

SUBMISSION NO 24 R – rec'd 8.03.19 - Australian Services Roundtable

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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 : ASR has recently conducted workshops into the export of health services tourism.

The current market is worth US\$100bn with growth of 25% year-on-year for the next 10 years. The US market in 'health tourism' could reach US\$3 trillion by 2025.

- In 2017 estimated 1.4 million Americans travelled abroad for health purposes
- Approx 16 million international patients worldwide.

Asia-Pacific region is also showing strong growth and breaking the 'cosmetic surgery' stereotype. Australia does not rank either in APAC or globally as far as health tourism is concerned.

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 : There is untapped potential for health service provision in regional Australia, taking into account the need to build infrastructure and provide a skilled workforce. The 2009 Cairns Declaration stated that a key aim of the development of this sector is to provide a conduit to regional

dispersal and investment.

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

Please provide your response : The data base for health services exports is very poor and would need to be built in order to establish a viable sector in Australia. This includes:

- Lack of organisational experience in aspects of service delivery in the international healthcare sector
- Complex health regime (federal, state, local)
- Lack of focus: International elements not wholly connected

- Limited knowledge of market demand/ client expectations
- Uncertainty regarding sources of funding
- No strong buy-in from government
- Lack of public awareness: no coordinated advocacy
- Poor data

More industry analysis is needed as the 2011 Deloitte study into this topic has become dated.

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 :

The health and wellness tourism sector is part of a 'whole-of lifecycle' offering of personal services to overseas visitors, including education and leisure services. It is thus less 'seasonal' than other kinds of tourism. The 2009 Cairns Declaration noted that:

- Health and Wellness tourism covers a broad spectrum of activity ranging from leading-edge medical procedures to health resorts, each with their own regulatory standards and requirements.

- Health and Wellness tourism, involving the holistic wellbeing of mind, spirit and body in tune with the environment, is the ultimate life-style/cycle travel activity.

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 :

Australia could be competitive in the global health tourism market because of our expertise and the high quality and reliability of our health system. This is especially important for consumers from the

US market.

We therefore see the next step as being the establishment of a a joint Government/Industry working party to develop a framework for research into and development of a health export industry, and a regulatory framework for the sector.

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 : A strong regulatory framework, led by industry and developed in partnership with government - DFAT, Austrade, Department of Health, state governments etc. - will be important for any social license for health services export. We also recommend a pilot programme of famils from the US market, in concert with the Federal Government. Care must be taken to avoid sensitivities about overloaded health infrastructure. Instead, health services exports can take advantage of unused or intermittently-used capacity in the health system, especially for specialised services or technology.

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 : Health and wellness tourism is one of the fastest-expanding sectors of travel in the world today. The 2009 Cairns declaration urged the Australian government and tourism industry to think holistically, seeking opportunities both to increase Australia's standing as a destination for health tourists but also to meet Australia's own domestic health needs.

ASR recommends that:

That the Federal Government establish a joint Government/Industry working party to develop:

1. A market concept for health and wellness tourism.
2. A framework for research into and development of a health export industry.

3. A regulatory framework for the sector.

We also recommend that:

1. The Federal Government contributes to a pilot program of famils from the US Market.

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Updated 22 February 2019

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