entrepreneurship. 3. Develop food tourism 4. Industry development i.e. training, research, reviewing practices 5. Investment attraction 6. Collaborative marketing/positioning 7. Medical, tourism & transport hub 8. Develop transport i.e. aviation 9. Build on previous successful branding by promoting strengths 10. Dedicated tourism branch & development of a tourism strategy 11. Development of exclusive shopping & dining experiences 12. Become major centre for themed attractions in southern hemisphere 13. Largest subtropical rainforest & World Heritage	**The city's development has been led by tourism – tourism is the Gold Coast's most prominent industry** **Build on strengths: natural attractions, beaches, surfing, the hinterland, theme parks, urban development, events and entertainment, strategic location, investor confidence supported by national and state level institutions, regulatory frameworks, entrepreneurship (in technology, tourism, urban design, and urban management), good sub-tropical climate and high quality of lifestyle** **Develop food tourism** To establish a higher profile for the city as a food tourism destination. Develop stronger links between local producers, tourism operators and the food service industry. Food processing is the largest manufacturing industry in Australia. Food tourism has strong appeal to high income consumers and tourists. **Industry development i.e. training, research, reviewing practices** Training and development, research into the hinterland's tourism industry capabilities and opportunities, reviewing local tourism operator practices to ensure optimal performance and investigation of youth adventure tourism opportunities. **Investment attraction** Enhance the destination competitiveness to attract new businesses and infrastructure to support the industry. **Collaborative marketing and positioning** **Medical, tourism & transport hub**	**Ongoing investment in infrastructure** Need to meet the infrastructure needs for businesses and residents in a high growth region, but also meeting the needs associated with tourism development and growth. **Public safety is of critical importance for visitors** Effective management of events such as New Year's Eve and Schoolies. **Perception that Surfers Paradise has lost some of its appeal and relevance to local residents** **Minimal funding for infrastructure including public transport, cultural facilities & ongoing city maintenance** **The negative impacts of international tourism, i.e. high rate of foreign language signs** **Significant shifts in population and fluctuations in demand for outputs from key industries** **Structural issues facing the Gold Coast economy** **One of the fastest growing regions in Australia for more than four decades, with historically strong tourism and urban development industries** **Life-long learning is at the core of the economic development objectives** **Rapid technological and social change** **Globalisation** **Increased competition and changes to**	**Supporting existing industry-led associations for each of the key industries and creating ones for industries without a peak body, to implement competitive strategies** **Develop new markets, produce new products and increase profitability** **Strengthen and diversify the city's economic base** To achieve sustainable economic prosperity in a competitive global economy will require Gold Coast to continue to diversify its economic base to ensure a more balanced structure. **Investment attraction** Develop and implement a business attraction and infrastructure development program to enhance the quality and competitiveness. **Develop traditional industries like sporting and tourism events** **Promoting flexible networks** **Research—undertake a gap analysis between the Gold Coast and leading Australian and international tourist destinations** **Produce an annual review of the tourism industry to inform local businesses and attract new businesses to the city** **Assist in funding the audit and mapping of businesses** **Experiencing large migration—can draw**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
sites 14. Broaden narrow economy—traditionally focused on tourism 15. Establish & cooperatively promote a 'whole of city' branding for tourism & business 16. Develop food tourism industry 17. Increase economic impact of tourism investment, visitor nights/ spend & infrastructure development 18. Focus on high yield segments i.e. business tourism 19. Expand into nature-based tourism & develop the youth tourism market 20. Develop networks/business clusters 21. Attract study tours & study tourism 22. Development of the Convention & Exhibition Centre. Grow business tourism and conferences 23. Develop a World Heritage Rainforest Interpretive Centre for ecotourism 24. Upgrade roads, rail & airports 25. Good universities & hospitals 26. Ongoing investment in infrastructure 27. Public safety—critical for visitors 28. Perception that key areas have lost their appeal & relevance to locals 29. Minimal funding for infrastructure including	Maximise opportunities for and benefits from the continued development of the Gold Coast Airport and surrounding areas. **Develop transport i.e. aviation** Communication of the benefits and services of the Gold Coast Airport and its advantages to the city. **Build on previous successful branding of the City as a multi-dimensional destination by promoting strengths and attributes** **Dedicated tourism branch and development of a tourism strategy** **Development of exclusive shopping and dining experiences—from beach to boutique** **Consolidation as the major centre for themed attractions in southern hemisphere** **Preservation of the largest subtropical rainforest remnant in the world, more than 100,000 ha of nature reserves, and World Heritage sites** **Broaden the city's previously narrow economic ease, which was traditionally focused on tourism, construction and retail trade** **Establish and cooperatively promote the BusinessGC brand and identity for key industries, including a 'whole of city' branding approach for tourism and business** **Develop food industry—food tourism destination** Food processing is the largest manufacturing	**ways for being competitively successful** **Skills and knowledge must continually be upgraded in order to face the challenges of the future** **Jobs will increasingly require rapidly changing skill-sets** **Organising key industry clusters to prioritise competitive challenges and opportunities**	**on the growing population catchment and skilled labour pool settling in the region. Population growth will drive the city's employment growth** **Industry development training & skills development** Conduct targeted training and development workshops to improve the visitor experiences. Ongoing need for investment in skills development, as the traditionally low paying service industry jobs associated with tourism need to offer higher 'value added' services to justify higher incomes. **Leverage the opportunities associated with the Cooperative Research Centre (CRC) for Sustainable Tourism being located at Griffith University**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
public transport, cultural facilities & ongoing maintenance 30. The negative impacts of international tourism, i.e. high rate of foreign language signs 31. Significant shifts in population & fluctuations in demand for outputs from key industries 32. Structural issues facing the economy 33. Fast growth region, past strengths in tourism & urban development 34. Life-long learning 35. Rapid technological & social change 36. Globalisation 37. Increased competition, changes to competitive advantages 38. Continually upgrade skills & knowledge to face future challenges 39. Jobs will increasingly require rapidly changing skill-sets 40. Organise key industry clusters to prioritise competitive challenges & opportunities 41. Support industry-led associations 42. Develop new markets, produce new products & increase profitability 43. Strengthen & diversify the City's economic base 44. Investment Attraction 45. Develop traditional industries like sporting & tourism events	industry in Australia and is evolving into the production of higher order, higher value goods for the international export market. Food tourism has strong appeal to high income consumers and tourists. To be recognised for world class food and wine products with increased levels of export activity. Higher profile for the city as a food tourism destination. Develop stronger links between local producers, tourism operators and food service. **Increased economic impact in the areas of business investment, visitor nights, and local tourism expenditure and infrastructure development** **Focus on higher yield segments such as business tourism and consolidating resources within emerging segments that show high growth potential** **Expansion into nature-based tourism and development of the youth tourism market** **Develop networks and business clusters** **Attraction of study tours and study tourism** **Development of the Convention and Exhibition Centre and growth in the business tourism market and increase international conferences** **Development of a World Heritage Rainforest Interpretive Centre for environmental tourism** **Upgrades in roads, rail and airports** **Good universities and hospitals that can cater for tourists**		

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
46. Promoting flexible networks 47. Research—gap analysis between destinations in Australia & international tourist destinations 48. Produce annual review of the tourism industry to inform business & attract investment 49. Fund the audit & mapping of businesses 50. Large migration will drive job growth—draw on the growing population & skilled labour pool 51. Industry development t raining & skills development 52. Opportunities associated with the STCRC being located at Griffith			

South Australia

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
City of Port Adelaide Enfield 2006 **Integrated Strategic Tourism Plan** http://www.portenf.sa.gov.au/webdata/resources/files/Integrated_Strategic_Tourism_Plan_2006-2010.pdf Key issues: 1. Develop commercial accommodation 2. Develop products 3. Strengthen interpretation & tourism signage & integrate it into in-destination marketing 4. Street enhancement of strip centres with tourism potential 5. Ongoing funding to ensure infrastructure complies with Australian Standards 6. Improve public transport ex-capital city & between tourism nodes associated with population growth 7. Invest in core basic visitor facilities 8. Development of the State Sports Park to create a major sporting node, including training & accommodation provisions 9. Encourage tourism investment 10. Encourage establishment of a dolphin interpretive centre on the waterfront in Port Adelaide	**Commercial accommodation** Re-use of old pubs etc. **Develop products i.e. cycling, fishing & promenading** Investment in quality of the coastal path for cycling and promenading. Significant upgrade in jetties to increase visitation (promenade and fish). Develop the area's history and heritage through restoration, adaptive reuse, sympathetic new development, interpretation & access. Cultural products i.e. storytelling, interpretation and promotion of the cultural heritage. Arts in Port Adelaide provide a cultural element important to the development of a distinctive Port Adelaide image, style and community culture. **Strengthen interpretation and tourism signage and integrate it into in-destination marketing** Street banners; event information notice poles; integrated tourism and interpretive signage. **Street enhancement of strip centres with tourism potential i.e. street sculpture linked to brand strategy** **Ongoing funding to ensure infrastructure complies with Australian Standards e.g. bus stops, wheelchair ramps** **Improve public transport ex Adelaide CBD and between tourism nodes associated with population growth** **Invest in core basic visitor facilities parking, toilets and improve safety including lighting** **Development of the State Sports Park to**	**Need to better align marketing with SATC international initiatives** **Significant infrastructure impediments to tourism development** Poor image due to run down buildings and a lack of accommodation, waterside dining; maritime heritage attractions and leisure shopping. Upgrade car parking, street infrastructure, toilets, boat ramps, lighting and design. Lack of short term accommodation and 'branded' backpacker accommodation. **Transport related issues i.e. poor public transport access from Adelaide CBD, lack of car parking, private ownership of boat ramps, no rail or bus interchange in city centre, poor railway station condition.** **Heavy transport traffic routes through the heart of the Port tourist area** **Poor signage—particularly interpretive signage** **Lack of suitable public toilets** **Currently not reaching its investment potential—i.e. vacant shops which are underdeveloped** Shopping precincts lack quality ambience. Lack of critical mass 'high end' tourism shopping. Negative image due to empty shops, poorly maintained buildings. **Lack of defining 'flagship' events** **Lack of up to date 'consumer' perceptions data** **Brand image not positive** **Crime and safety issue—run down and**	**Indigenous tourism** Aboriginal heritage is strongly associated with the area and also provides opportunities to distinguish the brand. Aboriginal culture is significant and there is a need to promote the experiential interaction for visitors. **Encourage the uptake of industry accreditation** **Population growth will develop infrastructure** Population growth will 'fast track' investment in associated tourism infrastructure i.e. waterfront promenades and waterfront dining and cafés. Need to redevelop the waterfronts as vital assets, shopping, dining etc. **Increase access to the city centre** Third river crossing will decrease heavy vehicles and improve amenity in Port Adelaide Centre. **Further encouragement of business development with tourist operators; skills, accreditation and cooperation** **State management plans emerging regarding local areas—need to link and integrate with local council plans** **Enthusiastic core group of industry tourism business operators and volunteers** **High quality Visitor Information Centre in good location—committed staff.** **Visitor Information Centre's customer statistical recording system** **Refine the brand strategy to strengthen**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
11. Develop a brand strategy, invest in brand tracking, create a tourism logo, catalogue unique selling features/priority icons 12. Use brand to shape marketing, product development & infrastructure decisions 13. Cooperative marketing 14. Develop iconic events 15. Marine promotion, partnerships with conservation agencies, increase tourism/ community awareness of ecosystem/environmental attributes 16. Number of original Port heritage buildings still in place 17. Development of thematic walks 18. Strength in disabled access but needs better marketing 19. Need to better align marketing with SATC international initiatives 20. Infrastructure impediments to tourism development 21. Transport issues 22. Poor signage 23. Lack of suitable public toilets 24. Currently not reaching its investment potential 25. Lack of defining 'flagship' events 26. Lack of 'consumer' perceptions data 27. Brand image not positive 28. Crime & safety issues 29. Lack of strong marketing body, big investors to drive	**create a major sporting node, including training and accommodation provisions** **Encourage tourism related investment** **Encourage establishment of a dolphin interpretive centre on the waterfront in Port Adelaide** **Brand analysis—develop a strategy, invest in brand tracking research, create a tourism logo, catalogue areas unique selling features, priorities icons** **Use agreed brand strategies to shape marketing, product development and infrastructure decision making across the region** **Cooperative marketing—increase marketing resources and impact** Work with industry to strengthen the cooperative destination development culture. Continue to develop cooperative marketing opportunities with local tourist operators. **Develop events—strategically use iconic events to support the building of brand awareness** Re-prioritising the events support criteria and associated funding support to more clearly use events to build and reinforce the positive attributes of brand Port Adelaide will also bring visitors into the area. Run an annual events forum including an events 'expert' to shape ongoing development and marketing of events. **Environmental—marine promotion, partnerships with conservation agencies, increase tourism/community awareness of ecosystem and environmental attributes** Promotion of a diverse marine environment that is so close to the hub of a major capital	**tired destination** **Marketing—lacks strong industry driven tourism marketing body, big investors to drive marketing, a cooperative marketing culture and resources** **Seasonality – long winter 'off season'** **Build icon products to draw visitors** **Mixed brand identity in local market inhibits marketing impact & lack of brand equity in domestic and international markets** **Perception that it is 'too far away'** **Perceived as environmentally unattractive. Need to develop environmental guidelines for investors and operators** **Maintain and improve water quality** **Lack of money, scientists and research into tourism and the environment. Sustainability—how much tourism can the area sustain?** **A fractured tourism community not providing a united approach to council nor involved in cooperative marketing or product development** **Tourism structure and manageability—**no industry association or formalised structure to drive cooperative tourism development and marketing. **Further environmental degradation is a threat** **Resource use, catchment and other environmental pressures on the, coastal and river marine environments**	**the appeal** **Develop tour packages** **Visitor segmentation and performance indicators** Segments used are a mixture that may not provide the best break down on which to allocate marketing resources across the marketing mix. Performance indicators difficult to achieve. **Investigate ways to strengthen the economic base of retail precincts linked to increased tourism demand through urban design and better policies for development** **Need to define roles and responsibilities** **Lack of resources to facilitate and coordinate implementation of the tourism destination strategy** **Limited involvement of the community** **Constrained budget for marketing tourism** **Resources to monitor effect of human activity on coastal areas**

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
marketing, cooperative marketing & resources 30. Seasonality 31. Build icon products to draw visitors 32. Mixed brand identity in local market inhibits marketing impact & lack of brand equity in domestic & international markets. 33. Perception that it is 'too far away' 34. Seen as environmentally unattractive. Develop environmental guidelines for investors & operators 35. Maintain & improve water quality 36. Lack of money, scientists & research into tourism & the environment & sustainability 37. A fractured tourism community 38. Tourism structure & manageability 39. Further environmental degradation 40. Resource use, catchment & other environmental pressures on coastal & river marine environments 41. Lack of business investment due to destination image 42. Heritage constraints on development—restrictions on use of old buildings 43. Buildings in heritage area being bought as private residences 44. Indigenous tourism 45. Encourage up take of accreditation 46. Population growth will	city. Strengthen partnerships between conservation agencies and the local tourism industry. Increase tourism industry and community understanding and appreciation of the area's unique ecosystem and environmental attributes. **Number of original Port heritage buildings still in place** **Development of thematic walks** **Tourism product has strength in disabled access but needs to be better marketed**	**Lack of business investment due to destination image** **Heritage constraints on development. Excessive restrictions on the adaptive re use of old buildings** **Buildings in Port heritage area being bought as private residences, restricting commercial/tourism opportunities**	

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
develop infrastructure 47. Increase access to city 48. Further encouragement of business development with tourist operators 49. State Management Plans emerging for local areas 50. Enthusiastic group of tourism business operators & volunteers 51. Quality VIC with customer recording system 52. Refine the brand strategy 53. Develop tour packages 54. Visitor segmentation & performance indicators 55. Strengthen the economic base of retail precincts 56. Define roles / responsibilities 57. Lack of resources 58. Limited community involvement 59. Constrained budget for marketing 60. Monitor effect of human activity on coastal areas			

Western Australia

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
City of Albany Council 2005 **City of Albany Tourism Strategy** http://svc010.wic466d.server-web.com/images/albany/CityofAlbanyTourismStrategy.pdf Key issues: 1. Development & management of tourists, attractions & facilities 2. Marketing & promotion 3. Visitor servicing, planning & development facilitation 4. Employ a tourism officer 5. Focus efforts & resources on delivery of core services & management of its existing tourist attractions 6. Develop a tourism marketing plan—build a brand 7. Continue management of development of Albany Regional Airport 8. Town planning & development facilitation 9. Collaborate with major environmental organisations	**Development and management of tourists, attractions, and facilities** **Marketing and promotion** **Visitor servicing, planning and development facilitation** Commence operation of a Visitors Centre. **Employ a tourism development officer** **Focus efforts and resources on delivery of core services and management of its existing tourist attractions** **Develop a tourism marketing plan—build a brand** **Continue management of development of Albany regional Airport**		**Town Planning and Development Facilitation** Establish an appropriately zoned pool of tourism development land and a flexible sustainable approach to tourism proposals. **Collaborate with major environmental organisations**

Tasmania

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Central Coast Council 2004 **Central Coast Economic Development Plan 2004–2009** http://www.centralcoast.tas.gov.au/webdata/resources/files/EconomicDevelopmentPlan20042009.pdf Key issues: 1. Quality visitor experiences through good development 2. Product development & improvement 3. Improve visitor numbers 4. Facilitate strategic alliances to enhance tourism services 5. Establish a VIC Management Committee 6. Develop an integrated tourism marketing plan 7. New tourism signage 8. Develop major events 9. Accreditation plans 10. Review VIC opening hours 11. Develop revenue streams 12. Develop RTO tourism sector health indicators 13. Develop management strategy for the operation of the VIC 14. Volunteer recruitment & training program 15. Develop/promote icons 16. Integrate land use planning recommendations into tourism planning	**Encourage quality visitor experiences through appropriate tourism sector development** **Product development and improvement** **Improve visitor numbers** **Facilitate strategic alliances to enhance tourism services** **Establish a Visitor Information Centre management committee** **Develop an integrated tourism and promotional marketing plan** **Continue new tourism signage** **Develop a major events strategy** **Develop accreditation plans** **Review hours of operation at the Visitor Centres** **Develop revenue streams** **Develop Central Coast tourism sector health indicators**		**Develop management strategy for the operation of the Visitor Information Centre** **Develop volunteer recruitment and training program** **Develop and promote icon attractions** **Integrate land use planning recommendations into tourism planning schemes**

Northern Territory

Document Details	Strengths and Opportunities	Challenges	Recommendations and Strategies
Mataranka Community Government Council 2004/2007 **Business Plan 2004–2005** **Business Plan 2007–2010** http://www.mataranka.nt.gov.au/home/about_us/business_plans Key issues: 1. Opportunities for visitors to experience history, natural beauty & hospitality 2. Enhance tourism development 3. Established a VIC 4. Support & develop cultural & related events 5. Much of the economic base of the region depends upon tourists 6. Maintain the Museum, historical assets & various monuments/memorials for education & enjoyment of residents/visitors. 7. Maintain presentation of roadside verges, open space areas, & parks. 8. Seek & obtain entrance fees from visitors—offset costs 9. Improve interpretive signage 10. Promote the Cyber Café to visitors & review its profitability & technology	**Provide opportunities for visitors to experience the history, natural beauty and hospitality of the region** **Enhance the tourism development in the region** **Established a visitor information centre** **Continue to support and develop cultural and related events**	**Much of the economic base of the Mataranka region depends upon tourists**	**Maintain the museum, historical assets and various monuments and memorials for the education and enjoyment of residents and visitors** **Maintain presentation of roadside verges, open space areas, and parks** **To seek and obtain entrance fees from visitors which would be placed towards offsetting the costs of maintenance and enhancement of the facility** **Improve interpretive signage** **Promote the Cyber Café to visitors and review its profitability and technology**

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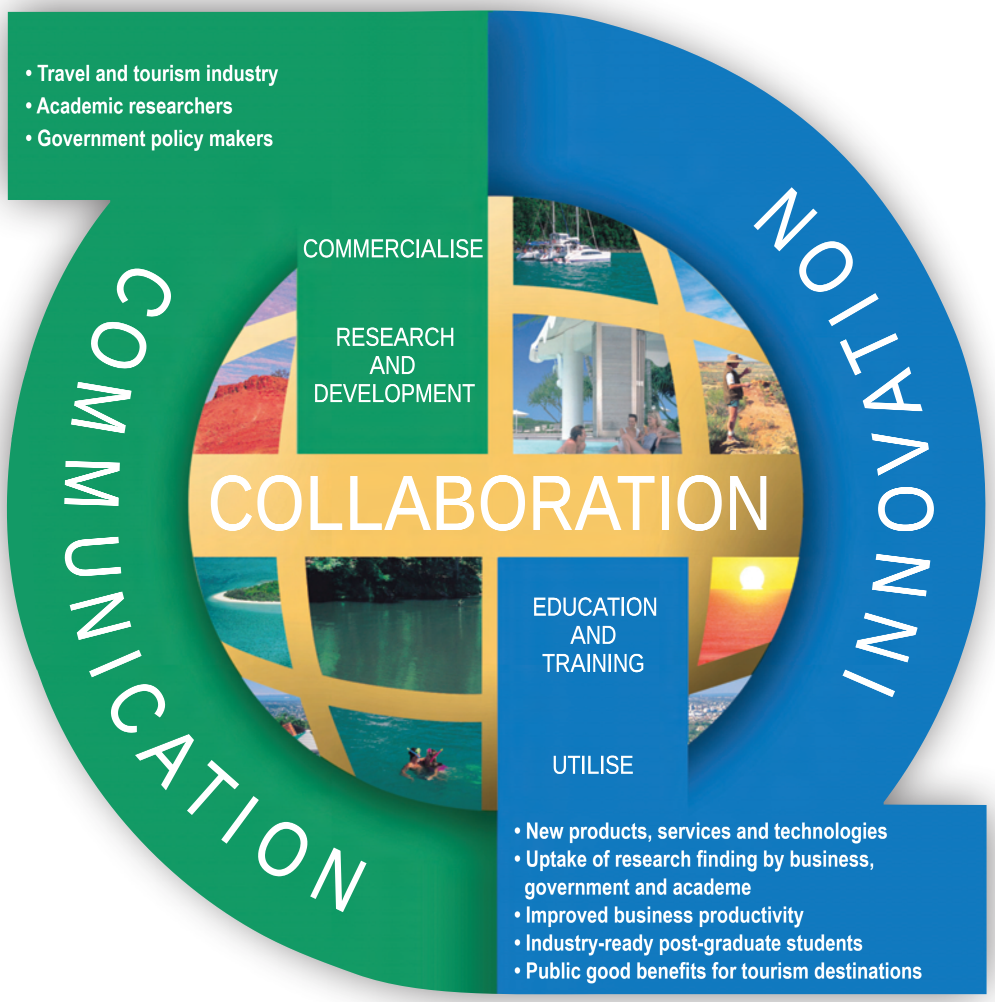

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SUSTAINABLE TOURISM CRC

The Sustainable Tourism Cooperative Research Centre (STCRC) is established under the Australian Government's Cooperative Research Centres Program. STCRC is the world's leading scientific institution delivering research to support the sustainability of travel and tourism – one of the world's largest and fastest growing industries.

Introduction

The STCRC has grown to be the largest, dedicated tourism research organisation in the world, with $187 million invested in tourism research programs, commercialisation and education since 1997.

The STCRC was established in July 2003 under the Commonwealth Government's CRC program and is an extension of the previous Tourism CRC, which operated from 1997 to 2003.

Role and responsibilities

The Commonwealth CRC program aims to turn research outcomes into successful new products, services and technologies. This enables Australian industries to be more efficient, productive and competitive.

The program emphasises collaboration between businesses and researchers to maximise the benefits of research through utilisation, commercialisation and technology transfer.

An education component focuses on producing graduates with skills relevant to industry needs.

STCRC's objectives are to enhance:

- the contribution of long-term scientific and technological research and innovation to Australia's sustainable economic and social development;
- the transfer of research outputs into outcomes of economic, environmental or social benefit to Australia;
- the value of graduate researchers to Australia;
- collaboration among researchers, between researchers and industry or other users; and efficiency in the use of intellectual and other research outcomes.