

# Tourism 2020

.....  
Whole of government working with industry to achieve Australia's tourism potential

## Tourism Research Advisory Board Meeting 1 March 2013

### **Summary of outcomes**

Discussions at the 13<sup>th</sup> meeting of the Tourism Research Advisory Board, held on 1 March 2013, focussed on a number of issues of significance for the tourism industry.

### ***Survey of Small-Scale Accommodation***

Following approval of funding by the Australian Standing Committee on Tourism (ASCOT), Tourism Research Australia (TRA) commissioned STR Global Limited (STR) to develop a small scale accommodation survey (SSAS) for smaller accommodation establishments. The purpose of this survey is to help fill the data void created when the Australian Bureau of Statistics (ABS) ceased collecting data on the performance of motels and hotels with less than 15 rooms, caravan parks and hostels.

Despite a major promotional campaign by TRA, industry associations and state and territory tourism organisations, registrations were below the March 2013 target of 2,000. The Advisory Board discussed the options for the SSAS including a proposal from Tourism Events Queensland agreeing that it would be premature to terminate the project. The Advisory Board is exploring ways to link to Tourism Exchange Australia and other automated systems to increase operator registrations.

### ***Changes to the Australian Bureau of Statistics (ABS) quarterly Survey of Tourist Accommodation (STA)***

The ABS undertakes a quarterly survey of hotels, motels and serviced apartments with fifteen or more rooms. The Advisory Board was made aware of the ABS's decision to discontinue the quarterly collection of the STA, moving it to an annual collection (due to the need to find savings within its budget). Advisory Board members expressed strong concern about the change and the impact that it would have on tracking industry performance and providing the information needed to make investment decisions.

Unless funds external to the ABS are found to cover the cost of continuing a quarterly STA collection, the ABS advised that the STA will become an annual collection from July 2013.

The Advisory Board will be reporting on both the SSAS and ABS STA at the April 2013 meeting of Tourism Ministers.

At its 13<sup>th</sup> meeting, the Advisory Board also:

- Noted the progress made by TRA in the review of the Tourism Forecasting Process.
- Agreed to the changes proposed by TRA to streamline the 2013 edition of the Tourism Investment Monitor to make it a more accessible document for industry and government.

- Noted that a new website is being developed for TRA which will reside on an external server. This will enable TRA to provide data in a more accessible manner to a wide audience. It is expected that the new site will go live in March 2013.

### ***Progressing the National Tourism Research Agenda (NTRA)***

The NTRA provides a framework for identifying and informing both current and future tourism research priorities and is a framework that supports the policy objectives of Tourism 2020. The Agenda seeks to build on the thorough understanding of tourism industry issues by minimising research gaps identified through Tourism 2020, particularly research and statistics on tourism supply. A review of the NTRA conducted by TRA on behalf of the Advisory Board that involved extensive consultation with industry, government and academe, identified six key themes and several sub-themes that are of particular interest to stakeholders in the tourism industry. (See Table 1 below)

***Table 1: Key themes in tourism research***

<b>Themes</b>	<b>Sub-themes</b>
Tourist	Trends in demographics, psychographics, behaviour** New markets Drivers of demand Dispersal**
Performance – Evaluation and assessment	Competitiveness** Productivity** Industrial relations** Economic value Operator benchmarking
Facilitation	Investment and regulatory reform Labour market issues** Taxation / subsidies** Transport** Industry structure
Tourism products	Distribution** Technological / digital** Innovation** Quality Events (methods to assess contribution)** Indigenous New tourism product categories
Risk / Resilience / Climate Change	
Dissemination of research outcomes **	

*\*\*Indicates the issues that were seen as important by many stakeholders*

While a number projects being undertaken by TRA, Tourism Australia and academe fall into the identified themes and sub-themes, a number of gaps remain. The Advisory Board prioritised these gaps and will scope and cost four research projects that could be undertaken by TRA for discussion at its June 2013 meeting. The four research projects relate to *competitiveness; labour market issues; taxation / subsidies; and, transport* (international passenger facilitation at airports).

For more information email [tourism.research@ret.gov.au](mailto:tourism.research@ret.gov.au) or see the Tourism Research Advisory Board page on the Tourism Ministers' area of [www.ret.gov.au](http://www.ret.gov.au)

Dr Leo Jago  
Chief Economist – Tourism  
General Manager – Tourism Research Australia