Submission to the Victorian Parliamentary Inquiry
Into Rural and Regional Tourism

Sustainable Tourism Cooperative Research Centre and the
Australian Regional Tourism Research Centre

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INQUIRY INTO RURAL AND REGIONAL TOURISM

This submission is made on behalf of the Australian Government funded Sustainable Tourism CRC (STCRC) and the Australian Regional Tourism Research Centre (ARTRC). The ARTRC, a Centre of the STCRC, is located at Southern Cross University and works in partnership with the Australian Regional Tourism Network (ARTN) to ensure industry relevant research is undertaken and effective regional tourism extension, professional development and training services are provided in a regional context. The STCRC is currently funding an ARTRC research project examining destination development in regional Australia. In addition, the STCRC provides extension for sustainable tourism development in regional Australia. This submission addresses the six components of the Inquiry namely:

- The economic benefits of tourism in regional areas;
- The potential impediments to the sustained growth of regional tourism; economic activity and jobs
- The effectiveness of current programs to promote and enhance tourism in regional Victoria;
- Initiatives to increase both international and domestic visitors nights in regional Victoria;
- The efficacy of existing mechanisms at a National, State and local level to address the impact on regional tourism of natural events such as bushfires, floods and drought, and effective measures to drive long term economic recovery;
- Opportunities to leverage private investment and commercial activity in regional tourism infrastructure, including ecotourism.

Overview

Direct domestic and international visitor expenditure in Australian amounted to over $63.6 billion in the year to September 2005. During the same period, expenditure by domestic and international visitors in rural and regional Australia amounted to $30 billion or approximately 47% of total spending (Tourism Research Australia 2006). These figures indicate that the tourism industry makes a substantial contribution to the Australian economy and that the rural and regional tourism sector is an important component.

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1 It is important to note that while reference is often made to the tourism industry, the tourism sector is in fact tourism is made up of number of industries. In this report where reference is made to the tourism industry it is referring to all the industries that constitute the sector.
In addition to contributing directly to production, tourism can assist rural and regional economies to diversify and become less reliant on primary and extractive industries such as farming and mining. Effectively managed tourism in rural and regional areas also provides substantial externality benefits such as improved services and products for local residents, improved infrastructure, improved civic pride, etc.

The benefits that tourism offers cannot be taken for granted. In Australia, the sector experienced a sharp decline in 2005, and despite an improvement in 2006, it faces a number of challenges, such as increasing international competition, labour and skills shortages and changing consumer spending patterns. These challenges need to be addressed in order to have a sustainable and expanding industry into the future.

Visitation
During the year to September, 2005, there were 204,513,000 domestic and international visitors in Australia. These visitors accounted for 415,456,000 visitor nights spent in Australian cities and regions. International visitors constituted approximately 32% of all visitor nights. Total visitor nights spent in regional Australia constituted approximately 51% of all visitor nights.

In the year to September, 2005, approximately 3,595,000 international visitor nights were spent in regional Victoria (approximately 14% of all international visitor nights spent in Victoria). In addition, approximately 33,595,000 domestic visitor nights were spent in regional Victoria (approximately 65% of all domestic visitors nights spent in Victoria). The Victorian regional percentage shares of visitor nights are similar to those for regional NSW but regional Queensland attracts a higher percentage of international visitor nights (45% of all international visitor nights spent in Queensland) (Tourism Research Australia 2006).

The economic benefits of tourism in regional areas

Determining the economic benefit of tourism to Australia and to regional areas can be difficult since the benefits accrue from a number activities extending over a range of sectors. The development of the Satellite accounts have helped overcome these difficulties to a substantial degree, however determining the economic benefits remains problematic.

Direct visitor expenditure refers to the initial money paid by a visitor to a supplier of a tourism product, and instigates the first positive economic impact. A tourist paying entrance fees to an art-gallery, or paying to partake in a tour are examples of direct visitor expenditure. The effects of this initial spending have a flow-on effect throughout
the community, as the money obtained from the tourist in the first instance is often re-used in the local area. Thus, *indirect revenue* continues to be generated by the ongoing circulation of the initial visitor expenditure within the economy of the destination. The effects of this often lead to other positive economic impacts in the region, such as an increase in employment. One of the most common methods used to calculate the indirect effects of tourism spending is the tourism multiplier.

In addition to multipliers, economists have applied advanced modelling techniques to estimating tourism’s contribution to regional and national economies. The most common models are input-output (IO) and computable general equilibrium (CGE). The IO model uses a list of the region’s entire purchases (input) and sales (output) transactions in order to analyse the effect tourism is having on input and output behaviour. CGE models are similar, but are more flexible in terms of their representation of the relationship between supply and demand.

The multiplier effect should be taken into account when considering figures of direct expenditure by tourists. It should be noted that the size of the multiplier is affected by the size and the range of variety within the regional economy (Prosser et al. 2000).

There are a number of economic benefits for regional areas other than just expenditure and the multiplier effects. For example, local governments benefit from increased rates and levies, which can fund improvements in local infrastructure and services. Regional tourism may keep regional residents from migrating to urban areas to find employment. It can assist in the development of export markets through businesses initially created to cater for tourists moving into the export market, for example, Yarra Valley and Mornington Peninsula wineries and the Lavandula lavender farm in Hepburn Springs. Tourism also has the potential to attract investment into rural and regional areas.

**Visitor expenditure**

For year ending September 2005, all visitors in Australia spent approximately $63.7 billion, of which approximately $30 billion or 47% was spent in Australia’s regions. In Victoria, regional visitation expenditure amounted to approximately $5.3 billion or 42.5% of all Victorian visitor expenditure (Tourism Research Australia 2006).

Total expenditure by domestic **day** visitors in regional Victoria was $1.7 billion in year to September, 2005, total expenditure by domestic **overnight** visitors was $3.3 billion and total expenditure by international visitors was $0.2 billion (Tourism Research Australia 2006). Clearly there is potential to generate greater international visitor spending in regional Victoria.
Total Expenditure
Tourism industry gross value added (GVA) represents the total basic value of Australian produced goods and services consumed by all visitors (international, interstate, intrastate, and outbound) after deducting the costs of goods and services used in the process of production. Value added is the most widely accepted measure of the contribution of an industry to the economy.

In 2003/04, tourism industry GVA (gross value added) in Victoria equated to approximately $9.4 billion or 5.1% of Victorian GVA. In the same period, tourism contributed $10.9 billion or 5.3% of Victoria’s total gross state product (GSP) and $3.4 to regional economies in Victoria (Tourism Victoria 2006). GPS is GVA plus net taxes on products consumed by tourists (including taxes on imports consumed by tourists).

In terms of contribution to Victoria’s gross value added, tourism compares favourably with many traditional industries such as agriculture, forestry and fishing; electricity, gas and water supply; personal and other services; mining; and cultural and recreational services (Tourism Victoria 2006).

Employment
Johnson et al. (2001) found a direct link between the amount of visitor expenditure in a region and employment generated in tourism for that region. Using the BTR's national economic contribution study from 1996-97, Johnson et al. determined the types of visitor expenditure to lend the greatest contribution to employment per dollar were:

- Accommodation;
- Education and conference fees; and
- Other items (including phone calls, postage, health services, film development, pet minding services etc) (Johnson et al. 2001 p192)

Approximately 20 jobs were generated throughout Australia for every $1 million of visitor expenditure on these items. However, only 4 jobs were generated in Australia for every $1 million of visitor expenditure on fuel or airfares (Johnson et al. 2001).

Spending on shopping, food and drink and packages generated in the region of 12 jobs per $1 million of expenditure, while expenditure on entertainment and transport (non-air) created on average, 10 jobs per $1 million of expenditure (Johnson et al. 2001). In 2003/04, tourism employment in Victoria was estimated to be 159,000 or 6.6% of total employment in Victoria (Tourism Victoria 2006).
Recommendations:
1. Rural and regional destinations need to undertake visitor studies in order to collect market intelligence on the visitors, their preferences and the changing nature of visitors.
2. Stakeholders in rural and regional destinations, as part of their planning processes, need to actively engage with government at all levels and their local community. In the engagement process the importance of the tourism industry needs to be emphasised.

The potential impediments to the sustained growth of regional tourism; economic activity and jobs

There are impediments faced by the industry generally and there are also those faced by the rural and regional industry specifically. As stated earlier, there was a sharp downturn in the industry in 2005, however, domestic tourism in Australia has been relatively stagnant since 1985, indicated by falling visitor nights, trips, and visitor expenditure in all States and Territories (see Tourism Research Australia & the Travel Research Centre 2007). The figures for domestic tourism are forecast to improve only slightly in the near future.

The decline in domestic tourism is particularly worrying for the rural and regional sector since domestic visitor expenditure contributes nearly $27 billion to regional economies.

A number of reasons have been suggested for the downturn in domestic tourism. The reasons are:

- Rising petrol prices. Rising petrol prices can have a particularly substantial impact on the drive market;
- Increased competition for consumers’ disposable income. Consumers are spending increasingly larger proportions of their disposable income on home renovations, furniture and home entertainment systems, etc. The purchase of these goods is facilitated by the availability of interest free periods;
- The introduction of low cost airlines offering cheap international flights to overseas destinations. In addition to putting considerable pressure on the domestic industry, consumers often perceive travel within Australia to be less exotic than to overseas destinations and as a consequence there is more prestige associated with international travel;
Rising interest rates and increased levels of debt have also made consumers less likely to travel. It appears a number of Australians are opting to reduce their debt levels at the expense of consumer spending;
- The strength of the Australian dollar; and
- Changing work culture and stockpiled annual leave. Increasing numbers of people are not taking the full leave entitlements due to job insecurity and the demand of modern employment.

Further impediments to the sustainable growth of tourism, economic activity and jobs in regional Victoria include:
- Labour skills shortages in rural and regional Victoria;
- Out-dated and variable quality accommodation and tourist facilities;
- Changing Australian demographics – a move away from the traditional nuclear family holidays, generation X desiring different experiences and having less time to travel;
- The Travel Research Centre (TRC) found that Australians believed travel in Australia represented poor value for money;
- A rise in the Asian travel market which require different products/infrastructure;
- Drought and related negative publicity in regional areas;
- Natural disasters for example, bushfires destroying natural resources in the Grampians and Alpine region forests;
- Carbon guilt may entice Australians to travel domestically rather than internationally, but is likely to reduce the number of international visitors to Australia, which will also negatively impact on regional tourism.

(Adapted from Tourism Research Australia & the Travel Research Centre 2007)

As a result of these negative influences on domestic travel, the TFC forecasts domestic visitor nights to grow only marginally over the medium term, reaching 291 million nights in 2015. This figure will represent an average annual growth of only 0.5 per cent a year between 2005 and 2015. A similar profile is forecast for the economic contribution of domestic tourism, with average annual growth of 0.7 per cent over that period leading to TDEV of $59 billion (in real terms) in 2015 (Tourism Research Australia & the Travel Research Centre 2007).
Recommendations:
1. Funding should be provided for research to examine specific factors that are affecting visitation in rural and regional Victoria, for example, determining the impact of regional airports on dispersion within Victoria.
2. The Victorian government should liaise closely with the STCRC and the Australian Regional Tourism Network to determine the research priorities for the Victorian rural and regional tourism industry.
3. Funding should be provided for training and assistance to rural and regional tourism destinations in destination management planning throughout Victoria.
4. Funding should be provided for the upskilling of managers and employees in the Victorian rural and regional tourism industry.

The effectiveness of current programs to promote and enhance tourism in regional Victoria

Tourism Victoria has played an important and on-going role in strategic planning for tourism, assisting the regions of Gippsland, Grampians, Great Ocean Road, Goldfields, Murray and North East Victoria in the development of Regional Tourism Development Plans. In addition, plans and strategies such as the Victorian Trails Strategy (2005-2010), Victoria’s Aboriginal Tourism Development Plan (2006-2009), Concept Proposals for Tourism Development in Victoria and current work being undertaken to develop a Nature-based Tourism Strategy provide further strategic direction for rural and regional areas. It is also significant to acknowledge that Victoria’s Tourism Industry Strategic Plan 2002–2006 explained that Victoria’s regions were at different levels of tourism development and needed an integrated approach to planning in order to maximise their potential.

In addition, Tourism Victoria’s Jigsaw campaign and related advertising collateral is well regarded as an important initiative in promoting tourism in Victoria. The campaign was introduced in 1993 to raise awareness of regional destinations through the development and implementation of integrated brand campaigns. The focus of these campaigns has been on destinations within close proximity to Melbourne to extend the sophisticated and stylish Melbourne brand. Marketing campaigns highlight the key product strengths, personality and benefits of regional destinations and facilitate regional tourism industry buy-in (Wirne 2007).

Wirne (2007) identified a number of factors that have underpinned the success of the Tourism Victoria Jigsaw marketing strategy:
Industry cohesion  
Market research  
Consistency  
Emotional connection with the consumer  
Creativity – standing out in a cluttered marketplace  
Raised awareness of regional destinations through the development and implementation of integrated brand campaigns

In terms of infrastructure development, the Victorian Government’s **Regional Infrastructure Development Fund (RIDF)** provides support for capital works that enhance the development of rural and regional Victoria. This Fund supports new industry development; facilitates the linkage to transport infrastructure; provides funding for improved tourism facilities; and better links regional Victoria with new opportunities in education and information and communication technologies (ICT) infrastructure.

Through the Small Towns Development Fund, which is based on a $2 to $1 grant, regional councils in Victoria can apply for tourism infrastructure development. This development can be for new and/or improved developments to encourage growth and improve socio-economic opportunities. These grants are generally for a maximum of $250,000 per project and can be used for Visitor Information Centre (VIC) upgrades, interpretative signage, providing facilities at local attractions. For example, the Flagstaff Hill redevelopment was partly funded through RIDF as was the Buchan Caves VIC.

From a national perspective, the Federal Government provides a number of initiatives that are aimed at promoting tourism at a national and state level. In addition, there are other initiatives aimed at economic development generally that can be used by the tourism sector to engender growth. Most of these initiatives do not specifically target rural and regional tourism in Victoria but can be used directly by this sector. Additionally, initiatives that are effective in encouraging greater domestic and international tourism will indirectly improve Victorian rural and regional tourism. The range of initiatives available is outlined in Appendix 2.

The Australian Tourism Development Program (ATDP) initiative, which resulted from the implementation of the Tourism White Paper, is a competitive merit-based grants program that funds regional tourism projects in Australia. The Program is administered by AusIndustry. Two examples of the use of ATDP in Victoria are the 2006 grant of $314,280 for help in developing the Melbourne to Adelaide Touring Route and the 2006 Phillip Island Nature Park Board of Management grant for $100,000 to upgrade the Koala Conservation Centre and educational facilities. The Phillip Island development is expected to generate an additional 30,000 visitors to the area. In the 2007 Budget, the government extended funding for this program for a further three years by $24.9 million.
There was also provision for an extra $10 million for two years specifically for regional tourism development projects in drought affected areas.

In addition to government programs and initiatives, the Sustainable Tourism CRC has undertaken a number of research projects and developed extension programs and toolkits that will enhance tourism in rural and regional Victoria. The following provides specific examples of two STCRC research products that can enhance the performance and quality of regional tourism (A full list of toolkits available from the STCRC are contained in Attachment 3 of this submission).

**Visitor Information Centre (VIC) Kit**

The VIC toolkit was developed to encourage operators to monitor performance and subsequently introduce strategies to increase their contribution to improving regional yield. The kit is in operation in hundreds of Visitor Centres around the country, including those in rural and regional Victoria, and has helped operators focus on developing strategies to increase performance in building yield. Effective VICs can encourage visitors to spend more nights in a region.

**Motel Makeover Kit**

Many motels across Australia, and especially in regions, are urgently in need of refurbishment but operators often do not know how to meet the needs of the market and commonly have very limited budgets. Motel Makeover provides guidance for moteliers on what tourists need as well as advice on achieving cost-effective, profit-maximising renovation programs. The tools can also be applied to the hotel and bed and breakfast sectors. Currently, AAA Tourism is distributing Motel Makeover across the country.

The STCRC extension programs build on the research and the toolkits, to provide in-situ training in various aspects of sustainable tourism development and management. For example, the Farm and Nature Tourism extension program involves working with landholders interested in tourism through a two stage process. Stage one involves landholders in an assessment of the suitability of their property, themselves and region, in terms of tourism. Once landholders complete Stage one and feel that there is potential for developing a tourism product they undertake Stage two which involves four workshops that provides them, on completion, with a business plan and strong networks within the local tourism industry. Other extension activities currently being developed by the ST CRC to assist regional areas include the Good Living Program and Local Government Tourism Planning.

Findings of the STCRC research work currently being undertaken in the Grampians, Great Ocean Road and Daylesford regions as part of the STCRC Sustainable Regional Tourism Destinations Project in 2006, that investigates best practice in the sustainable tourism development, marketing and management of regional tourism destinations, have
confirmed the leadership role of Tourism Victoria in initiating best practice in the destination planning and marketing of these regions. Preliminary findings of this project of 22 regional destinations around Australia have identified the following factors that can contribute to improved policy, planning, governance, management and marketing of regional destinations and regions (Lawrence, 2007):

**Destination Development**

- Link to lifestyle, that is, a good place to live translates into a good place to visit;
- A destination/region that acknowledges and links to its iconic features;
- Conservation of natural and built environments, for example, through development control mechanisms;
- Development of appropriate infrastructure & support facilities;
- Access to population centres;
- Effective transport systems;
- Range and diversity of visitor activities and experiences;
- Diverse tourism enterprises that have been developed to reflect community values;
- Influence of key events; and
- Acknowledgment of community value.

**Destination Management**

- Effective management structures that encourage stakeholder cooperation;
- Adaptive policies and strategic planning for tourism;
- Engagement of local tourism operations in policy and planning;
- Good level of local government support for tourism;
- Local leadership and tourism expertise, including a strong local tourism association;
- STO support and an effective RTO;
- Research to support decision-making;
- Consistent visitor data collection;
- Consideration of funding sources/models;
- Effective Visitor Information Centres;
- Quality customer service standards & training;
- Education to community, local government & operators of the importance of tourism;
- Crisis management planning; and
- Integration of tourism stakeholders with environmental agencies.
Destination Marketing

- Strong and consistent image and branding;
- Promotion of iconic features and attractions;
- Link of the core destination to attributes and activities of the broader region;
- Strategic marketing planning, including tactical campaigns;
- Cooperative marketing across state/regional/local levels;
- Good level of support from STO/RTO;
- Consistent & quality information – website/ visitor guide/signage/brochure;
- Identification of the ‘right’ target markets;
- Operators that showcase the destination;
- Delivery of the promise using realistic messages;
- Leveraging PR and media exposure;
- Ensuring development of product suits the market; and
- Evening out seasonality.

Furthermore, other factors that can enhance tourism in rural and regional tourism include:

- the perception that Australia is an attractive and safe holiday destination;
- expanding interest in cultural and Indigenous tourism;
- regional involvement in the MICE (meetings, incentive travel, conventions and exhibitions) industry (with opportunities for pre- and post-event tours);
- the proliferation of events in regional centres;
- the identification of niche markets (e.g. in educational tourism) able to be serviced by regional operators;
- the availability of the outback and the presence of current and potential iconic and World Heritage attractions;
- the success of the wine industry and its synergistic relationship with tourism;
- growth in the retiree market (the grey nomads);
- recognition of tourism's potential to contribute to health and wellbeing (e.g. cycling and walking holidays); and
- the willingness to provide volunteer services in regional communities.
Recommendation:

1. Funding should be provided for educating and training stakeholders in the rural and regional Victorian tourism industry to effectively access existing programs available at a state and federal level.

2. Funding should be provided for monitoring the effectiveness of the various initiatives available for the development and promotion of rural and regional tourism in Victoria.

3. Further funding needs to be provided for initiatives that have had effective outcomes for rural and regional tourism in Victoria.

4. There needs to be on-going funding to enable destinations to undertake effective Destination Management Planning.

The efficacy of existing mechanisms at a national, state and local level to address the impact on regional tourism of natural events such as bushfires, floods and drought, and effective measures to drive long term economic recovery

Clearly, in Victoria, rural and regional areas are susceptible to natural events such as bushfires, floods and droughts. It is also possible that such events may increase as a consequence of climate change and global warming. To ensure the long term sustainability of the industry in regions governments at all levels must be able to respond to such changes in a short time frame. Disaster management plans at a local level need to be developed as part of Destination Management Planning.

There have been various Disaster Management frameworks developed to help destinations recover from events. For example, Faulkner (1999) undertook an STCRC research project Tourism Disasters: Towards a Generic Model. Faulkner developed a disaster management framework specifically in the context of tourism. This report is available from the STCRC.

In 2007, the APEC Tourism Working Group released an authoritative Tourism Risk Management Guide and training package to help businesses dependent on the tourism trade to survive natural disasters and crises. (www.apec.org/content/apec/publications/all_publications/tourism_working_group.html)

The Tourism Risk Management Guide utilises the crisis management strategies of prevention/mitigation, preparedness, response and recovery originally developed by the
United Nations Disaster Relief Organization (UNDRO) over thirty years ago. The Guide provides suggestions for the composition of, and tasks for, a destination’s crisis planning committee. The Guide provides the key elements of a crisis response management plan; examines the training and exercising (testing) needs of a destination’s crisis management team; and describes crisis recovery processes (APEC 2007). The STCRC is currently examining the development of a risk management program that will complement APEC’s guide.

It appears that the Victorian government and Tourism Victoria have in recent times responded in a very effective manner to bushfires in rural and regional tourism destinations, for example, in the Grampians region in January and February, 2006. Stakeholders from the Grampians tourism industry who participated in workshops as part of the Sustainable Regional Tourism Destinations Project, facilitated by the ARTREC, were very positive in their assessment of the government’s response to the recent bushfire in that region.

Recommendations:
1. Disaster management planning needs to be incorporated into destination management planning throughout Victoria.
2. Crisis management plans need to be developed for all Victorian rural and regional destinations.
3. Funding should be provided for training in risk management in all rural and regional tourism destinations in Victoria.

Opportunities to leverage private investment and commercial activity in regional tourism infrastructure, including ecotourism.

There has been a degree of difficulty in attracting private sector investment in regional tourism due to the perception of low returns. Public-private partnerships (PPPs) refer to arrangements whereby the public and private sectors work together to provide a service. PPPs are most commonly associated with governments working in partnership with the private sector to create and operate large-scale public infrastructure projects such as roads, buildings, and some social services (English & Guthrie 2003). These arrangements are often called PFPs (Privately Financed Projects) within Australia. The push for PFPs and PPPs, whatever their scale or level, is justified by governments on the assumption that they are more cost- and staff-efficient, provide better services, and spread risks to the private sector (Edwards & Shaoul 2003; New South Wales Government 2001). However, until recently, the travel and tourism industry has been
hesitant in establishing public/private partnerships, because of the very competitive market within which it operates (De Lacy et al. 2002).

Public/private tourism partnerships can represent a pooling of knowledge, expertise, capital and other resources from various stakeholders (Bramwell and Lane 2000). There appears to be substantial scope for sustainable private tourism sector involvement as a way of securing income-generation for protected area managers and the tourism sector (IUCN, 2003). Protected area agencies in Australia have partnered with the private tourism sector in a number of ways resulting in many benefits including planning partnerships where local governments and the private sector combine with parks agencies to promote low-impact ‘gateways’ and the development of commercial tourism infrastructure inside parks (See Buckley 2004 for a detailed discussion).

In an effort to encourage greater use of partnerships the TTF put forward a number of opportunities for private investment in visitor infrastructure which can generate profits, match visitor expectations and ensure sustainability (TTF 2004). The TTF suggestions include commercial leases of heritage buildings, specialist infrastructure for viewing wildlife or marine life, and limited private visitor facilities in remote parks as some of the best opportunities for partnership arrangements between protected areas and private operators. These arrangements can provide additional opportunities for businesses to earn livelihoods and generate income from the ecotourism market.

The development of additional ecotourism experiences, catering for a range of ages, cultures, backgrounds, outdoor recreation skill-levels and expectations in rural and regional will improve the competitiveness of the destinations where these developments occur.

**Recommendations:**

1. Funding needs to be provided for further research into the determinants of private sector tourism investment in rural and regional in Victoria.
2. Funding needs to be provided for the training of rural and regional tourism organisations in seeking investment funds.

**Conclusion**

As demonstrated in this submission, tourism contributes to the economic well-being of rural and regional areas in Victoria. The industry, especially the domestic sector, has been relatively flat for a number of years therefore there is a need for State Government departments and its agencies to provide further leadership and guidance to assist rural and regional areas. There is a need to identify programs and initiatives available at
national and state levels that help to ensure sustainable economic development and positive social and environmental outcomes for regional Victoria into the future. In addition, consideration should be provided to conserve and protect the natural and built environments of these areas. On-going strategic destination planning and management is required to identify sustainable tourism development opportunities, to assist with destination management and marketing.

References

www.apec.org/content/apec/publications/all_publications/tourism_working_group.html


APPENDIX 1:

Tourism statistics for submission to the Victorian Parliamentary Inquiry into Rural and Regional Tourism

Visitation

Table 1 Visitation in Australia, Victoria and Regional Victoria, Year ended September 2005

<table>
<thead>
<tr>
<th></th>
<th>Australia '000</th>
<th>Victoria '000</th>
<th>% of Australian total</th>
<th>Regional Victoria '000</th>
<th>% of Victorian total</th>
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<td>International Visitors</td>
<td>5 038</td>
<td>1 355</td>
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<td>Domestic Day Visitors</td>
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<td>31 494</td>
<td>24.45</td>
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<td>Domestic Overnight Visitors</td>
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<td>23.55</td>
<td>11 191</td>
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<td>204 513</td>
<td>49 488</td>
<td>24.20</td>
<td>32 838</td>
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Figure 1: Total International Visitor Nights in Regional Victoria, 1999-2006
(Source IVS Data 2006 This information excludes data from the categories of Transit VIC and Other VIC)
Domestic Visitor Nights in Regional Victoria

Year ending

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<th>Year</th>
<th>Visitor Nights (000)</th>
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<td>2003</td>
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<td>2005</td>
<td>32,480</td>
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<td>2006</td>
<td>32,718</td>
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Figure 2: Total Domestic Visitor Nights in Regional Victoria, 1999-2006
(Source NVS Data 2006. This information excludes data from the categories of Transit VIC and Other VIC)

International Visitor Nights in Regional Australia: Comparison by State/Territory

Year

No. Visitor Nights (000)

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<td>2006</td>
<td>8500</td>
<td>4500</td>
<td>6500</td>
<td>5500</td>
<td>5000</td>
<td>5000</td>
<td>2250</td>
<td>2250</td>
</tr>
</tbody>
</table>

Figure 3: International Visitors Nights in Regions by State and Territory, 1999-2006
(Source IVS data 2006. This information excludes data from the categories of Transit and Other for All States and Territories)
Figure 4: Domestic Visitors Nights in Regions by State and Territory, 1998-2006
(Source: NVS data 2006. This information excludes data from the categories of Transit and Other for All States and Territories)

Figure 5: State and Territory Contributions to International Visitors in Regions, 2006
(Source: IVS data 2006. This information excludes data from the categories of Transit and Other for All States and Territories)
State/Territory Contributions to Australia's Total Domestic Regional Visitor Nights 2006

![Pie chart showing contributions by state/territory]

Figure 6: State and Territory Contributions to Domestic Visitors in Regions, 2006
(Source: NVS data 2006)

Visitor expenditure

Table 2 Expenditure by Visitors in Australia, Victoria and Regional Victoria, Year ended September 2005

<table>
<thead>
<tr>
<th></th>
<th>Australia</th>
<th>Victoria</th>
<th>% of Australian total</th>
<th>Regional Victoria</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$m</td>
<td>$m</td>
<td></td>
<td>$m</td>
<td></td>
</tr>
<tr>
<td>International Visitors</td>
<td>12 697</td>
<td>2 365</td>
<td>18.63</td>
<td>231</td>
<td>9.77</td>
</tr>
<tr>
<td>Domestic Day Visitors</td>
<td>11 825</td>
<td>2 734</td>
<td>23.12</td>
<td>1 683</td>
<td>61.56</td>
</tr>
<tr>
<td>Domestic Overnight Visitors</td>
<td>39 131</td>
<td>7 249</td>
<td>18.52</td>
<td>3 333</td>
<td>45.99</td>
</tr>
<tr>
<td>Total</td>
<td>63 653</td>
<td>12 348</td>
<td>19.39</td>
<td>5 247</td>
<td>42.49</td>
</tr>
</tbody>
</table>
Figure 7: Domestic day, domestic overnight and international expenditure in each state/territory, year ended 30 September 2005


Base: All visitors aged 15 years and over.
Expenditure excludes major purchases such as motor vehicles.

Source: TRA expenditure allocation method applied to 2004 and 2005 National and International Visitor Survey data.
Table 3: Domestic day visitor expenditure in capital cities and regional areas of each state and territory, year ended 30 September 2005

<table>
<thead>
<tr>
<th>Region</th>
<th>Expenditure</th>
<th>Share of expenditure</th>
<th>Visitors</th>
<th>Expenditure per visitor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sydney</td>
<td>1 420</td>
<td>36</td>
<td>13 521</td>
<td>105</td>
</tr>
<tr>
<td>Regional NSW</td>
<td>2 549</td>
<td>64</td>
<td>27 738</td>
<td>92</td>
</tr>
<tr>
<td>Total NSW</td>
<td>3 970</td>
<td>100</td>
<td>41 259</td>
<td>96</td>
</tr>
<tr>
<td>Melbourne</td>
<td>1 051</td>
<td>38</td>
<td>10 155</td>
<td>103</td>
</tr>
<tr>
<td>Regional VIC</td>
<td>1 683</td>
<td>62</td>
<td>21 339</td>
<td>79</td>
</tr>
<tr>
<td>Total VIC</td>
<td>2 734</td>
<td>100</td>
<td>31 494</td>
<td>87</td>
</tr>
<tr>
<td>Gold Coast</td>
<td>475</td>
<td>19</td>
<td>5 850</td>
<td>81</td>
</tr>
<tr>
<td>Brisbane</td>
<td>778</td>
<td>31</td>
<td>8 867</td>
<td>88</td>
</tr>
<tr>
<td>Regional QLD</td>
<td>1 236</td>
<td>50</td>
<td>13 570</td>
<td>91</td>
</tr>
<tr>
<td>Total QLD</td>
<td>2 490</td>
<td>100</td>
<td>28 286</td>
<td>88</td>
</tr>
<tr>
<td>Adelaide</td>
<td>371</td>
<td>43</td>
<td>2 614</td>
<td>142</td>
</tr>
<tr>
<td>Regional SA</td>
<td>491</td>
<td>57</td>
<td>6 851</td>
<td>72</td>
</tr>
<tr>
<td>Total SA</td>
<td>862</td>
<td>100</td>
<td>9 465</td>
<td>91</td>
</tr>
<tr>
<td>Perth(^d)</td>
<td>719</td>
<td>63</td>
<td>8 288</td>
<td>87</td>
</tr>
<tr>
<td>Regional WA</td>
<td>420</td>
<td>37</td>
<td>3 592</td>
<td>117</td>
</tr>
<tr>
<td>Total WA</td>
<td>1 139</td>
<td>100</td>
<td>11 880</td>
<td>96</td>
</tr>
<tr>
<td>Hobart(^d)</td>
<td>87</td>
<td>25</td>
<td>888</td>
<td>98</td>
</tr>
<tr>
<td>Regional TAS</td>
<td>269</td>
<td>75</td>
<td>3 133</td>
<td>86</td>
</tr>
<tr>
<td>Total TAS</td>
<td>356</td>
<td>100</td>
<td>4 021</td>
<td>89</td>
</tr>
<tr>
<td>Darwin</td>
<td>59</td>
<td>60</td>
<td>505</td>
<td>118</td>
</tr>
<tr>
<td>Regional NT</td>
<td>40</td>
<td>40</td>
<td>409</td>
<td>97</td>
</tr>
<tr>
<td>Total NT</td>
<td>99</td>
<td>100</td>
<td>914</td>
<td>108</td>
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<tr>
<td>Canberra</td>
<td>175</td>
<td>100</td>
<td>1 511</td>
<td>116</td>
</tr>
<tr>
<td>Total ACT</td>
<td>175</td>
<td>100</td>
<td>1 511</td>
<td>116</td>
</tr>
<tr>
<td>Total capital cities</td>
<td>5 136</td>
<td>43</td>
<td>52 199</td>
<td>98</td>
</tr>
<tr>
<td>Total regional</td>
<td>6 689</td>
<td>57</td>
<td>76 632</td>
<td>87</td>
</tr>
<tr>
<td>Total Australia</td>
<td>11 825</td>
<td>100</td>
<td>128 831</td>
<td>92</td>
</tr>
</tbody>
</table>

Base: All visitors aged 15 years and over.
Figures may not add to the total due to rounding.
The number of visitors do not sum to the total as visitor numbers are calculated as net visits. See Carter and Collins (2005a) for more detail.
Expenditure excludes major purchases such as motor vehicles.
Total Australia includes small amounts that cannot be allocated to a particular state/territory.
a. For Queensland, capital city includes the Gold Coast.
b. Regional areas in each state/territory, except for Queensland, include all regions in that state/territory except the capital city. In Queensland, the regional area includes all regions except Brisbane and the Gold Coast.
c. Estimates for Perth are for the Experience Perth tourism region.
d. Estimates for Hobart are for the Hobart and Surrounds tourism region.

Source: TRA expenditure allocation method applied to 2004 and 2005 National Visitor Survey data.

Table 4: Domestic overnight visitor expenditure in capital cities and regional areas of each state/territory, year ended 30 September 2005

<table>
<thead>
<tr>
<th>State/territory</th>
<th>Expenditure</th>
<th>Share of expenditure</th>
<th>Visitors '000</th>
<th>Visitor nights '000</th>
<th>Expenditure per visitor</th>
<th>Expenditure per night</th>
<th>Average length of stay Nights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sydney</td>
<td>4 313</td>
<td>10</td>
<td>7 367</td>
<td>20 000</td>
<td>586</td>
<td>206</td>
<td>3</td>
</tr>
<tr>
<td>Regional NSW</td>
<td>6 854</td>
<td>61</td>
<td>17 551</td>
<td>64 751</td>
<td>391</td>
<td>106</td>
<td>4</td>
</tr>
<tr>
<td>Total NSW</td>
<td>11 166</td>
<td>100</td>
<td>24 203</td>
<td>85 670</td>
<td>461</td>
<td>130</td>
<td>4</td>
</tr>
<tr>
<td>Melbourne</td>
<td>3 015</td>
<td>54</td>
<td>5 884</td>
<td>17 012</td>
<td>666</td>
<td>210</td>
<td>3</td>
</tr>
<tr>
<td>Regional VIC</td>
<td>3 333</td>
<td>46</td>
<td>11 191</td>
<td>33 595</td>
<td>298</td>
<td>99</td>
<td>3</td>
</tr>
<tr>
<td>Total VIC</td>
<td>7 249</td>
<td>100</td>
<td>16 639</td>
<td>51 537</td>
<td>436</td>
<td>141</td>
<td>3</td>
</tr>
<tr>
<td>Gold Coast</td>
<td>3 073</td>
<td>28</td>
<td>3 573</td>
<td>17 150</td>
<td>860</td>
<td>170</td>
<td>5</td>
</tr>
<tr>
<td>Brisbane</td>
<td>2 262</td>
<td>20</td>
<td>4 703</td>
<td>15 931</td>
<td>481</td>
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</tr>
<tr>
<td>Regional QLD</td>
<td>5 825</td>
<td>52</td>
<td>9 248</td>
<td>42 308</td>
<td>630</td>
<td>138</td>
<td>5</td>
</tr>
<tr>
<td>Total QLD</td>
<td>11 160</td>
<td>100</td>
<td>16 570</td>
<td>75 438</td>
<td>674</td>
<td>148</td>
<td>5</td>
</tr>
<tr>
<td>Adelaide</td>
<td>1 333</td>
<td>55</td>
<td>2 100</td>
<td>7 811</td>
<td>635</td>
<td>171</td>
<td>4</td>
</tr>
<tr>
<td>Regional SA</td>
<td>1 079</td>
<td>45</td>
<td>3 289</td>
<td>11 278</td>
<td>328</td>
<td>96</td>
<td>3</td>
</tr>
<tr>
<td>Total SA</td>
<td>2 412</td>
<td>100</td>
<td>5 132</td>
<td>19 090</td>
<td>470</td>
<td>126</td>
<td>4</td>
</tr>
<tr>
<td>Perth</td>
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<td>49</td>
<td>2 874</td>
<td>11 683</td>
<td>653</td>
<td>161</td>
<td>4</td>
</tr>
<tr>
<td>Regional WA</td>
<td>1 943</td>
<td>51</td>
<td>3 443</td>
<td>17 892</td>
<td>564</td>
<td>109</td>
<td>5</td>
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<tr>
<td>Total WA</td>
<td>5 820</td>
<td>100</td>
<td>6 013</td>
<td>29 575</td>
<td>635</td>
<td>129</td>
<td>5</td>
</tr>
<tr>
<td>Hobart</td>
<td>574</td>
<td>41</td>
<td>921</td>
<td>3 376</td>
<td>623</td>
<td>170</td>
<td>4</td>
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<td>1 463</td>
<td>5 737</td>
<td>561</td>
<td>143</td>
<td>4</td>
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<tr>
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<td>100</td>
<td>2 052</td>
<td>9 113</td>
<td>680</td>
<td>153</td>
<td>4</td>
</tr>
<tr>
<td>Darwin</td>
<td>625</td>
<td>54</td>
<td>573</td>
<td>3 575</td>
<td>1 082</td>
<td>175</td>
<td>6</td>
</tr>
<tr>
<td>Regional NT</td>
<td>523</td>
<td>46</td>
<td>623</td>
<td>3 230</td>
<td>347</td>
<td>163</td>
<td>5</td>
</tr>
<tr>
<td>Total NT</td>
<td>1 153</td>
<td>100</td>
<td>1 031</td>
<td>6 805</td>
<td>1 118</td>
<td>169</td>
<td>7</td>
</tr>
<tr>
<td>Canberra</td>
<td>769</td>
<td>100</td>
<td>2 066</td>
<td>5 459</td>
<td>372</td>
<td>141</td>
<td>3</td>
</tr>
<tr>
<td>Total ACT</td>
<td>769</td>
<td>100</td>
<td>2 066</td>
<td>5 459</td>
<td>372</td>
<td>141</td>
<td>3</td>
</tr>
<tr>
<td>Total capital cities</td>
<td>13 739</td>
<td>48</td>
<td>29 023</td>
<td>103 826</td>
<td>646</td>
<td>180</td>
<td>4</td>
</tr>
<tr>
<td>Total regional</td>
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<td>52</td>
<td>45 141</td>
<td>178 817</td>
<td>652</td>
<td>116</td>
<td>4</td>
</tr>
<tr>
<td>Total Australia</td>
<td>39 131</td>
<td>100</td>
<td>72 664</td>
<td>282 692</td>
<td>554</td>
<td>138</td>
<td>4</td>
</tr>
</tbody>
</table>

Base: All visitors aged 15 years and over.
Figures may not add to the total due to rounding.
The number of visitors do not sum to the total as visitor numbers are calculated as net visits. See Carter and Collins (2005a) for more detail.
Expenditure excludes major purchases such as motor vehicles.
Total Australia includes small amounts that cannot be allocated to a particular state/territory.
a. For Queensland, capital city includes the Gold Coast.
b. Regional areas in each state/territory, except for Queensland, include all regions in that state/territory except the capital city. In Queensland, the regional area includes all regions except Brisbane and the Gold Coast.
c. Estimates for Perth are for the Experience Perth tourism region.
d. Estimates for Hobart are for the Hobart and Surrounds tourism region.

Source: R&A expenditure allocation method applied to 2004 and 2005 National Visitor Survey data.

Table 5: International Visitor Expenditure in capital cities and regional areas of each state/territory, year ended 30 September 2005

<table>
<thead>
<tr>
<th>State/territory</th>
<th>Expenditure $ million</th>
<th>Share of Expenditure Per cent</th>
<th>Visitors 1'000</th>
<th>Visitor Nights 1'000</th>
<th>Expenditure per Visitor $</th>
<th>Expenditure per Night $</th>
<th>Average Length of Stay Nights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sydney</td>
<td>4,288</td>
<td>90</td>
<td>2,668</td>
<td>41,671</td>
<td>1,607</td>
<td>193</td>
<td>36</td>
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<tr>
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<td>493</td>
<td>10</td>
<td>631</td>
<td>7,771</td>
<td>856</td>
<td>64</td>
<td>14</td>
</tr>
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<td>Total NSW</td>
<td>4,781</td>
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<td>2,809</td>
<td>49,482</td>
<td>2,762</td>
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<tr>
<td>Melbourne</td>
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<td>100</td>
<td>1,257</td>
<td>12,740</td>
<td>1,096</td>
<td>93</td>
<td>18</td>
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<tr>
<td>Regional VIC</td>
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<td>10</td>
<td>308</td>
<td>3,505</td>
<td>749</td>
<td>64</td>
<td>12</td>
</tr>
<tr>
<td>Total VIC</td>
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<td>16,246</td>
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<td>99</td>
<td>20</td>
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<tr>
<td>Gold Coast</td>
<td>860</td>
<td>10</td>
<td>925</td>
<td>6,792</td>
<td>1,042</td>
<td>127</td>
<td>9</td>
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<tr>
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<td>14</td>
<td>897</td>
<td>9,462</td>
<td>850</td>
<td>80</td>
<td>11</td>
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<tr>
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<td>1,186</td>
<td>13,849</td>
<td>1,348</td>
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<td>12</td>
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<tr>
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<td>29,624</td>
<td>1,480</td>
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<td>14</td>
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<tr>
<td>Adelaide</td>
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<td>100</td>
<td>298</td>
<td>4,333</td>
<td>1,085</td>
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<td>15</td>
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<td>17</td>
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<td>611</td>
<td>12,426</td>
<td>1,756</td>
<td>86</td>
<td>20</td>
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<td>181</td>
<td>2,939</td>
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<td>615</td>
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<td>1,915</td>
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<td>102</td>
<td>1,438</td>
<td>975</td>
<td>69</td>
<td>14</td>
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<tr>
<td>Regional TAS</td>
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<td>77</td>
<td>960</td>
<td>668</td>
<td>83</td>
<td>12</td>
</tr>
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<td>1,338</td>
<td>1,043</td>
<td>74</td>
<td>18</td>
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<tr>
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<td>148</td>
<td>1,055</td>
<td>549</td>
<td>74</td>
<td>7</td>
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<tr>
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<td>930</td>
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<td>300</td>
<td>1,523</td>
<td>1,101</td>
<td>217</td>
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<tr>
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<td>341</td>
<td>2,578</td>
<td>1,188</td>
<td>159</td>
<td>8</td>
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<tr>
<td>Canberra</td>
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<td>100</td>
<td>147</td>
<td>1,750</td>
<td>925</td>
<td>79</td>
<td>12</td>
</tr>
<tr>
<td>Total ACT</td>
<td>136</td>
<td>100</td>
<td>147</td>
<td>1,750</td>
<td>925</td>
<td>79</td>
<td>12</td>
</tr>
<tr>
<td>Total capital cities</td>
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<td>100</td>
<td>4,596</td>
<td>103,791</td>
<td>2,122</td>
<td>96</td>
<td>22</td>
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<tr>
<td>Total regional</td>
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<td>80,973</td>
<td>856</td>
<td>85</td>
<td>16</td>
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<tr>
<td>Total Australia</td>
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<td>5,038</td>
<td>132,764</td>
<td>2,521</td>
<td>96</td>
<td>26</td>
</tr>
</tbody>
</table>

*Base: All visitors aged 15 years and over.
Figures may not add to the total due to rounding.
The number of visitors does not sum to the total as visitor numbers are calculated as net visits: see Carter and Collins (2005a) for more detail.
Expenditure excludes international airfares and major purchases such as motor vehicles.
Visitors who arrive in Australia in transit and remain off the aircraft are included in the estimates.
Total visitor nights in Australia include stopover nights which cannot be allocated to a state/territory, but exclude visito
ights spent in transit with in Australia for which no region of state/territory is specified.
Total Australia includes small amounts that cannot be allocated to a particular state/territory.
a) For Queensland, capital city includes the Gold Coast.
b) Regional areas in each state/territory except for Queensland, include all regions in that state/territory except the capital city in Queensland, the regional area includes all regions except Brisbane and the Gold Coast.
c) Estimates for Perth are for the experience Perth tourism region.
d) Estimates for Hobart are for the Hobart and Surrounds tourism region.

Source: TRA expenditure allocation method applied to 2001 and 2006 International Visitor Survey data.
APPENDIX 2:

Federal government programs applicable for the tourism industry

- **Australian Tourism Development Program (ATDP)**
  The ATDP initiative came from the Tourism White Paper. The ATDP is a competitive merit-based grants program that funds regional tourism projects in Australia. The government extended funding for this program for a further three years in the 2007 Budget by $24.9 million and also provided an extra $10 million for two years specifically for regional tourism development projects in drought affected areas (AUSIndustry).

- **Business Ready Program for Indigenous Tourism** aims to promote indigenous economic development by enabling indigenous people and communities to acquire or develop commercially successful enterprises (AUSIndustry).

- **Indigenous Capital Assistance Scheme (ICAS)**
  Provides culturally appropriate commercial finance and business and mentoring support (Department of Employment and Workplace Relations)

- **Indigenous Self Employment Program (ISEP)**
  Provides business advice and support, financial literacy program and an interest free loan funding (Department of Employment and Workplace Relations)

- **Indigenous Small Business Fund (ISBF)**
  Provides funding for the development and expansion of Indigenous businesses and enterprises (Department of Employment and Workplace Relations)

- **Structured Training and Employment Projects (STEP)**
  STEP can provide flexible financial packages and tailored support to help employers provide quality job opportunities for Indigenous Australians. (Department of Employment and Workplace Relations)

- **Wage Assistance**
  Wage Assistance provides a subsidy to Australian employers who give an ongoing job to an eligible Indigenous job seeker. (Department of Employment and Workplace Relations)

- **The National Arts and Crafts Industry Support (NACIS)**
  The National Arts and Crafts Industry Support (NACIS) program provides direct funding support to Indigenous art centres and arts support and advocacy organisations. The program's overall objectives are to assist art centres to become stronger and to build a more sustainable Indigenous visual arts industry (DCITA).

- **New Enterprise Incentive Scheme (NEIS)**
Assists eligible job seekers to start and run their new, viable small business (Department of Employment and Workplace Relations)

• **Building Entrepreneurship in Small Business (BESB)**
The BESB builds on the Small Business Assistance Program. Aims to foster entrepreneurship, including maximising the growth potential and sustainability of small business through: improving business skills of small business owners and/or managers; providing incubation services to maximise small business growth potential and/or business sustainability; and enhancing the capacity of small business owners and/or managers to access information and advice on government programs and initiatives throughout Australia. (AUSIndustry and DITR)

• **Commercial Ready**
Commercial Ready is a competitive merit-based grant program supporting innovation and its commercialisation. It aims to stimulate greater innovation and productivity growth in the private sector by providing around $200 million per year in competitive grants to small and medium-sized businesses (SMEs) between 2004-05 and 2010-11. A wide range of project activities can be supported, extending from initial research and development (R&D), through proof of concept, to early-stage commercialisation activities. (AUSIndustry)

• **Early Stage Venture Capital Limited Partnership (ESVCLP)**
ESVCLPs will provide flow-through income tax treatment and a complete tax exemption for income, both revenue and capital, received by its partners whether resident or non-resident. (AUSIndustry)

• **Industry Cooperative Innovation Program**
The Industry Cooperative Innovation Program is a merit based grants program aimed at encouraging business-to-business cooperation on innovation projects both within Australia and internationally that enhance productivity, growth and international competitiveness in Australian industries.

• **Pooled Development Funds (PDF) Program**
The PDF Program is designed to increase the supply of equity capital for growing Australian small and medium-sized enterprises (SMEs). PDFs are private sector investment companies established under the PDF Act which raise capital from investors and use it to invest in Australian companies.
APPENDIX 3:

Sustainable Tourism CRC Leading Innovations
Sustainable Tourism Cooperative Research Centre

Leading Innovations

A TOURISM INDUSTRY COLLABORATION BUILDING COMPETITIVENESS
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Tourism is one of the most competitive industries in the world today. It’s also one of the most dynamic and exciting. Australia has always been at the forefront of new and innovative tourism products, however, expertise is rapidly developing in destinations around the world. To remain at the forefront, the Australian Government, major tourism leaders and university based researchers are collaborating to deliver innovations.

This publication reviews innovative approaches to maintain competitiveness for all levels and sectors of tourism, from the running of small family businesses to managing destinations and the natural resources on which they are based.

STCRC delivers these innovations through a creative suite of products, services, technologies, developmental programs and training. STCRC’s unique partnership through the Australian Cooperative Research Centre program means effective new ideas are delivered where they are most needed by a strategic set of industry leaders.
Tourism Satellite Accounts & CGE Modelling

A model path to the future

Australia’s first national Tourism Satellite Account (TSA) was produced by the Australian Bureau of Statistics in 2000 and has been vital in highlighting the contribution that tourism makes to the national economy. STCRC has now produced a suite of TSAs for each state and territory that sum to the national TSA. Each report identifies the contribution that tourism makes to each region in terms of measures such as state output and employment. Internationally, this is the first time that a suite of regional TSAs has been developed consistent with the national accounts.

STCRC has also developed a Computable General Equilibrium (CGE) Model for the Australian economy that has a very detailed tourism sector. This model enables the impact of external shocks or policy changes to be assessed. STCRC is now producing a suite of CGE models for each state and territory using consistent bases that will facilitate comparisons.

STCRC’s economic modeling research provides considerable benefits to industry and government through improved decision making processes and resource allocation across a wide range of areas.

Professor Larry Dwyer, Professor Peter Forsyth & Mr Ray Spurr
www.crctourism.com.au
Festivals and events are fundamental to tourism in many parts of the world. Careful evaluation is necessary to accurately determine the return on these events and to ensure that they remain relevant to consumer needs. However, there has been substantial concern for many years over the accuracy of festival and event evaluations.

Encore provides an easy to use tool that enables event organisers, consultants and other agents to undertake comprehensive event evaluations at a standard accepted by treasury officials. Based on STCRC’s extensive event-related research, Encore modules allow demographic, marketing and economic components of a festival or event to be evaluated.

Encore tools enable organisers to write their own questions for surveys, prepares the data entry template and produces tabular and graphical reports on every question once data are entered into the program. An international version of Encore released in partnership with the International Festival and Event Association allows the user to choose different countries and currencies.

Professor Leo Jago
www.crctourism.com.au
The Federal Government’s Tourism White Paper highlighted the importance of the event sector to the Australian economy. However, substantial focus on events over the past few years tended to overlook the ongoing high yield business event sector. STCRC addressed this shortfall with the National Business Events Study (NBES). The results demonstrated that the sector generates over $17 billion of expenditure per year.

The NBES showed the number of events, and number of delegates per event were the best indicators of how the sector is tracking. New technology developed by STCRC enables key business event venues to export their booking data to a central system at the end of each month. The data are then cleaned and transformed using standard definitions. Venues can then log into the system to obtain information as to how the sector is performing overall and how their particular venue compares to industry averages.

The system is extremely flexible and provides access to information that no single venue could obtain. This system has been pilot tested with Australia’s major Convention and Exhibition Centres.

Professor Margaret Deery & Dr Liz Fredline
www.crctourism.com.au
Tourism associations and organisations across Australia produce a steady stream of analyses and reports on different sectors within the industry. These can be difficult to access and do not provide an overview of tourism industry performance as a whole. State of the Tourism Industry provides an accessible and concise summary of this information with commentary from experts to help interpret how the industry has performed. In its third year of publication, the report enables operators to understand and relate to the myriad of tourism facts and figures.

State of the Tourism Industry places Australian tourism within a global context, examining events and influences around the world that have impacted on the industry. Trends and key indicators within Australian tourism are covered along with detailed sector information and commentary.

The report is proving a useful resource for operators, government agencies, market analysts, researchers and tourism educators. It is also being put to good use by the media, who find it a valuable source of user-friendly tourism data and commentary.
Tourism Yield Indicators

*From meaningless numbers to measurable yield*

The tourism industry’s obsession with visitor numbers has often led to profitless volume. Although many have recognized the need to focus on yield as a key indicator of the industry’s performance, there has been no agreement on how yield should be measured. STCRC’s yield study has helped address this shortfall by exploring and defining measures of yield in terms of visitors, tourist expenditure, finances, economic impact, and sustainability.

The study highlighted that different measures of yield can lead to different prioritisations of market sector performance. Focusing on yield across different tourism dimensions enables stakeholders to develop appropriate strategies for higher yield sustainable tourism.

Concepts of tourism yield and their measurement is used by destination managers, tourism consultants and researchers across Australia. The work has also excited considerable interest in New Zealand; Associate CRC partner Lincoln University is currently replicating the methodology to develop yield measures for the NZ Tourism Ministry.

*Professor Larry Dwyer, Qantas Chair in Travel & Tourism Economics*

www.crctourism.com.au
Many years of ad hoc management had resulted in significant concerns for the sustainability of the Gold Coast tourism industry. Issues including impact of visitor numbers on the local population and environment, an ageing infrastructure and new, more competitive destinations had proved difficult for key stakeholders to address.

A tourism vision for the future of Australia’s leading tourism destination had proved elusive until STCRC joined forces with Gold Coast City Council and the local tourism industry. Their combined efforts produced the well-received Gold Coast Tourism Visioning process and report leading to substantial organisational and policy redirections.

The core set of values and principals developed within the positive collaboration have provided a solid base to work from. The method developed in the Gold Coast Tourism Visioning project is now being used in other destinations around Australia.

**Professor Bill Falkener (decd.) & Mr Steve Noakes**  
www.crctourism.com.au
Earthcheck for a Green Globe
Benchmarking and certification for sustainable tourism

The international business community’s use of triple bottom line accounting is driving the need for organisations to operate in a socially and environmentally sustainable way. To meet that need, enterprises in over 50 countries are now using STCRC’s internationally patented Earthcheck software.

Earthcheck indicators measure performance in the five key areas of energy and water consumption, waste production, resource conservation and organisational commitment to the local community. Results provide objective, quantitative feedback on activities. The system also delivers reports gauging baseline and best practice levels appropriate to the type, activity, market and location of an enterprise. Performance indicators are used as benchmark figures, which are compared to similar businesses to gauge sustainable environmental performance.

Green Globe, the global benchmarking, certification and improvement system for sustainable tourism has adopted Earthcheck as its sustainability assessment and benchmarking tool.

Green Globe Asia Pacific, an STCRC spin-off company, provides companies, communities and consumers with a path to sustainable performance.

Green Globe Standards underpin the program. The benefits of accreditation include reduced overhead and operating costs, a public commitment to corporate social responsibility values and global recognition of their commitment to sustainable performance.

Professor Ashley Scott, Professor Terry De Lacy & Professor Richard Hyde
www.crctourism.com.au
Green Globe now operates in 50 countries around the world.

The Carribean
The Carribean has embraced Green Globe principals and standards and now has almost 60 certified properties in the region. The entire region is benefiting from the commitment to sustainable tourism through Green Globe.

“Tourism entities in Jamaica have secured Green Globe certification because of the application of environmental standards to their tourism product.”
Caribbean Minister for Foreign Affairs and Foreign Trade

Australia
The City of Melbourne is using Green Globe’s Earthcheck Benchmarking software for it’s very successful ‘Savings in the City’ program. The environmental program is helping 30 city hotels cut energy, water and waste consumption.

“Hotels are the first sector to be targeted by the Savings in the City program, with the hospitality sector – including accommodation and food providers generating up to 18 per cent of all waste in the municipality.”
Sustainable Water Program Coordinator, Sheridan Blunt

China
Jiuzhaigou National Nature Reserve (JNNR) in China focuses on protecting rare and precious wildlife and their habitat, including the Giant Panda. To achieve sustainable development, JNNR is developing and implementing an Environment and Social Sustainability Policy, based on existing legislation and the requirements of Green Globe.

Indonesia
Melia Bali Villas and Spa Resort has been an advocate for environmentally conscious practices for many years. Working with Green Globe, Meli Bali’s environmental policy has an emphasis on items such as purchase policies, employment policies and energy conservation procedures.

India
The Shillim Institute and Learning Centre in India has recently gained Green Globe accreditation, meeting the requirements of the Precinct Planning and Design Standard. The centre evolved from conservation measures to improve and protect the natural environment of the area. These initial goals have expanded into an eco-resort due to open later this year.
Visitor Information Centres (VICs) play a key role in enhancing visitor expenditure in the region. Research found that capturing and harnessing the interest of visitors is key to the activities of Visitor Information Centres (VICs). On average, 13% of visitors to VICs will stay longer and 33% of visitors will take part in more activities than originally planned. However, researchers found that many VIC staff don’t understand the extent or importance of their influence over visitor behavior.

The VIC tool was developed to encourage operators to monitor performance and subsequently introduce strategies to increase their contribution to improving regional yield. Items, which include a questionnaire, a data entry template and a report module enable VICs to collect data from their visitors and then to assess performance on a range of important dimensions. The kit automatically produces reports assessing center performance.

The kit is in operation in hundreds of Visitor Centres around the country. It has helped operators focus on developing strategies to increase performance in building yield. In addition, by monitoring performance over time, they are able to compare their data to that of other VICs.

*Professor Margaret Deery & Dr Dean Carson*

www.crctourism.com.au
Although motels still provide the lion’s share of commercial accommodation in Australia, the majority were built 20-30 years ago and no longer meet the expectations of travelers. Many of these motels are urgently in need of refurbishment but operators often do not know how to meet the needs of the market and commonly have very limited budgets.

Motel Makeover addresses these problems by providing guidance for moteliers on what tourists need as well as advice on achieving cost-effective, profit-maximising renovation programs. The tools can also be applied to the hotel and bed and breakfast sectors. Currently, AAA Tourism is distributing Motel Makeover across the country.

Tourist accommodation operators across Australia are using Motel Makeover to increase profitability by raising the standard of their accommodation. Targeted renovations can lift a motel’s ranking from 3 star to 4 star, which can equate to an increase in average occupancy rate from 59% to around 75%.

**Dr Justin Beall & Associate Professor Linda Roberts**
www.crctourism.com.au
The global tourism industry has recognized that people with disabilities and seniors are an emerging market area and that accessible tourism is a niche experience. However, in Australia there has been an absence of strategy to effectively address the needs of these groups and thus develop available opportunities. STCRC brought together key researchers, academics, industry partners, community organisations and government agencies to successfully set a research agenda for accessible tourism.

The resulting report has been widely welcomed and accepted as the best way forward. By identifying priority areas for future accessible tourism, the agenda has provided a solid framework for interested parties to work within.

The knowledge captured within this research also provides the potential to sell expertise for overseas markets, particularly in the Asia-Pacific. This will include the areas of information provision, universal design, access auditing, total product experience and consulting.

Dr Simon Darcy
www.crctourism.com.au
International and domestic tourists have increasingly sophisticated expectations of their travel experiences. A large number of tourism organisations use face-to-face interpretation in an effort to enhance their product, improve visitor satisfaction and increase competitive advantage. However, many of these operators are uncertain about the key factors underpinning good interpretation programs or how to gauge the performance of their programs.

Developed with widespread industry input, the Interpretation Evaluation tool consists of three versions customized for nature-based, heritage and food & beverage operations. Included are a 5-minute self-completing visitor questionnaire, an easy-to-use computer application for analyzing the responses and a step-by-step manual for preparing reports and presentations.

The kit allows changes and developments within interpretive programs to be easily monitored. The outcomes of multiple face-to-face programs can be assessed over time and across different sites. The knowledge gained through using the tool provides operators with important benchmarks for monitoring and continually improving the interpretive products and services on offer.

*Professor Betty Weiler & Professor Sam Ham*

www.crctourism.com.au
Beyond the key purpose of conservation, national parks and other protected areas contribute significant funds to regional economies. However, measuring the level and impact of contributions had been a long-term problem until STCRC successfully developed and implemented a specific range of modeling, evaluation and analysis methodologies.

The research has proved beneficial across Australia. For example, in collaboration with Conservation and Land Management in Western Australia, STCRC assessed the tourism value of national parks in the Gascoyne Coast Region, home to the Ningaloo Marine Park. The study valued contributions at $127 million in 2003, with visitor figures of around 188,000. The findings and projected figures for increased income and visitor numbers prompted the WA government to invest $8.4 million in the region's parks.

STCRC is transferring this unique approach to a range of important tourism destinations including historical sites and has developed the method into an online Valuing Paces tool kit.

**Professor David Wood & Professor Jack Carlson**

www.crctourism.com.au
Nature-based tourism, including visits to farming regions, is one of the most popular travel experiences for international visitors to Australia. Many farming families are considering improving their income by providing these keen visitors with ‘down on the farm’ experiences, often based around Australia’s unique wildlife. However, the development of tourism infrastructure and skills in regional areas is currently in its infancy.

STCRC’s innovative Farm and Country Tourism on Your Property program helps prospective operators determine whether they have the skills or product likely to succeed in the highly competitive industry. The two-stage program is conducted through field workshops. Stage One enables operators to assess the attraction of their property and region and explores the potential impact of the venture on their family’s way of life. Stage Two focuses on gaining tourism industry skills and building a solid business plan.

During a 3 year national rollout, the program will guide 1,000 prospective agri-tourism businesses through a review of tourism potential. Based on 2006 workshop figures, it is estimated that more than 200 agri-businesses will prove viable.

Dr Karen Higgenbottom, Dr Carolyn Fausnaugh, Ms Rose Wright & Ms Michelle Thompson

www.regionaltourism.com.au
For many, recognition and acceptance of global warming is now closely linked to a personal desire to act. The CoralWatch project enables people to do something tangible. Coral reefs are one of the most temperature sensitive ecosystems on the planet; the increasing frequency of bleaching events appears to be an important indicator of the global warming progress.

CoralWatch has three primary objectives, firstly to raise public awareness of coral bleaching, climate change and other related environmental issues; secondly, to collate a global coral bleaching database through international cooperation and thirdly to provide travelers with meaningful tourism experiences.

At least 600 groups in 80 countries and territories across the world are using CoralWatch charts to assess bleaching, providing essential feedback for analysis. Involved parties include 350 monitoring and research groups, 150 tourism and diving groups and 100 education organisations.

Professor Justin Marshall
www.coralwatch.org
Tourists today rely on the web to provide services and information prior to travel and on their return home. However, there is a gap in information provision at a time that tourists need it most – when they are traveling. Tourists and tourism organisations are set to benefit from innovative technology that quite literally places destination information in the hands of travelers. Tourist Information Voice Systems (TVS) are geography-smart tour guides which provide real-time local tourism information delivered direct to individuals.

Tourists can listen to an audio tour or read the commentary in text-form, view continually updated location maps and discover detail about various points of interest in the area they are traveling through. Two prototypes have been developed, one for smart phones and PDAs and another for bus tours. Tourists traveling in multi-lingual groups can receive commentaries in one of four languages.

STCRC has created this innovation that will allow tourism organizations to provide superior service to travelers while giving location-based and time specific services.

Dr Pramod Sharma
www.crctourism.com.au
Making marketing decisions based on insufficient data can prove expensive for any business. Operators in the tourism industry need to be able to respond quickly to market changes, something that IPAT is enabling them to do. Deciper Technology's Industry Performance Analysis Tool is a web-based solution for gathering and sharing performance data within tourism businesses. It provides instant industry-wide access to real time performance data comparisons, enabling operators to make better informed decisions.

IPAT can gather data on average room rates, visitor numbers, visitor origin, revenue, in fact by any interval variable. The system produces reports on this data by region, groups, business types and sectors.

Key benefits to the industry include allowing tourism operators, industry associations, and regional and state tourism organisations to monitor the health of the industry at local level as well as consolidate results to regional, state and national performance levels.

Dr Dean Carson, Dr Noel Scott & Ms Fiona Richards

www.decipher.biz
Decipher

Instant online tourism data & commentary

Up-to-date relevant information is essential to underpin tourism industry growth. Although a large number of industry data sources are available, it can be extremely difficult to locate and access them in a usable fashion. Decipher has solved this problem by providing instant access to the latest tourism facts and figures and expert analysis through www.decipher.biz.

Decipher, protected by an international patent, is Australia’s largest supplier of tourism industry information, collecting and cataloguing data from over 340 suppliers. This vast resource of facts and figures is easily accessed through sophisticated online search tools that allow users to quickly find and compile relevant information into reports. Additional resources include industry news, case studies and business planning tools.

Decipher’s website has over 1500 users from state, regional and local tourism organisations, small to medium enterprises, corporate companies, industry associations and government departments. Decipher Technologies, a STCRC spin-off company, also operates the Australian Government’s Quality Tourism portal initiative.

Dr Pramod Sharma & Dr Dean Carson

www.decipher.biz
Geospatial Search Application for Tourism - GSAT

Moving in a different dimension

GSAT delivers a great new level of entertainment and excitement to itinerary planning and travel decision making. With GSAT, online explorers can zoom around destinations using web-based mapping systems such as virtual.earth®. At each destination they can access databases of tourism products, services and related information in any format including text, images, video and sound.

For tourism providers, GSAT can be attached to data warehouses or embedded in tourism wholesalers/retailers product databases to enable search and display. The system allows online travelers to spatially search for tourism products, create itineraries, budgets, access touring routes and more. The information sets can be saved, customized, personalized and shared.

GSAT’s search and display function is currently patent pending.

Mr Luke Latimer & Mr Brad Cox
www.crctourism.com.au
Wildlife Tourism

Walking on the wild side

Wildlife based tourism is worth several billion dollars to the Australian economy, with more than 1300 tourism operators including wildlife as a significant part of their product. STCRC’s wildlife program has been instrumental in the formation of Wildlife Tourism Australia (WTA), a non-profit organisation established to promote the sustainable development of a diverse wildlife tourism industry that supports conservation.

WTA’s major achievements to date include developing of a website as a substantial information resource, running wildlife tourism cooperative marketing initiatives and providing input into government policy development. WTA is playing a key role in boosting the profile of wildlife tourism and encouraging improvements in product quality and marketing effectiveness.

STCRC’s wildlife tourism program has generated over 30 research reports, more than 35 refereed academic publications and the most comprehensive reference book available on the subject internationally.

Dr Karen Higgenbottom

www.wildlifetourism.org.au
Tourism can play a vital role in helping develop sustainable communities, particularly in emerging economies. STRATIS helps reduce poverty in developing communities within the framework of the UN Millennium Development Goals. A partnership between STCRC and leading project management group GRM International, combines STCRC’s research strengths with GRM’s project management expertise.

STRATIS has been commissioned by the Asian Development Bank & the governments of Cambodia and Vietnam to undertake the implementation of the Mekong Tourism Development Program. Additional ongoing projects include the development of a Master Plan for Tourism in Fiji and the Maldives as well as assisting the Government of Thailand in post-tsunami tourism recovery projects.

Through project management and “best practice” tourism applied research, planning and development, STRATIS continues to achieve real tourism outcomes of economic, environmental and social significance for clients in Asia Pacific and beyond.
In recent years, Australia’s international pre-eminence in hospitality and tourism studies has led to the establishment of a wide range of educational programs at numerous tertiary institutions. THE-ICE is a government funded initiative providing an umbrella under which institutions can pool their distinctive expertise to benefit hospitality and tourism students, both in Australia and internationally.

By benchmarking educational standards amongst its members, THE-ICE provides best practice educational methods informed by leading international research. Strong industry links and collaborative marketing of educational products presents domestic and international students with options designed to meet their specific needs.

THE-ICE enables effective transference of regional specific expertise in tourism and hospitality to add value to existing and proposed educational programs both nationally and internationally. A well integrated network across THE-ICE consortium further enhances the quality and applicability of innovative research crucial for the future development of this rapidly expanding industry.

Professor Perry Hobson, Ms Pauline Tang & Ms Rachael Lee
www.the-ice.org
STCRC has recognised the need to foster sustainable tourism researchers from graduate level. This has been achieved through STCRC’s Education Program, which offers full joint, industry and supplementary scholarships to full-time PhD students enrolled in partner institutions. The program’s diversity has enabled support for a variety of sustainable tourism topics in engineering, technology, ecology, social science and business.

The education program has also developed a strong Career Development Workshop, offered to PhD students twice a year. These workshops assist with research and career skills but importantly, help continue to build a strong network of researchers working in this area. In addition, the program has implemented travel grants and an award for excellence scheme.

Since inception, STCRC’s Education Program has awarded over 190 scholarships to PhD students. The scholarships are competitive and all recipients are of exceptional academic quality. The success of the program can be marked by the fact that 57 students have already completed their PhD.