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

- An increase in tourists to Australia especially from the Asian market.
- An increased demand for eco products and a shift in travel preferences to carbon neutral travel.
- An increasing trend to link nature with wellness
- Seeking destinations that aren’t seen as ‘over tourism’.
- An ever increasing need to engage with communities to gain social licence

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?

A key to regional dispersal is creating a business environment where ecotourism and nature-based tourism can thrive. National, State and Local Government policies can be adapted, at little or no cost, to encourage high quality ecotourism experiences and practices.

Suggested actions:

- National and State governments to introduce comprehensive policies that reward high-quality tour operations with incentives from all arms of government (i.e. not just Protected Area Management Agencies)
- Local councils to develop destination management plans that feature ecotourism and nature-based opportunities
- Local councils to develop uniform planning guidelines on nature based and ecotourism development
- Local councils and RTOs to attain Ecotourism Destination Certification

Ecotourism Australia Member Responses:

- Several responses presented the common idea of a consistent marketing message presented across all Australian tourism marketing channels similar to the 100% pure NZ campaign.
• A coordinated effort on a national marketing campaign to promote different destinations throughout the year to match seasonal highs and lows. As well as promoting greater regional areas in marketing messages instead of focusing on just the famous attractions.
• Policies to include renewed shoulder season marketing approaches promoting topical and outback destinations.
• Government agencies to take on more roles in the online booking sector to increase operator profits from the reduced online booking commissions and promote small destination areas for greater tourist dispersal.

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

Data allows us to better understand and predict traveller demand and trends. Businesses and destinations that understand how to analyse and use data will perform better, and so will those that are flexible and quick to implement new strategies.

The increased pressure on businesses to adapt to new trends quicker may jeopardise the research and considerations of the impacts of tourism activities.

Although data is supposed to help decision-making, the high amount of everchanging data could become hard to process and an addiction to data analytics could generate more questions than answers. Being too data-driven could become a barrier to react promptly to important issues.

The questions around data privacy and security will increase in the future. As we increasingly rely on data, the risk of losing the access to it (e.g. new legislations to protect privacy, protect against cyber-attacks) augments too.

**Suggested actions:**

• Develop augmented analytics tools or platform that focus only on relevant and actionable findings rather than publishing a large and hard-to-process amount of data to help businesses and destinations that don’t have the time or resources for in-depth data analytics
• Have a flexible and agile approach when solving issues emerging at a destination to keep up with the fast pace of the industry adapting quicker to new trends.
• Increase the focus on providing accessible (free) analysis

**Ecotourism Australia Member Responses:**

• Several respondents expressed wishes that tourism monitoring bodies, provide access and education of data analytics to small operators so they can understand current trends, adapt their businesses and provide evidence to their needs when applying for funding or seeking stakeholder approval. As small operators and small destinations feel that possibly valuable information is lost in the bureaucracy of government tourism bodies.
• New methods of data collection will help understand tourism trends and assist in targeting relevant segments.
• More coordinated tourism management products and tools such as Australian Tourism Data Warehouse will arise.
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 traveler?

Travellers will have access to more information than ever. With more competition from online publishers, social media and user-generated content, it will be increasingly challenging for tourism operators and destinations to stay the main source of information about tourism products and manage visitors’ expectations.

The increase use of artificial intelligence, robotics and automation will increase efficiency and reduce labour costs. As a result, there will be fewer human interactions during the research booking stage.

Visitors will have access to tools (e.g. automatic translation, self-driven cars) that will give them more flexibility. These technologies could impact their travel planning behaviour as they will be able to make or change plans more easily at the last minute.

Travellers will use crypto or digital currency for holiday bookings and international payments as it provides many benefits (e.g. reducing the need for currency exchange, international exchange rates, risk of credit card fraud, etc.)

Suggested actions:

- Improve telecommunications services to regional and rural areas and invest in Internet communications infrastructures in Australia to be ready to upgrade to new technologies.
- Assist tourism business owners to up-skill and learn about the new technologies and opportunities that arise with free development programs and workshops (e.g. Digital Ready)
- Accelerate the affordability of green technologies that reduce the negative impacts of tourism (e.g. emission-free transport using renewable energy) with support and grants for innovative tourism businesses that are ready to invest in energy efficiency and low emissions technologies.
- Encourage cross-sectoral collaborations (e.g. with financial institutions, with transport/vehicle providers) to ease the implementation of emerging technologies
- Embrace opportunities created by augmented reality technologies to provide new and enriched experiences to visitors, particularly in interpretation and education

Ecotourism Australia Member Responses:

- Using mobile technologies such as augmented reality to provide learning experiences.
- Information technologies being used to enhance tourism products and ease of travel. Booking services will allow tourists to purchase their whole holiday on their phone and use virtual tickets to board planes, check in at hotels and access their hotel rooms without human interaction.
- New climate measuring technologies used in the planning of tourist’s trips and destination management.
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?

Suggested actions:

- National adoption of the 2012 Larrakia Declaration on the Development of Indigenous Tourism
- Better understanding of the diversity and identity of Aboriginal peoples and ensuring Aboriginal people to work on their own country – not any country.
- Understanding of different measures of success – financial, job creation and pride through sharing stories
- National business mentoring service

Ecotourism Australia Member Responses:

- Support and recognition to Indigenous operated and owned tourism products to enhance indigenous tourism and leverage the unique selling point of the rich indigenous connection and history with country.
- Indigenous people in tourism, incentives for hiring indigenous people or incorporating indigenous interpretation into cruises.
- Promote consultation with indigenous communities to ensure their views and needs are included in tourism planning.

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

Developing seasonally based tourism product is a key way of encouraging all year visitation. Product based on what the season offers, not just the same product but at an inappropriate time, allows for new markets to develop. An example is mountain biking in summer along snow downhill tracks. Just building infrastructure won’t be enough.

Suggested actions:

- Deliver product development workshops in seasonally based tourism destinations to explore ‘out of season’ opportunities.
- Research key international market demand for new tourism product – product that may suit low season destinations and activities
- Develop off season festivals and events.

Ecotourism Australia Member Responses:

- The need for more flights inland and travel infrastructure as current supply elasticity is inadequate during high travel periods.
- Visitors expect cell service throughout their travel, this is not always accessible in regional Australia, the development of better mobile phone reception infrastructure is necessary to make Australia more attractive.
- Government funding needs to focus less on the marketing of tourism and more on the development of tourism, especially in the central Australian area where marketing
campaigns often focus on Australian wildlife and cultural experiences but often lack the infrastructure and facilities to provide the experience tourists are looking for.

- Developing more infrastructure and higher quality accommodation to match Chinese visitor needs in the outback to promote tourism in the shoulder season.
- Increase Asian translation services and ensure adequate facilities are in place to cater for the Asian market’s expectations.

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

Tourism work is seen as transitory and something you do before you get a real job. It lacks status, respect and clearly defined career pathways. A lot of work has been effective at the high-end restaurants where the rise of celebrity chefs has bought some glamour and prestige, but other sectors haven’t had the same success.

In nature-based tourism many companies are small and seasonally based making it difficult to provide fulltime, well rewarded careers. Creating a system where highly skilled customer facing staff can be provided with ongoing, reliable and rewarded employment is critical.

Creating relationships between seasonally based tour operators where key staff can move between the sites is a key. Senior guides, front of house staff, etc. could be contracted to move three months of the year (without losing their main jobs) to destinations with opposite high seasons.

**Suggested actions:**

- Create flexible work place agreements whereby staff can retain entitlements and position with one employer whilst moving to another employer during low season

**Ecotourism Australia Member Responses:**

- Promoting tertiary/higher education in the tourism sector can promote better quality tourism products and improve current tourism standards.
- On the subject of attracting new employees into tourism-oriented career pathways many of the responses emphasized the casual nature of employment in small tourism businesses, suggestions of higher pay rates, tax concessions on accommodation, and accessible training were mentioned to retain long term employees within the field.

**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?*

Australia possesses world class intellectual property in many tourism fields that could be effectively exported. The challenge for the exports of IP is it’s a ‘long game’ and requires expertise in IP protection. Many owners of Australian IP don’t have the time or resources to get the right advice, protection and willingness (or ability) to wait the time it takes for these projects to gain momentum.

**Suggested actions:**

- Austrade grant program and support for tourism IP export
- Austrade to act as a broker for tourism IP in the export market

**Ecotourism Australia Member Responses:**
• There needs to be far more support provided to small tour operators by way of collaborative marketing and trade show engagement.
• 80% of Australian Tourism businesses are small to medium enterprises and the current export system does not cater for that at all. Breaking apart the system to set up an export website/trade site that specifically caters to SME’s will significantly increase their ability to attract overseas trade.

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

The key challenges are cost and lack of direct routes. Even busy regional flights such as Brisbane – Cairns return normally cost well over $600 which means it’s often cheaper for Australians to fly overseas. Often regional destinations require ‘hops’ slowing arrivals.

Ecotourism Australia Member Responses:
- Domestic airports should cater to larger aircraft to ease congestion on popular domestic flights.
- Create demand for smaller destinations through good planning and cater to the travel demand.
- The missing links in Australian aviation services can be shed home to lack of elasticity during high seasons. For example, flights to peak destinations such as the Red Centre must be booked many months in advance to secure seats because the airlines by and large do not make additional flights available to cater for high demand.
- The Asian market takes into account the flight time from home to destination. Most international flights go through Brisbane/Sydney/Melbourne. Routing these flights through Cairns or Darwin would shorten the initial flight time and make travel to Australia more attractive from the Asian markets’ perspective.

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?

The issue of social licence is complex and requires a nuanced response. There needs to be policy development and methods established to link the rewards of tourism that provide community benefit – not just profit to owners. Making the community advocates of tourism activities and tourism projects by ensuring the broader community sees them as adding value to their quality of life

Suggested actions:
- Develop measurement tools that tourism, communities and governments can use to measure the full impact of tourism activities, projects and infrastructure.
- Local governments to develop sustainable tourism plans.
- Communicate the benefits created by tourism to communities
Ecotourism Australia Member Responses:

- Government planning bodies and tourism developers need to increase communication with local communities. Multiple responses emphasized the need for tourism operators and organizations to listen to the communities they operate in, to ensure that tourism is developed sustainably, and the benefits are well communicated.
- Small destinations need to be well managed to ensure that over tourism does not harm the local culture and environment that makes the destination attractive in the first place.
- Main aim of increasing tourism is to raise liveability / quality of life in communities across Australia, jobs and economic growth helps but this is only one-way tourism contributes. Intangible tourism benefits also need to be communicated.
- Ensure there are long term commitment goals of tourism in Australia and successfully communicate these positive actions.

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

The reality of climate change impacts needs to be addressed. Visitors, especially international visitors, expect the tourism industry to be actively addressing and reducing its impact.

Suggested actions:

- Encourage individual companies to measure their carbon usage and develop mitigation and offset strategies
- Reward LTOs and RTOs who develop and market “low carbon” or “carbon neutral” holidays
- Develop State-wide and national tourism carbon mitigation strategies – similar to Queensland

Ecotourism Australia Member Responses:

- Tourism operators and destination management organizations should create resilience strategies and recovery plans to address negative impacts from climate change and volatile economic environments.
- Strong climate policies and carbon pricing are needed. If Australia is seen as a climate laggard, it will damage our national brand and could impact tourism.

Title: What is the appropriate title for the strategy?

- The current title is confusing.
- Ideas Tourism Beyond 2020,
- Tourism 2030 and beyond.
- Australian Tourism Beyond 2020.
- Visit Australia's Scenic Areas' or words to that effect!
Ecotourism Australia Member Responses:

- In our opinion, Australian tourism agencies spend far too much money on marketing tourism and ignoring the need for product development, particularly in areas of emerging market needs. Too often is the case that Australia attracts new visitors to our shore who go home disappointed and do not return. A classic example of this is TA's constant marketing of unique Australian wildlife but in reality, e.g. the Red Centre, the industry just doesn't make the experiences available. Lack of product development lost Australia the Japanese market some 25 years ago, and we are at a risk of not realising the full potential of the Chinese market, given that our competitors in the Region offer seriously good product developed through both government and private sector investment. We should also not lose sight of the fact that Australia is still regarded as a high cost destination, irrespective or not of the value of the Australian dollar. At the macro level, current Australian disinterest in participating in the UNESCO Global Geopark program or offering a similar product e.g. the Australian National Landscape program, does not auger well for strong growth in this sector. TA often boasts about its achievements in attracting some 8 million visitors annually, but we need to recognise that a country with whom Australia is often compared i.e. Canada already attracts 23 million visitors annually - yes it be argued that Canada sits alongside the USA market, but Australia lies within the reach of the largest tourism market globally. The challenge of our industry is to put the place the right strategies that include marketing, technology development, strategic alliances, investment attraction and trade development.
- Visas for the Asian market also need to be looked at to simplify processes and still maintain border security.
- OTA's leach 10%+ revenue from the Australian tourism industry and actually stifle unique product start-ups. Australian Governments should build a best practice website and social media platform and provide it free. Don’t let the NSW experiment with Hotels Combined ever happen again – they took a brilliant platform that supported small unique operators in their start-up phase and flushed it down an American toilet. Never again, please. This is where analytics tells you so much about what works and what does not.