

NATIONAL TOURISM RESEARCH AGENDA

Progress at April 2011

Background

The Tourism Research Advisory Board (Advisory Board) oversees the development of the National Research Agenda. The Advisory Board is chaired by the Secretary of the Department of Resources, Energy and Tourism and includes representatives from: Tourism Research Australia (TRA), Tourism Australia, State Tourism Organisations, industry, unions and the academia sector.

The Advisory Board is reviewing demand-side and supply-side research priorities, with a specific focus on emerging markets; global competition; labour; and investment. Growth in productivity and innovation is regarded as necessary and the interaction between those issues and the abovementioned focus will be considered accordingly. This is being progressed by Tourism Research Australia in its capacity as Advisory Board secretariat.

National Research Agenda

The National Tourism Research Agenda (the Agenda) provides a framework for identifying and informing both current and future tourism research priorities. The Agenda has been developed as a framework that supports the policy objectives of the National Long-Term Tourism Strategy (Strategy) and its implementation to achieve the 2020 Industry Potential (Potential).

The Agenda seeks to build on the issue of understanding tourism industry issues by minimising research gaps identified in the Strategy and the Jackson Report, and seeks to engage the full spectrum of tourism-specific and industry-related research participants such as government, industry, and academic institutions.

Central to the Agenda is a project matrix (refer **Appendix A**) – a listing of current tourism research. The draft project matrix is currently populated with projects managed or undertaken by Strategy Working Groups and Tourism Research Australia (TRA). Note that it is proposed that the matrix intends to capture research beyond that which is currently underway to also include significant research undertaken by industry and the academic sector. This will allow for informed decision making against key research priorities whilst considering current and emerging research gaps.

The Agenda, in particular the development and maintenance of the underlying project matrix, is an investment by Australia's tourism industry in understanding research – recent, current, or prospective. Importantly, the project matrix is an evolving information system on tourism research providing information on who is doing what? What questions they seek to answer and why? Who is driving this research? How much will it cost? When will it be delivered?

Currently, the project matrix has identified projects by their dominant 'pillar' but this is a preliminary categorisation and many research projects listed cut across two or more of the four pillars. By detailing this information a dividend is provided to support policy, investment, and planning in a manner not previously available.

Consistent with the Strategy, the Agenda is overseen by the Tourism Ministers' Council; it includes all levels of government, Strategy Working Groups, state and regional tourism offices, industry associations, tertiary institutions and private enterprise (refer **Appendix B** for the National Tourism

Research Agenda relationship structure). As the secretariat of the Advisory Board, responsibilities for the Advisory Board, TRA is responsible for the maintenance of the project matrix. By encouraging a dialogue between Advisory Board members and their respective stakeholders on research issues and priorities it is expected that information will filter through to TRA to populate the project matrix to be published on the [Advisory Board's home page](http://www.ret.gov.au/tourism/tmc/workinggrps/research) (<http://www.ret.gov.au/tourism/tmc/workinggrps/research>).

An important objective of the Agenda is to provide a more inclusive and strategic research environment.

A detailed understanding of the research environment will assist in minimising research gaps by directing organisations to 'off the shelf' research and focusing research on addressing the objectives set out in the Strategy and 2020 Tourism Industry Potential.

It will also allow TMC to review the full suite of research available.

Research Agenda Project Matrix: Projects in progress as at March 2011

Background

This document was presented to the Tourism Research Advisory Board on 10 March 2011 and revised to reflect amendments to the projects provided by the Digital Distribution Working Group ahead of the ASCOT teleconference on 22 March 2011.

It provides a summary of the projects in progress at March 2011, by the National Long-Term Tourism Strategy Working Groups and research being undertaken by Tourism Research Australia (TRA).

- Destination Management Planning Working Group (Chaired by Tasmania)
- Digital Distribution Working Group (Chaired by New South Wales)
- Indigenous Tourism Working Group (Chaired by the Northern Territory)
- Industry Resilience Working Group (Chaired by Queensland)
- Investment and Regulatory Reform Working Group (Chaired by Victoria)
- Labour and Skills Working Group (Chaired by South Australia)
- Research Advisory Board (Chaired by the Commonwealth)
- Tourism Access Working Group (Chaired by the Commonwealth)
- Tourism Quality Council of Australia (Chaired by Mr Simon Currant, Independent Chair)

The research being undertaken by the Working Groups and TRA have been categorised against the research pillars identified in the draft National Tourism Research Agenda.

It should be noted this is a preliminary categorisation and that many research projects will cut across two or more of the four pillars.

National Tourism Research Agenda Pillar definitions (refer below for 'pillar' key)

Current market dynamics	Emerging trends	Building productive capacity	Dissemination pathways
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- Current market dynamics: current economic and competitive market environment facing the tourism industry.
- Emerging trends: identify and monitor the likely impact of long-term emerging issues that will impact on the tourism industry.
- Building productive capacity: sustainable productivity improvements to develop sustainable capacity and flexibility to allow industry to quickly respond to endogenous and exogenous challenges and opportunities.
- Dissemination pathways: develop an understanding of the available mechanisms to promulgate relevant tourism-related research and analysis to all points of the industry value chain.

**National Tourism Research Agenda: Research projects
in progress as at March 2011 (project summary sorted by main research pillar)**

Labour and Skills Working Group

Profile of tourism labour market by tourism regions

- A national survey to identify current levels of tourism and hospitality employment.
- Expected delivery May 2011 (tbc)
- ***Current market dynamics / Emerging trends***

Investment and Regulatory Reform Working Group

Determine whether tourism investment is disadvantaged by regulatory arrangements

- Will examine whether the tourism industry face disincentives for investment from the regulatory framework, and if it does, what reforms can be implemented to address the disincentives?
- Delivery May 2011
- ***Current market dynamics / Building productive capacity***

A framework guide to facilitate tourism investment

- Will seek to identify what current investment facilitation is undertaken for tourism in Australia; what models of best practice facilitation are available; and how can a framework guide to facilitate investment be most effectively applied in Australia?
- Delivery April 2011
- ***Current market dynamics / Building productive capacity***

Project audits for Barossa Valley and Great Ocean Road

- Product audit for: i) Barossa Valley; ii) Great Ocean Road.
- Final report July 2011
- ***Current market dynamics***

Destination Management Planning Working Group

Pilot Experience Development Strategy (EDS).

Two projects to consider the best practice approach of destination management planning across regional and urban areas and integrate the lessons in the development of best practice principles. Two consultants have been engaged to develop the EDS:

- Flinders Island
- Cairns/Townsville.
- ***Current market dynamics / Building productive capacity***

Tourism Access Group

Mapping Australia's Tourism Aviation Priorities

- i) To use to assist in air service negotiations and identify growth opportunities.
- Delivery end-May / mid-April
- ***Current market dynamics / Emerging trends***

Regional Airports Package project

- Report on the current communication processes and options to improve communication of the Enhanced Regional package to stakeholders. Investigate the level of understanding of the regional aviation packages and develop ways to better communicate the benefits of industry.
- Delivery end March / mid April
- ***Current market dynamics / Dissemination pathways***

Cruise data

- Evaluation of the economic impact of Australia's cruise shipping indicators through cruise ship passenger surveys.
- Delivery end April
- ***Current market dynamics / Productive capacity building / Dissemination pathways***

Industry Resilience Working Group

Economic impacts of project climate change trends on the tourism industry

- Provide a tool to build resilience to shocks and improve business strength.
- Delivered

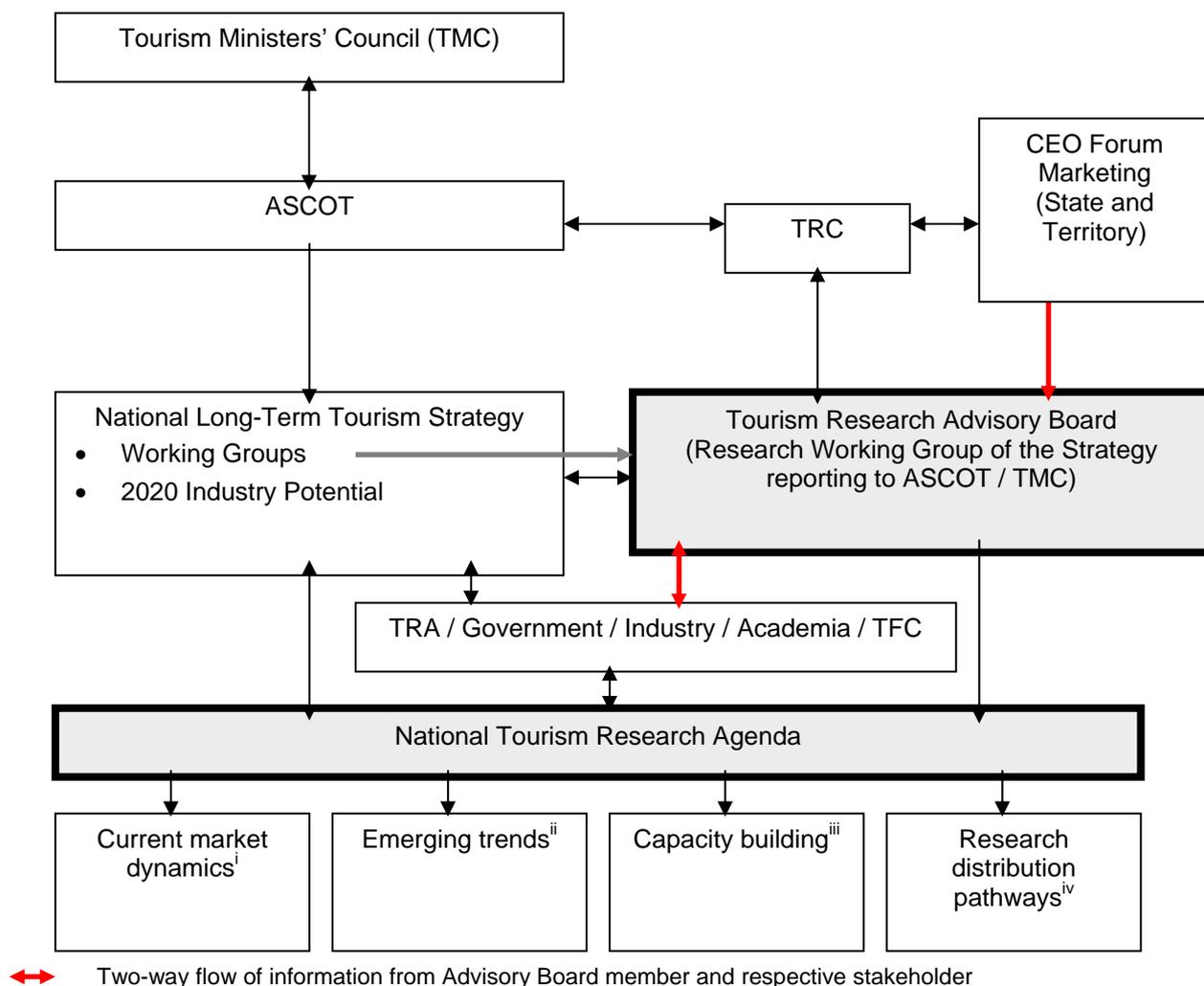
<ul style="list-style-type: none"> • <i>Emerging trends</i>
Indigenous Working Group
Nil research in 2010-11
Tourism Quality Council of Australia
<p><i>NTAF risk assessment</i></p> <ul style="list-style-type: none"> • Technical enhancements to Australian Tourism Data Warehouse (ATDW) to support National Tourism Accreditation Framework (NTAF) • Ongoing over two years • <i>Building productive capacity</i>
Digital Distribution Working Group
<p><i>Development of a National Online Strategy for Tourism.</i></p> <ul style="list-style-type: none"> • A governance framework and collaboration model for a National Online Strategy for Tourism, incorporating a Digital Distribution Action Plan for industry to enhance online product marketing and distribution. • Due April 2011. • A program of resources to improve industry's capability to become more proficient in digital marketing and distribution. • <i>Dissemination pathways</i>
<p><i>Tourism Operators Online Capabilities Benchmark Survey.</i></p> <ul style="list-style-type: none"> • A survey to test the Australian tourism industry's level of online presence and capability (which was stated in the Jackson Report and being around 30 per cent), and thereby establish a benchmark of the current position against which the Digital Distribution Working Group could measure its forward results. • Complete. • <i>Dissemination pathways</i>
Tourism Research Advisory Board
<p><i>2011 Tourism Directions Conference</i></p> <ul style="list-style-type: none"> • To bring to together industry, governments and researchers to discuss the outlook for the Australian tourism industry and progress with implementing the National Long-Term Tourism Strategy. • 13 October 2011 • <i>Dissemination pathways</i>
<p><i>2011 State of the Industry</i></p> <ul style="list-style-type: none"> • The report provides a detailed analysis of how Australian tourism is currently performing, the challenges it will face, and how the industry needs to respond. • early October 2011 • <i>Current market dynamics / Emerging trends / Productive capacity</i>
<p><i>Tourism Communication Pathways</i></p> <ul style="list-style-type: none"> • Understand how regional tourism organisations and tourism operators access and use research and strengthen understanding of the "dissemination" research pillar of the National Tourism Research Agenda Framework. • April 2011 • <i>Dissemination pathways</i>
<p><i>Medical tourism scoping study research</i></p> <ul style="list-style-type: none"> • To assess the viability of Australia as a tourist destination: i) stage 1 will investigate the potential demand for Australia as a medical tourism destination; and ii) stage 2 will estimate the potential economic benefits of medical tourism in Australia. • Tenders under consideration • <i>Emerging trends</i>

Department of Resources, Energy, and Tourism – consistent with Portfolio Budget Statement

Tourism Research Australia
<p>Tourism Research Australia (TRA) provides statistics, research and analysis to support industry development, policy development and marketing for the Australian tourism industry. TRA's work program may be defined by four core data and analytical streams:</p> <ul style="list-style-type: none"> • National surveys • Economic and industry analysis • Forecasting and economic modelling • Regional research
<p><u>National surveys</u> (management and production national surveys)</p>
<ul style="list-style-type: none"> • Surveys <ul style="list-style-type: none"> ○ International Visitor Survey (IVS). Delivery date: quarterly releases ○ National Visitor Survey (NVS): Delivery date: quarterly releases ○ Regional expenditure (REX); ○ modelling for Regional Expenditure (REX); ○ Total Inbound Economic Value (TIEV); ○ Total Domestic Economic Value (TDEV); • Current market dynamics
<p><u>Economic and industry analysis</u> (analysis and facilitation of industry research)</p>
<ul style="list-style-type: none"> • Tourism Research Advisory Board - supporting the Tourism Research Advisory Board which plays an active role in managing the National Tourism Research Agenda, by identifying research gaps and priorities important for the industry and policy development. • Current market dynamics / Emerging trends / Building productive capacity / Dissemination pathways
<ul style="list-style-type: none"> • Impact of a higher Australian dollar on tourism demand - Insights into the impact and importance of exchange rate movements on demand for Australian tourism industry services. This will be assessed from both a volume and value perspective. • Current market dynamics / Emerging trends
<ul style="list-style-type: none"> • Tourism's contribution to Australian economy, 1997-98 to 2009-10 - Tourism not only contributes directly (as captured by the TSA) to the Australian GDP, GVA and employment but its effect go much further in terms of increasing the use outputs and inputs produced by non-tourism industries resulting from the consumption of tourism related goods and services by visitors. Understanding the total contribution of tourism is crucial for the industry, government and the policy makers. Delivery date: April/May 2011 • Current market dynamics
<ul style="list-style-type: none"> • Tourism businesses in Australia – Tourism businesses are varied in nature and characteristics and are distinct from other conventional industries. TRA 2009 report indicated that tourism industry is comprised largely (95%) of non-employing and micro and small businesses. Understanding of size and spread of tourism related businesses at a regular interval is important. Delivery date: May/June 2011 • Current market dynamics
<ul style="list-style-type: none"> • Regional tourism employment – Tourism industry provides employment to more than half a million of people in Australia. The spread and extent of this employment in Australian tourism regions is however unknown. An understanding of the importance of tourism industry as a provider of employment is important for government and policy makers for making relevant policies. Delivery date: May/June 2011 • Current market dynamics
<ul style="list-style-type: none"> • Tourism investment in Australia – Increased investment is important for improving productivity and wellbeing of the tourism industry. Understanding the level and pattern of investment is crucial for the long term growth and sustainability of

<p>the tourism industry. Delivery date: March/April 2011</p> <ul style="list-style-type: none"> • Building productive capacity
<ul style="list-style-type: none"> • <i>Tourism Productivity in Australia</i> – Understanding productivity (i.e. labour, capital and multifactor productivity as compared to the market sector of the economy) is important for the long term sustainability of Australia's tourism industry. Delivered date: Released Jan 2011 • Building productive capacity
<p style="text-align: center;"><u><i>Forecasting and economic modelling</i></u> (management and production of industry forecasts and economic modelling)</p> <ul style="list-style-type: none"> • Tourism Forecasting Committee <ul style="list-style-type: none"> ○ Secretariat ○ Stage 2 of consultation on the proposed changes to the TFC Forecast publications, after May 2011 ○ <i>Development of Forecast 2011: TRA (TFC), Issue 1</i> proposed for release in May 2011, <i>Forecast Issue 2, 2011</i> on 13 October 2011. • Emerging trends / Building productive capacity
<ul style="list-style-type: none"> • Economic modelling: <ul style="list-style-type: none"> ○ Oversight of the State Tourism Satellite Accounts (for years 2008-09 and 2009-10) ○ Oversight of Computable General Equilibrium (CGE) modelling projects (2010-11): <ul style="list-style-type: none"> ▪ Passenger Movement Charge ▪ Return on Investment ▪ Scoping study of tourism employment data • <i>Emerging trends / Building productive capacity</i>
<p style="text-align: center;"><u><i>Regional Research</i></u> (undertakes tourism research at the local or regional level)</p> <ul style="list-style-type: none"> • <i>Project outputs through the Destination Visitor Survey (DVS) Program</i> - a Commonwealth Government funded program that began in 2004-05 developed with the broad objective of providing tourism destinations, at the local or regional level, with tourism research to support their information needs and business decision making. • <i>Current market dynamics</i>
<ul style="list-style-type: none"> • <i>The Economic Importance of Tourism to Australia's Regions</i> – Analysis of the economic importance of tourism across each tourism region in Australia is estimated by comparing the value of each region's tourism industry to its local economy. Regions are ranked by the relative importance of tourism to their local economies and comparisons are made between tourism industry size and importance. TRA, April 2011 • <i>Current market dynamics</i>
<ul style="list-style-type: none"> • <i>Regional Tourism Profiles</i> – regional-level data from a range of sources including TRA's International and National Visitor Surveys, TRA's modelled regional expenditure estimates, TRA's estimates for the number of tourism businesses; the ABS Survey of Tourist Accommodation, and modelled economic contribution data from the State Tourism Satellite Accounts produced by the STCRC. TRA, January 2011 • <i>Current market dynamics</i>
<ul style="list-style-type: none"> • <i>Regional Expenditure</i> - As TRA's IVS and NVS do not collect expenditure data below the trip level, TRA model regional and state/territory expenditure estimates. TRA, top line estimates - Once a quarter with the IVS and NVS publications, Comprehensive estimates: End of 2010/11 • <i>Current market dynamics</i>

National Tourism Research Agenda: structure and research pillars



- i. Understand the current economic and competitive market environment facing the tourism industry through research in areas such as productivity, the labour market, investment and regulation, innovation, consumer preferences, competitor analysis, quality assurance, and distribution systems.
- ii. Through research in demographic trends, climate change, and geo-political changes, identify and monitor the likely impact of long- term emerging issues that will impact on the tourism industry.
- iii. Research in areas such as industry productivity to enable sustainable capacity increases and flexibility. This will include examining how current market dynamics and emerging trends affect the tourism industry’s responses to challenges.
- iv. Develop an understanding of the available mechanisms to promulgate relevant tourism related research and analysis to all points of the industry value chain.