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**Future trends:** What do you see as the future trends which will shape and change the industry over the next 10 years?

**Please provide your response :** The exponential increase of visitors from the Asian region is set to shape and change the tourism industry over the next decade.

China is already Australia's most valuable tourism market and most significant source market, overtaking New Zealand in 2018. This number is expected to almost triple by 2026-27 with Tourism Research Australia (TRA) predicting the number of visitors to reach 3.9 million. A growing middle class increased air capacity and eased visa restrictions have led to an increased number of visitors over the past decade. Moreover, the types of traveller profile are changing. Other Asian markets continue to grow as well, with key source market, India, growing at 20% year-on-year according to Tourism Australia. The industry needs to invest in understanding the behaviours, consumer patterns and core motivation factors of these travellers. How the industry attracts, captures and adapts to a changing source market mix and traveller profile will be key to its ongoing success.

**Regional dispersal:** Given that growth in tourism beyond 2020 will mainly come from inbound visitors, particularly those from the Asian region, how can we achieve greater dispersal into our regions for longer periods of time? Should there be specific targets set for international visitation to regional Australia?

**Please provide your response :** Focusing on Australia's most valuable tourism market, the Chinese traveller; according to Tourism Research Australia (TRA), Chinese Free and Independent Travelers (FIT)s have increased their dispersal beyond the key major cities and tourism destinations by just 5% (22-28%) over the last ten years. However, many of these trips are day trips that leave from major metropolitan cities.

There are many elements that the regional tourism industry can control. An understanding of key market drivers and cultural expectations are required. They also need to have suitable products and services to ensure it's the right fit as well as offer suitable payment options (such as UnionPay and Alipay/WeChat Pay for Chinese travellers). Moreover, they need to be attracting visitors by telling their story via social media and digital travel platforms and also have the building blocks in place for visitors to tell their story via user-generated content and key word-of-mouth platforms.

**Data:** What role do you see data analytics and segmentation playing now and into the future?

**Please provide your response :**

**Technology:** What technological advances do you think will shape the sector over the next 10 years? What legislative and regulatory amendments are needed to better facilitate the adoption of new technology to meet the diverse needs of the future traveller?

**Please provide your response :**

**Indigenous tourism:** How can industry and Australian and state and territory governments better coordinate and support the development and continuation of Indigenous tourism businesses, experiences and offerings on a national basis?

**Please provide your response :**

**Infrastructure/seasonality:** What kind of tourism infrastructure investment should be prioritised to encourage all-year-round visitation to Australian tourism icons affected by seasonality?

**Please provide your response :**

**Employment:** How can the tourism industry improve career perceptions and create career pathways to attract new workers into the industry?

**Please provide your response :**

**Australian expertise:** Looking beyond tourism demand and supply, how can the next long term strategy seek to leverage the export capability of Australian tourism businesses?

**Please provide your response :** Asialink Business has sought to lead the way in this space by piloting an Australian-first program ‘China Host’, a tourism leadership program that provides businesses with the tools, knowledge and key contents needed to drive inbound tourism into regional markets. It is delivered as a combination of practical workshops, visits from industry experts, site visits and networking activities for participants.

The program is delivered in partnership with peak bodies, local councils, state-government partnerships, public and private education and training organisations.

Through these events, activities and training, Asialink Business has created 15 regional champions who are setting the standard in terms of service level expectations and offering the best experience to Chinese visitors.

**Aviation:** What are the missing links in Australia’s aviation network, including ‘secondary’ international hubs and domestic regional locations?

**Please provide your response :**

**Social licence:** How do we better message the social and economic benefits of the tourism industry to the Australian community to ensure ongoing social licence to operate?

**Please provide your response :**

**Resilience:** How can the Australian tourism industry ensure it is resilient to the impact of global shocks beyond 2020 (economic, political and environmental)?

**Please provide your response :**

**Title:** What is the appropriate title for the strategy?

**Please provide your response :**

**General:** Any other comments

**Please provide your response :**

As the only dedicated centre of excellence for Asia business capabilities in Australia and globally, Asialink Business is uniquely positioned to understand the capabilities required for Australian tourism businesses to leverage the export opportunities available, as well as the challenges and complexities for business, especially SMEs, in developing Asia capabilities and access the opportunities.

Looking beyond tourism demand and supply, Asialink Business recommends the following to be incorporated in the next long-term strategy seek to leverage the export capability of Australian tourism businesses.

1. Consider ways to build-in and better integrate Asia capability training into export capability development and funding.

For example; consider how to integrate existing Asia capability programs into trade missions and international expos, with a holistic ‘whole of export journey’ approach spanning the spectrum of knowledge acquisition, awareness and capability/action.

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Updated 22 February 2019

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1. I am authorised to provide this submission on behalf of the abovenamed organisation;
2. Our organisation maintains business ethics and fulfils its legal obligations, including those arising from anti-bribery laws in Australia and overseas;

3. Our organisation warrants that all the information and content provided herein is true and correct and there is no breach of confidentiality in disclosing this information to Austrade;
4. Our organisation consents to Austrade storing, using and publishing the information submitted in this form as part of any marketing material related to the Initiative, and agrees to it being translated and distributed nationally and internationally;
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