

National Long-Term Tourism Strategy — Tourism 2020 2009 to 2011

The Australian tourism industry is undergoing structural adjustment. It is a labour intensive industry with a relatively high cost base, facing increasing levels of global competition. The higher Australian dollar, increasing demand for labour from the mining sector and more intense competition from lower cost destinations represent significant challenges facing the industry. At the same time the emergence of Asia as an economic powerhouse offers great opportunities for Australian inbound tourism.

In this environment of great challenges and opportunities a business as usual approach no longer works. The tourism industry needs greater investment, better quality product, less red tape, more productive firms and a larger, better skilled labour force. Since 2009, the National Long-Term Tourism Strategy — Tourism 2020 (the Strategy) has provided a framework for industry and government to work together to address supply side and structural issues that will help the industry meet the challenges and realise its full potential.

In the initial phase, much of the work involved taking the time to listen to industry, conduct research and gather the evidence needed to support key reforms. This includes a comprehensive profiling of the Australian labour force, a detailed analysis of barriers to tourism investment, product gap audits in two iconic tourism areas, audits of government business programs, climate change adaptation programs and Indigenous business development programs and a mapping of Australia's aviation access priorities.

Capitalising on this investigative work, the initial phase of the Strategy delivered practical outcomes for industry, such as:

- providing almost \$10 million for hotels to invest in more energy efficient buildings by extending Green Building Program to hotels;
- making it easier for firms to find labour for hard to fill seasonal jobs by including tourism in the Pacific Seasonal Worker Pilot Program and introducing more flexible working arrangements for overseas students;
- launching the National Online Strategy for Tourism to improve the online capability of tourism businesses and help them make more of their product available online;
- rolling out the T-QUAL Accreditation scheme to industry and consumers;
- agreement to remove restaurant and cafes from component pricing rules and saving hospitality businesses \$22 million a year; and
- offering \$8.5 million to 117 projects under the *T-QUAL Grants* program.

The second phase of the strategy will be delivered through Tourism 2020. Tourism 2020 seeks to deliver results for tourism businesses by integrating the reform agenda of the NLTTTS with the growth aspirations of the 2020 Tourism Industry Potential, which is to double overnight visitor expenditure to \$140 billion by 2020. Key areas include:

- increasing tourism investment by cutting red tape – all governments have agreed to progressing six priority regulatory reforms;
- addressing labour shortages by extending the Seasonal Workers Program to tourism to make it easier for regional tourism firms to fill seasonal vacancies;
- addressing local labour and skills issues by developing Tourism Employment Plans in each state and territory;
- increasing international air capacity to Australia by expanding aviation access entitlements in priority markets;
- opening of 2012 Round of *T-QUAL Grants — Tourism Quality Projects*;
- improving the quality of Australian tourism by encouraging increased participation in T-QUAL Accreditation and the subsequent use of the T-QUAL Tick as a recognisable symbol of quality;
- developing an Investment Monitor to benchmark the level of investment in Australia's main tourism-related sectors, including accommodation, transport and arts and recreation;
- increasing industry resilience by providing tourism firms with an industry resilience toolkit to respond to external market shocks; and
- supporting the growth of regional tourism by developing a destination management guide.

NATIONAL LONG-TERM TOURISM STRATEGY — TOURISM 2020

OVERVIEW OF ACHIEVEMENTS 2009–2011

Labour and Skills Working Group	Investment and Regulatory Reform Working Group	Destination Management Planning Working Group (now closed)	Tourism Access Working Group	Industry Resilience Working Group	Tourism Quality Council of Australia	Indigenous Tourism Working Group	Digital Distribution Working Group	Tourism Research Advisory Board
Key achievements	Key achievements	Key achievements	Key achievements	Key achievements	Key achievements	Key achievements	Key achievements	Key achievements
<ul style="list-style-type: none"> • Review of the transferability and recognition of qualifications across jurisdictions • MOU across Australian jurisdictions supporting measures to increase flexibility with interstate labour mobility • The largest ever report profiling the Australian tourism labour force and identifying the areas requiring labour market programs or actions to address • Extension of Pacific Seasonal Worker Pilot Scheme to tourism to help meet labour demand and alleviate seasonal labour shortages • More flexible working arrangements for overseas students to help alleviate tourism labour shortages 	<ul style="list-style-type: none"> • Work on investment incentives and facilitation with recommendations for action by jurisdictions to address these issues • Review of taxation issues including GST impacts and depreciation schedules • Extension of Enterprise Connect to tourism businesses allowing them to benefit from free business advisory services • Extension of the Green building fund to hotels • National Tourism Planning Guide to help improve development application processes and project facilitation • Exempting restaurant and cafes from component pricing rules, saving millions in compliance • Agreement by all state and territory tourism Ministers to progress six priority regulatory reforms including reviews of land zoning 	<ul style="list-style-type: none"> • Two Experience Development Strategy (EDS) projects completed for Flinders and Townsville/Cairns that demonstrate a new approach to tourism development with planning focus at destination level • Product gap audits for the Great Ocean Road and Barossa Valley to identify opportunities for product development • Best practice destination management planning workshop held with learnings from EDS and product gap audits available for investor and regional development consideration 	<ul style="list-style-type: none"> • Mapping of Australia's tourism aviation priorities to identify core growth markets and inform bilateral aviation negotiations • Input to aviation negotiations resulting in increased capacity in key markets, e.g. China • Development and dissemination of information explaining the regional aviation access packages and the potential benefits to airlines of servicing regional destinations • Economic modelling highlighting the potential benefits to the tourism from harmonising travel arrangements with New Zealand 	<ul style="list-style-type: none"> • Review and implementation of improvements to the National Tourism Incident Communication Plan providing more effective and consistent messaging on minimisation from market shocks to the tourism industry • Climate change adaption tool in development for future implementation with Regional Tourism Organisation and tourism businesses • Factsheet informing tourism businesses about programs assisting small businesses to adapt to climate change 	<ul style="list-style-type: none"> • Development of a National Tourism Accreditation Framework to help lift tourism product quality • Launch of T-QUAL Tick to industry and consumers resulting in a recognisable national symbol of quality for operators and providing greater confidence in product quality to consumers • Expansion and implementation of T-QUAL Accreditation to large tourism organisations • Electronic sub-license to increase the uptake of T-QUAL Accreditation by accredited operators 	<ul style="list-style-type: none"> • Factsheet informing Queensland's Indigenous Employment Program demonstrates a collaborative approach to Indigenous employment in the tourism industry • Input to several major initiatives, eg Ayres Rock Resort National Indigenous Tourism and Hospitality Academy 	<ul style="list-style-type: none"> • Launch of the National Online Strategy for Tourism (NOST) with a Going Global Action Plan to generate improvement to the online capability of tourism businesses • Online Capability Survey providing an establish benchmark of the online capability across the tourism industry and measurement references for ongoing improvement development and delivery to consumer markets 	<ul style="list-style-type: none"> • Industry-focused National Tourism Research agenda • State of the Industry reports in 2010 and 2011 to better inform decision makers in industry and government • Tourism Directions Conferences in 2010- and 2011, the pre-eminent forum to discuss and debate issues impacting on tourism • Alignment of the State of the Industry report to Tourism 2020 strategic areas • A new version of the expanded tourist accommodation survey providing additional data on tourism accommodation to industry and government