



NATIONAL LONG-TERM TOURISM STRATEGY WORK PLAN

NATIONAL LONG-TERM TOURISM STRATEGY – DECEMBER 2009

STRATEGY WORK PLAN

On 30 October 2009, the Tourism Ministers' Council (TMC) endorsed the National Long-Term Tourism Strategy (the Strategy), which incorporates recommendations from the Jackson Report covering tourism priorities such as addressing regulatory impediments, skills and labour shortages, investment, infrastructure, planning and indigenous tourism, climate change implications, research and marketing.

The Strategy establishes the framework and principles for ensuring that the tourism industry is a competitive and sustainable industry into the future. The principles respond to the key structural issues that are confronting the tourism industry and, if not addressed, will continue to impede industry growth.

The Work Plan translates the principles into action. In doing so, the proposed activities have been grouped together into key themes, each describing a single body of work which addresses the principles underlying the Strategy. The key themes of the Work Plan are:

Leadership: that is strategic, coordinated and capable of driving the implementation of the Strategy.

TMC has agreed to lead the implementation of the Strategy. The TMC has been comprehensively reviewed and reinvigorated following the Borthwick Review of the TMC. Industry will be involved through the development of the detailed activities in each of the key elements of the Work Plan. At the Australian Government level, an ongoing Interdepartmental Committee will also support the roll-out of the Strategy; the Australian Government Minister for Tourism will report twice yearly on progress regarding the Strategy's implementation.

The Work Plan will be taken forward by specific working groups reporting to TMC, or where existing arrangements are in place, through engaging with established groups. All jurisdictions have agreed to contribute to the work through the groups. However, it is not necessary for every jurisdiction to be a member of all groups. Collectively the Australian Standing Committee on Tourism will determine the nature of the work and report to TMC on progress in implementing the Work Plan.

One of the key tasks of the working groups will be to strengthen the information base available to industry and decision makers to improve evidence-based decision making. This will inevitably focus on the research needs of the industry. Working groups will be able to provide input and analysis to the development of the research agenda.

Strategic industry development: creating the environment to foster growth in the Australian tourism industry. This encompasses:

- Labour and skills development;
- Investment and regulatory reform;
- Destination management planning;
- Transport access and associated infrastructure development; and
- Industry resilience.

Quality and service delivery: positioning Australia to compete successfully in a global market place through providing high quality product and service to consumers. This encompasses:

- Quality assurance and accreditation;
- Indigenous tourism development; and
- Distribution of quality Australian product.

Research: to inform industry and government. An essential part of the research agenda will be communication of research outputs to industry stakeholders and decision makers. An active outreach program will be required.

The Work Plan provides the implementation map for the initial actions to be undertaken. The Work Plan describes the structures that will drive the activity, the initial outcomes and the timelines for achieving these outcomes. By the very nature of the Strategy, the Work Plan will be an evolving document; it will seek to set out the initial activities, but also recognise that further work will be required as issues are identified.

The existing milestone dates reflect the timeframe for achieving key priority actions. It is expected that the details of the Work Plan will evolve in the period to April 2010 as the working groups consider input from their membership. Further work will occur beyond September 2010 on new priorities to be identified by TMC once the work on the initial priority actions is completed. Working group Chairs will have the discretion to form larger reference groups to access expertise if required and/or smaller working groups to carry forward the actions under their components of Work Plan.

Wherever possible, the Work Plan will incorporate and seek to leverage existing resources.

STRATEGIC INDUSTRY DEVELOPMENT

Labour and Skills Development

A priority is to develop a dedicated outlook for the tourism industry's labour and skills requirements over the next five years, identifying measures to fill projected gaps. The Strategy will seek to fill these gaps by improving the tourism industry's ability to attract and retain labour in an increasingly competitive environment, through better workforce planning, improved training and career opportunities and increased labour mobility across jurisdictions.

DELIVERY MECHANISM	INITIAL OUTPUTS	Milestone dates	Working Group membership
<p>Labour and Skills Working Group (new)</p>	<ul style="list-style-type: none"> • Work with Service Skills Australia to implement the Tourism and Hospitality Workforce Development Strategy, including: <ul style="list-style-type: none"> – Finalise templates which assist tourism industry members develop effective skills and workforce plans. • Develop a plan that addresses labour and skills shortage issues in the tourism industry, which will include the following actions: <ul style="list-style-type: none"> – Build on the Australian Government's response to the inquiry into workforce challenges facing the Australian tourism sector to harness existing education and training sector capacity. – Integrate tourism labour force needs into the migration program. – Support initiatives to attract and retain young people in the tourism and hospitality industries. • Increase labour mobility across jurisdictions through addressing inconsistencies in the Responsible Service of Alcohol certification, gaming certification, food hygiene certification and further regulatory and other reforms identified by the working group. • Finalise a comprehensive workforce development plan taking into account industry growth projections and forecast employment and skills requirements, which will include the following actions: <ul style="list-style-type: none"> – Scope consultancy to examine industry growth projections for the next 5 years, mapping the geographic locations of jobs, the number and type of jobs, the skills and quantity needed for nominated durations. – In line with projections, review the effectiveness of current initiatives, including migration, to attract and retain labour and retain skilled labour. – Determine the extent to which existing education and training programs, including the 'Productivity Places Program, meet the needs of the tourism industry and provide recommendations, including to Ministers responsible for education and training, on future initiatives for the tourism industry. – Determine Recognition of Prior Learning priorities and transferability of skills for the tourism industry. – Examine models for increasing Indigenous training and employment. 	<p>September 2010</p> <p>Reporting: March 2010 & July 2010</p> <p>September 2010</p> <p>September 2010</p>	<ul style="list-style-type: none"> • Tourism Northern Territory (Chair) - • Queensland – Queensland Tourism Industry Council • Department of Resources, Energy and Tourism (RET) • Department of Education, Employment and Workplace Relations (DEEWR) • Department of Immigration and Citizenship (DIAC) • Service Skills Australia • Australian Services Union • Australian Hotels Association • Restaurant and Catering Australia

STRATEGIC INDUSTRY DEVELOPMENT

Investment and Regulatory Reform

Ensuring that Australia moves up the international tourism value chain and remains competitive requires quality tourism business products and services. Greater investment in the tourism industry will drive long-term profitability, innovation and growth in the industry. The different levels of government in Australia present regulatory challenges to businesses, resulting in complex and lengthy investment and development approval processes, and impediments to reinvestment. Regulatory reform is needed to provide transparency and certainty for investors and businesses.

DELIVERY MECHANISM	INITIAL OUTPUTS	Milestone dates	Working Group membership
Investment and Regulatory Reform Working Group (new)	<ul style="list-style-type: none"> • Complete a product gap audit of tourism experiences to establish potential areas of opportunity for world class Australian tourism development.¹ • Identify current impediments to investment in the tourism industry and develop strategies for addressing these impediments, including: <ul style="list-style-type: none"> – Review existing regulatory and taxation requirements, including depreciation rates, applying to investment in the tourism industry. – Work with COAG to reform any regulations that may impede investment in the tourism industry not already covered by COAG Working Groups. • Review current State and Commonwealth development funds and investment assistance programs to determine whether these appropriately assist investment in the tourism industry. • Establish a working model to facilitate and streamline new tourism development applications through Commonwealth, State and Local government approvals processes. • Investigate the potential of a registry of future tourism investment opportunities including workforce projections. • Audit current planning codes and determine if there is a business case for developing a voluntary National Tourism Planning Code. • Explore opportunities for a national annual event to highlight tourism development opportunities and bring projects and investors together. Investigate synergies with the proposed research Outlook conference. 	September 2010	<ul style="list-style-type: none"> • Tourism Victoria (Chair) • South Australia Tourism Commission • Tourism Western Australia • Queensland – Tourism Queensland and the Queensland Department of Employment, Economic Development and Innovation • New South Wales Department of Planning • Tourism Australia • Australian Government Department of Resources, Energy and Tourism (RET) • Australian Government Department of the Treasury • Austrade • Australian Government Department of the Environment, Water, Heritage and the Arts (DEWHA) • Australian Government Department of Finance and Deregulation • Proposed Industry representatives based on knowledge and expertise, including a representative from the finance, funds management sector.
		April 2010	
		April 2010	
		April 2010	
		September 2010	
		April 2010	
		April 2010	

¹ This will be a joint output of the Investment and Regulatory Reform Working Group and the Destination Management Planning Working Group.

STRATEGIC INDUSTRY DEVELOPMENT

Destination Management Planning

The successful delivery of quality tourism experiences relies on a number of factors that not only encompass the actual tourism product itself, but also include accessibility, the natural or urban environment, supporting infrastructure and surrounding amenities. Destination management planning allows individual destinations to develop integrated tourism plans that include consideration of all the tourism development needs such as infrastructure, labour and training, and product development, as well as a complementary marketing strategy to promote the destination.

DELIVERY MECHANISM	INITIAL OUTPUTS	Milestone dates	Working Group membership
Destination Management Planning Working Group (new)	<ul style="list-style-type: none"> Complete a product gap audit of tourism experiences to establish potential areas of opportunity for world class Australian tourism development.² Work with the National Landscapes Reference Group and State Tourism Organisations to: <ul style="list-style-type: none"> determine a mechanism to establish Destination Management Plans for regional and urban tourism areas; and identify opportunities for extending the National Landscapes model to include cultural and heritage assets across Australia, in particular, World Heritage listed assets Evaluate the extent to which existing regional/destination data meet the needs of tourism operators, investors and tourism policy makers. 	<p>September 2010</p> <p>April 2010</p> <p>April 2010</p>	<ul style="list-style-type: none"> Tourism Tasmania (Chair) Tourism Tasmania Australian Capital Tourism Tourism Queensland Tourism New South Wales Tourism NT Australian Government Department of Resources, Energy and Tourism (RET) Tourism Australia Australian Government Department of the Environment, Water, Heritage and the Arts (DEWHA) Australian Regional Tourism Network Regional Tourism Office representation Australian Local Government Association

² This will be a joint output of the Investment and Regulatory Reform Working Group and the Destination Management Planning Working Group.

STRATEGIC INDUSTRY DEVELOPMENT

Tourism Access

Given Australia's geographic position and its size, efficient transport infrastructure and links are essential to ensure Australia's competitiveness as a visitor destination. A comprehensive and integrated approach that takes into account the needs of the tourism industry is therefore vital in the consideration of transport access and infrastructure planning.

DELIVERY MECHANISM	INITIAL OUTPUTS	Milestone dates	Working Group membership
National Tourism and Aviation Advisory Committee (NTAAC)	<ul style="list-style-type: none"> Restructure NTAAC to comprise a senior peak advisory group chaired by Ministers Ferguson and Albanese, supported by a larger representational working group. Finalise new terms of reference, structure and a forward work program to address identified transport and access impediments. Report on key aviation issues and related transport access impediments for the tourism industry. Ensure that issues of concern are taken up and addressed in related groups such as the National Passenger Facilitation Committee, the National Sea Passengers Facilitation Committee and complementary policy processes. 	<p>December 2009</p> <p>March 2010</p> <p>March 2010</p> <p>March 2010</p>	<p>Peak advisory group will be chaired by Ministers, who will also appoint members to the Group. It will liaise with the TMC and others to progress transport infrastructure and access issues. The Peak Advisory Group will be supported by a larger representational group, membership of which will be drawn from the current NTAAC.</p> <p>Work plan to be advanced with recommendations to Ministers at twice yearly meetings.</p>

STRATEGIC INDUSTRY DEVELOPMENT

Industry Resilience

The tourism industry is exposed to a range of external factors and changing consumer attitudes and travel behaviour, requiring ongoing adaptation of tourism products and experiences to respond to this dynamic, competitive environment. The implications of climate change and potential policy and consumer behavioural changes in responses to climate change are a particular priority to the Australian tourism industry. Resilience in the face of external challenges, including climate change, is necessary to ensure a sustainable and economically vibrant industry. The Resilience Working Group will continue to identifying the impacts of climate change on the tourism industry and extend its work in developing industry adaptation strategies.

DELIVERY MECHANISM	INITIAL OUTPUTS	Milestone dates	Working Group membership
Resilience Working Group (upgraded from Climate Change sub-committee of ASCOT)	<ul style="list-style-type: none"> • Identify the implications of new and emerging climate change policy settings on the tourism industry. • Identify business and information programs necessary to assist the tourism industry to adapt to climate change and external shocks. • Identify mechanisms to assist businesses to develop business plans which recognise the volatility of the tourism industry. • Assess the current capacity of the tourism industry to adapt to climate change, including: <ul style="list-style-type: none"> – Understanding industry vulnerability and building adaptive capacity. – Preparing the industry for a carbon constrained future. – Repositioning tourism marketing strategies to meet the challenges and opportunities presented by climate change. – Delivering on the remaining activities identified in the Climate Change Framework for Action. • Assess the findings of the Review of the National Tourism Incident response Plan (NTIRP) for developing further work programs for the resilience Working Group. 	<p>Ongoing</p> <p>April 2010</p> <p>September 2010</p> <p>Ongoing in 2010</p> <p>September 2010</p>	<ul style="list-style-type: none"> • Tourism Queensland (Chair) • Australian Government Department of Resources, Energy and Tourism (RET) • Australian Government Department of Climate Change (DCC) • Australian Government Department of the Environment, Water, Heritage and the Arts (DEWHA) • Tourism Australia • Tourism New South Wales • Tourism Victoria • South Australia Tourism Commission • Tourism NT • Ministry of Tourism, New Zealand

QUALITY AND SERVICE DELIVERY

Quality Assurance and Accreditation

Provision of high quality, innovative tourism products and experiences, coupled with excellence in customer service, are essential to the Australian tourism industry's performance against international competitors. A National Tourism Accreditation Framework (NTAF) will be introduced to support the provision of high quality, innovative tourism products and experiences. The NTAF will offer eligible quality and accreditation program providers the opportunity to apply for a license to co-brand with the NTAF and benefit from being associated with a nationally and internationally recognised NTAF mark. A Tourism Quality Council of Australia will be established to administer the NTAF.

DELIVERY MECHANISM	INITIAL OUTPUTS	Milestone dates	Working Group membership
Tourism Quality Council of Australia (new)	<ul style="list-style-type: none"> • Establish the Tourism Quality Council of Australia. <ul style="list-style-type: none"> – Identify possible Chair and members. – Offer invitations to Chair and members. – Develop governance arrangements. • Launch the TQUAL accreditation mark. <ul style="list-style-type: none"> – Develop logo and design. – Register design with IP Australia. • Develop application packages including procedures and guidelines. • Develop information strategy. • Develop marketing strategy. <p>The development of a brand for the national Tourism Accreditation Framework will be undertaken in consultation with Austrade and the Building Brand Australia Committee.</p>	<p>To be agreed by TMC & finalised by March 2010</p> <p>January 2010</p> <p>February 2010</p> <p>December 2009</p> <p>July 2010</p> <p>December 2009</p> <p>January – March 2010</p> <p>April 2010</p> <p>December 2009 - ongoing</p>	<p>A joint working group (JWG) of industry and government representatives has worked on the development of the National Tourism Accreditation Framework since January 2008. The JWG is chaired by RET and comprises representatives from all states and territories, industry associations, and existing accreditation programs. All output from the JWG has been referred to ASCOT/TMC for consideration/decision. This JWG (membership list below) will progress the implementation of the NTAF until the Tourism Quality Council of Australia is appointed.</p> <ul style="list-style-type: none"> • Australian Government Department of Resources, Energy and Tourism (RET) (Chair) • AAA Tourism • Australian Capital Tourism • Australian Hotels Association • Australian Tourism Export Council • Ecotourism Australia • Hotel Motel and Accommodation Association • National Tourism Alliance • QLD Department of Tourism, Regional Development and Industry • Queensland Tourism Industry Council • Restaurants and Catering Australia • Service Skills Victoria • South Australian Tourism Industry

Council

- Tourism Australia
- Tourism and Transport Forum
- Tourism Council Western Australia
- Tourism New South Wales
- Tourism NT
- Tourism Tasmania
- Tourism Victoria
- Tourism Western Australia
- Western Australian Indigenous Tourism Operators
- Austrade

QUALITY AND SERVICE DELIVERY

Indigenous Tourism Development

Indigenous culture is a key point of differentiation for Australia in a highly competitive international tourism market. However, Australia's Indigenous tourism offering needs further development if it is to maximise its economic and social contribution. Australian Tourism Ministers will establish a working group to examine ways to improve the quality of Australia's indigenous tourism product offering and to maximise the participation of Indigenous Australians in the tourism industry.

DELIVERY MECHANISM	INITIAL OUTPUTS	Milestone dates	Working Group membership
<p>Indigenous Tourism Working Group (new)</p> <p>(supported by the Indigenous Tourism Government Forum)</p>	<ul style="list-style-type: none"> Identify and review existing business development and marketing and grants programs to address Indigenous tourism development requirements and Indigenous participation in the tourism industry, including building better connections between Indigenous tourism experiences and non-indigenous tourism operators. Assess the quality of Australia's Indigenous tourism offering and develop proposals to enhance the quality and accessibility of this offering. Identify new product development and marketing programs to meet identified indigenous tourism development requirements. Assess the value of a national Indigenous tourism industry representative body, to include indigenous business membership and skills development for the indigenous tourism workforce and develop a funding model. 	<p>April 2010</p> <p>September 2010</p> <p>September 2010</p> <p>September 2010</p>	<ul style="list-style-type: none"> Tourism NT (Chair) Australian Government Department of Resources, Energy and Tourism (RET) Australian Government Department of Education, Employment and Workplace Relations (DEEWR) Australian Government Department of Families, Housing, Community Services and Indigenous Affairs (FaHCSIA) Australian Government Department of the Environment, Water, Heritage and the Arts (DEWHA) Tourism Australia Indigenous Tourism Government Forum Tourism Queensland Indigenous Business Australia Western Australian Indigenous Tourism Operators Committee (WAITOC)

QUALITY AND SERVICE DELIVERY

Distribution of Quality Australian Product

A lack of information about Australian destinations and product offerings, combined with difficulties in purchasing these products online, are impediments to Australia's international competitiveness. Currently, around only 30 per cent of Australia's tourism product is represented online. There remains significant scope to increase the online distribution of Australia's tourism product. Encouraging more small and medium size tourism enterprises to accelerate the online distribution of their tourism product will increase the global visibility of Australian tourism providers.

DELIVERY MECHANISM	INITIAL OUTPUTS	Milestone dates	Working Group membership
Tourism Australia to work in partnership with states and territories and the Australian Tourism Data Warehouse	<ul style="list-style-type: none"> • Identify priorities for online activity and support for industry online development across jurisdictions. • Develop a model for consultation, cooperation and potential joint activity. <ul style="list-style-type: none"> – Explore ways to use the National Online Strategy Committee and the Australian Tourism Data Warehouse to present opportunities for better collaboration across the States in this area. • Focus on capacity-building for the industry to assist them in engaging with new forms of digital marketing and distribution. <ul style="list-style-type: none"> – Improve the uptake of digital technology by the tourism industry nationally. 	<p>April 2010</p> <p>September 2010</p> <p>September 2010</p>	<ul style="list-style-type: none"> • Tourism New South Wales (Chair) • Tourism Australia • National Online Strategy Committee • Australian Tourism Data Warehouse • Tourism Tasmania

RESEARCH

Provision of high quality and robust research and analysis for the tourism industry and governments is critical in providing the evidence to support actions that will address the structural impediments confronting the industry and enabling the industry to position itself to respond to changing market and economic conditions. Such research and analysis will also support continued policy engagement with the industry through providing the evidence base to support policy development. The research agenda will capture three broad elements: industry development, policy development and marketing. The research agenda will also require active communication with industry stakeholders, not only to inform industry but to enable industry to provide input into the research and analysis that it requires. As such, industry outreach will be a core function for the research agenda.

DELIVERY MECHANISM	INITIAL OUTPUTS	Milestone dates	Working Group membership
Research and Development Advisory Board (new)	<ul style="list-style-type: none"> • RET to establish and appoint Research and Development Advisory Board. • Research and Development Advisory Board to scope out industry research priorities. • Progress and disseminate research outcomes. • Develop the scope of the State of the Industry Report. • Develop detailed proposal for the annual Industry Research Outlook Conference. <ul style="list-style-type: none"> – Examine potential linkages with the proposed national tourism development opportunities forum. 	December 2009 April 2010 September 2010 April 2010 April 2010	<ul style="list-style-type: none"> • Secretary of the Australian Government Department of Resources, Energy and Tourism (RET)(Chair) • Tourism Australia • Deputy Statistician of the Australian Bureau of Statistics • Tourism Western Australia • Tourism Tasmania • Union representative • Industry representative (rotational) • University sector (as required) • Tourism Industry association representative (rotational)