

## Submission to QLD Action Plan for Tourism Recovery

To the Tourism Industry Reference Panel

On behalf of The University of Queensland, Griffith University and the University of the Sunshine Coast, we wish to offer this submission to inform the Queensland Action Plan for Tourism Recovery.

We have come together as universities teaching and researching in tourism, hospitality and events to provide you with our combined thoughts and suggestions relating to the opportunities and challenges that we have collectively identified as being most pertinent to helping tourism recovery in Queensland. Australia's tourism university research is world leading. Griffith University and The University of Queensland are ranked #1 and # 2 in Australia respectively, and globally are top ten institutions for tourism and hospitality, according to the 2021 Shanghai Global Ranking of Academic Subjects. In its most recent rankings, the Australian Research Council gave both The University of Queensland (UQ) and Griffith University (GU) the highest ranking of 5, indicating that our tourism research is well above world standard. The University of the Sunshine Coast (USC) was placed 26<sup>th</sup> and GU 38<sup>th</sup> out of over 1,000 universities in the 2021 Times Higher Education Impact rankings of universities, the only global performance tables that assess universities against the United Nations' 17 Sustainable Development Goals. Collectively across the three universities there are 58 tourism academic researchers and 57 PhD researchers who could provide a significant resource to help inform and support Queensland's Action Plan for Tourism Recovery.

Please note that throughout this submission we have provided links to supporting documents that might contribute to a more in-depth understanding of key points or examples of projects (refer to blue text hyperlinks).

We present our ideas under the headings provided in the terms of reference document, as follows:

1. Changes in consumer demand and emerging market opportunities.
2. Enhancing tourism management and Queensland's brand positioning against competitor destinations, as both a State and destination-specific brand.
3. Improve and broaden the measures of tourism success.
4. Enablers of tourism growth, including skills, infrastructure and technology.
5. Supporting a smart green aviation recovery in Queensland as well as other transport options.
6. Opportunities for new products and experiences, including shovel ready projects capable of spurring investment, rejuvenation and visitation.
7. Opportunities for events to drive visitation, including to regional areas and during off-peak periods.
8. Opportunities for Queensland to increase its share of international education.
9. Further suggestions: Resilience, sustainability and social license.
10. Mobilising the university sector.

## **1. Changes in consumer demand and emerging market opportunities**

In the domestic tourism market, now is a time to implement behaviour change and reverse the trend of more Australians travelling overseas than holidaying at home. We need to take a deep dive into the motivations of Australians, understand the viewpoint of stakeholders in the domestic industry and co-create a new domestic tourism future for Queensland. Our recommendation is to draw upon research that informs behavioural change in social marketing and implement a program of projects that creates a new future for the domestic industry in Queensland to capitalise on the closure of international borders.

Research to better understand the strategic strengths of a domestic holiday and the appeal of destinations in Queensland (in comparison to overseas competitors, particular short-haul destinations, such as Bali, Fiji and New Zealand) is needed.

Finding ways to increase the visitor spend on domestic holidays and to embed the habit of holidaying at home in contemporary Australian culture are also needed.

Building experiences, informed by research, that appeal to domestic visitors and gets them to invest in a hosted experience, for example, a guided walk through a National Park, a canoeing tour down a river, getting a specialist instructor to teach the kids to surf, etc. needs to become part of our domestic holidaying culture in Australia.

Providing opportunities for operators to learn about quality and environmentally and socially sustainable service is important.

## **2. Enhancing tourism management and Queensland's brand positioning against competitor destinations, as both a State and destination-specific brand**

A review of the role of Destination Marketing Organisations (DMOs) and government at the local, regional, state and national levels is needed, to consider a 'new' model for destination marketing and management that better fits this new era of tourism. Traditionally, DMOs have focused on marketing but they play a significant role in leadership and coordination within destinations. As part of the COVID-19 recovery and adaptation to issues such as climate change, these organisations will increasingly play a role in advocacy for the industry and destination management planning and policy making. Accordingly, the leadership role of these organisations and their skill sets need to shift to meet the needs of the industry in this changing environment to be more policy and industry/infrastructure development orientated.

The disruption of the sharing economy will result in more micro-businesses in the industry moving forward. These tourism operators will market themselves through large multi-national platforms, such as Airbnb, and accordingly, their integration into the tourism ecosystem and how they work with DMOs and government as well as contribute to the overall destination offering needs to be considered.

It is important to identify champions and leaders in the industry who can motivate others to collaborate. Research on tourism clusters, including for sustainability, suggests that the success of the cluster is often driven by the individuals rather than the firms they represent. These individuals must have passion and commitment to the destination. Developing new ways to identify and assess the potential of individuals to contribute to destination clusters and collaboration is needed. Furthermore, often members of the regional DMO can get lost in

the crowd (with lots of members), therefore developing smaller clusters of organisations within a region (e.g., adventure and youth tourism, food and wine tourism, etc.) can provide greater focus for collaboration and operators can improve their connections with each other in this small network. Development of these clusters and then the network of regional clusters across Queensland to improve knowledge sharing should be considered as part of the Action Plan for Tourism Recovery.

Building horizontal and vertical linkages is important for innovation. That is, horizontal linkages with others at a similar level in the tourism ecosystem (e.g., between tour operators in a destination), as well as vertical linkages, both upwards (e.g., a tour operator with the regional DMO) and downwards (e.g., a tour operator with a local food producer). Thus, forums and grant funding that encourages this collaboration is needed, rather than individual businesses applying for individual grants.

A strategy and campaign engaging both industry and visitors to address the pervasive and persistent risk to the Great Barrier Reef – a key drawcard for visitors to and within Queensland – is urgently needed. This can be supported by addressing another critical area, to find ways to reduce operating costs, resource consumption and emissions by tourism operators (e.g., reduce waste and the use of energy, air-conditioning, water, etc.). This can draw and expand on Queensland Government programs such as the ecoBiz scheme and the decarbonisation program with resort operators and islands on the Great Barrier Reef. It is also important to set targets and provide incentives and marketing opportunities for eco-accreditation. The Griffith Institute for Tourism has undertaken research to explore how [socio-cultural characteristics might shape the perception of under-water GBR beauty](#) could be extended to understand ways to manage and market this important tourism asset.

Innovative product development, management and marketing can be enhanced using existing and emerging technologies. USC is currently exploring real and virtual immersive experiences in wildlife and nature-based tourism experiences, key motivators for visitation to Queensland. Increasing understanding of the thought processes, cognitive responses (appraisal of emotions such as awe) and the behavioural outcomes of visitors can influence and encourage environmentally responsible behaviour and support the development and promotion of sustainable tourist destinations, both in real and virtual immersion. Such research can inform decision making, product development for diversification, raise awareness of cultural and environmental issues/opportunities and enhance visitor engagement.

### **3. Improve and broaden the measures of tourism success**

Environmental and social responsibility is a pertinent issue for the tourism industry and the need for more responsible, regenerative and ethical tourism should be a priority to the new strategy. Furthermore, addressing and responding to climate change to increase the resilience of the sector, reducing emissions (due to high tourism exposure and negative impacts) and finding better ways to measure, monitor and manage sustainability is critical now and to future proof the industry. Research on the [carbon footprint of tourism destinations in Queensland](#) provides an example of the type of evidence-based assessment that should inform future strategies and programs. This type of assessment has also been conducted at the

business level, for example, [Lady Elliot Island Eco Resort's transition to 100 per cent renewable energy](#).

Development of new models to measure the broader impacts and benefits of tourism to include social and environmental indicators is needed to achieve a sustainable future and deliver on social licence. Austrade commissioned a new indicator framework for Australia's Visitor Economy, recognising the current approaches to performance are limited in scope and need to change, to ensure what is being measured is fit for the future. The resulting report and recommendations that were prepared are provided as Appendix A, and it is recommended that a broader indicator framework be considered and taken forward in Queensland to align with the new Tourism Strategy. It should also consider other relevant strategic priorities for Australia (illustrated on p10 of the report) and the United Nations Sustainable Development Goals, which Australia has committed to as a Member State.

#### **4. Enablers of tourism growth, including skills, infrastructure and technology**

Led by the Government and with support from the industry, we need to understand the career and work aspirations of young people and create pathways to make a career in tourism, hospitality and events the career of choice for young people. Greater connectivity between the universities and other education providers with the industry through involvement in program and course design, industry-based placements and networking events between students and potential employers is needed.

Given that small and micro-businesses employ 90% of the tourism workforce, training to encourage young people to develop skills in small business management and entrepreneurship and incentives to get young people to start up new businesses in these sectors of the industry are needed. This will be particularly important to foster new experience development and reinvigorate the industry given the exit of businesses as a result of the pandemic. Quantifying and then promoting opportunities in specific careers in these sectors where there are skills shortages is important to ensure young people understand the prospects in tourism, hospitality and event careers. Highlighting the benefits of lifestyle and opportunities in regional areas is important to attract young people to these areas, particularly in early adulthood. This also links to the small business opportunity and connects with developing a lifestyle around a tourism career. Promoting tourism as a career, rather than a job on the way to something else, is necessary to achieve long-term commitment to the industry and to build a skilled workforce. UQ has helped the industry to design tourism employment plans for remote parts of Australia, [including Queensland](#). These plans could be updated, especially in light of the new [Work in Paradise Campaign](#) released by the Queensland Government.

Digital upskilling for businesses is needed. Research from GU to inform the [Queensland Digital Tourism Workforce Development and Training Plan](#), found that most operators rated their organisation and their own digital literacy 3 out of 5, highlighting the need for training to improve the industry-wide level of digital literacy. While operators were using websites and emails very frequently to market their business, they were only posting stories and videos on social media and responding to online reviews occasionally. They rarely used paid social media advertising, posted blogs or used mobile text messaging in their marketing efforts. Of

those with bookable product, only 82% offered direct bookings on their website and 71% showed live availability. Only 12% were using Big Data, 5% virtual reality and 4% augmented reality in their business.

It is evident that, while most operators have at least basic social media and website skills, tourism operators often lack the skills to identify technology options to solve their problems, engage consultants and manage the development process to introduce new technology in their business and evaluate the risks associated with new technology adoption. Accordingly, providing training, mentoring and capacity building to support operators to embark on this innovation journey would improve the uptake of digital technologies. Furthermore, working with universities to embed digital literacy in the curriculum is another way to build this capacity in our industry.

University researchers are working on new and innovative ways to use Big Data to understand visitor movement, map travel behaviour and measure sentiment. These new technologies need to be integrated with traditional data sources, such as the international and domestic visitor survey data, to provide new insights for the Queensland tourism industry and help business and destinations identify market opportunities and better ways of doing business (for example, to achieve sustainability goals, target new markets, etc.).

## **5. Supporting a smart green aviation recovery in Queensland as well as other transport options**

The image and reputation of Queensland's aviation network are going to become increasingly important to manage as consumers become aware of the negative impacts and associated costs of air travel and resulting impacts on protected areas such as the Great Barrier Reef. Aviation has also been heavily impacted by COVID 19 and has had significant government recovery support for business as usual, but there has been limited support to innovate and create more (economically, environmentally and socially) sustainable models, despite global pressures and changes in consumer preferences. The industry needs support to be proactive in redesigning itself for the future, and Queensland has some leading examples that it could shout about – both through airlines testing biofuels and going electric, to airports leading on carbon neutrality. Beyond 'network improvements', we need to ask how we can support better and more efficient operational practice, including electrification and use of renewable energy and fuels across the aviation network, to demonstrate leadership internationally and ensure our aviation sector is resilient. All airports should be encouraged to incorporate and monetise renewable energy and to be accredited under the [Airport Carbon Accreditation Scheme](#), working through the ratings towards carbon neutrality.

More pervasively, extending this goal beyond aviation to other transport modes such as extending the EV charging network, and an all-inclusive strategy to transition the transport and tourism industry to develop and offer carbon-neutral holidays to Queensland, in an extension of work already under way, should be a goal of this strategy.

## **6. Opportunities for new products and experiences, including shovel ready projects capable of spurring investment, rejuvenation and visitation**

Tourism provides a means to encourage economic participation and deliver cultural and social outcomes for Indigenous people and all Queenslanders. Stakeholders seek a more engaged, integrated and inclusive approach to Indigenous tourism and participation of Indigenous people in tourism. Capacity building and understanding are paramount. Collaboration with local Aboriginal stakeholders (not segregated or add-on), facilitated reconciliation and knowledge sharing and incorporating Indigenous interpretation into tourism are needed. We should seek to draw on traditional knowledge to better manage our natural resources upon which so much of our tourism is based. UQ and GU have been integral to the development of the [Queensland First Nations Tourism Plan 2020-2025](#).

Tourism experience development is a vital aspect that will shape and change the industry over the next 10 years. It is evident that the industry understands that authenticity is key to providing world-class experiences to our visitors. Providing a framework for operators to understand authenticity and how to create it is therefore needed. There is also a need to promote Queensland's food and beverage experience offerings. Opportunities to assist primary producers, such as oyster and berry farmers, become part of the tourism industry is evident. Engagement with the agricultural sector is crucial. This would enable them to provide value-adds to their products and increase their revenue, while also contributing to Queensland's tourism offering and economic contribution. Farm experiences, tastings, farm-gate experiences and the development of produced-based souvenir offerings are key opportunities in this area. UQ and three regional universities are part of the Rural Economies Centre of Excellence ([RECoE](#)), working on regional tourism research funded by the Department of Agriculture and Fisheries (DAF). The Queensland [COVID Unite and Recover: Economic Recovery Plan](#) outlines funding for agricultural diversification, including tourism which should be explored with DAF.

Accessible tourism is an opportunity to deliver high value and high growth visitors to the tourism industry. With the ageing population, accessibility is of growing importance and should be a priority.

As part of the pandemic recovery, key areas that need to be considered as part of this plan are digital health passes, touchless travel experiences using digital identification via facial recognition, digital luggage management, mobile robot chatbots to automate visitor experiences and the Internet of Things (IoT) to network objects via sensors and other devices that gather information to improve and personalise the visitor experience. Explanations and examples of these technologies are provided in the [Queensland Digital Tourism Workforce Development and Training Plan](#).

## **7. Opportunities for events to drive visitation, including to regional areas and during off-peak periods**

Regional dispersal should be a specific pillar of the Action Plan for Tourism Recovery and needs to have a dedicated strategy to communicate the value of regional travel. Encouraging travel to regional areas and developing itineraries into the regions should be a priority. This also presents a great opportunity to activate [short-haul electric aviation](#).

Reform to the regional tourism development grant programs and improving the measurement of regional statistics is critical to improving outcomes of regional tourism destinations. Several schemes under the COVID Unite and Recover: Economic Recovery Plan provide opportunities for regions, including the Building Acceleration Fund and the Roads of Strategic Importance early works package.

Having robust and reliable data to inform regional tourism planning, marketing and decision-making is needed. The sample size and methodological approach of the current national and international visitor surveys often provides insufficient data for regional tourism destinations. Improving the data and regional visitation modelling through primary data collection, integration of data sets and use of Big Data needs to be addressed. Furthermore, understanding existing data sets in regional destination and integration and access to data to identify opportunities and inform tourism planning and investment is critical. Helping regions to understand data, create better models and interpret data could be a key role played by the universities to build capacity in the regions.

Events and festivals provide opportunities to attract tourists to regional areas, especially in off-peak periods. Additionally, there is currently no available evidence to inform how major events and the development of event portfolios should be optimally managed to attract visitors to regions. Further, in response to COVID 19 in respect of safeguarding the health security of event participants and staff (during events), ensuring the quality of the event experience in light of physical distancing and other mandated restrictions and supporting event and festival organisers to make timely and informed business decisions in the pandemic and post-pandemic environment.

## **8. Opportunities for Queensland to increase its share of international education**

As noted, Queensland's tourism university research is world leading. Queensland has a significant opportunity to export its tourism best practice, knowledge and expertise to other destinations around the world, particularly developing destinations in the Asia-Pacific. There is also an opportunity for export study tours that would bring international operators to Queensland to learn from our world-class industry. Opportunities for business matching and partnerships to help developing countries build their tourism industries and provide knowledge-export opportunities for tourism operators is a potential opportunity, particularly in destinations such as Indonesia, Sri Lanka and the Pacific Island nations. We need to capture and package these opportunities to make tourism an export industry, beyond just hosting international visitors on our shores.

The international student market is particularly important in driving our recovery from the pandemic. Research highlights the importance of the international student market. The tourism industry needs to work closely with the international education sector to develop a world-leading offer for international students when international borders reopen. This offer should highlight the total experience of studying, living, working and holidaying in Queensland. Integration of the offering and making it easy and safe to travel as part of an international study experience is needed. Consideration of the relationship between international education and the working holiday makers schemes, and associated visa implications, is warranted to encourage extended stays in Australia. Working on graduation

and holiday packages to attract international student families and friends to visit Queensland is also an opportunity with the reopening of international tourism. Encouraging international students to have a long-term connection with Queensland and become regular and repeat visitors is another opportunity. Finding ways to stay connected and in communication with these important visitors will promote this outcome. They can also be our international ambassadors, encouraging others to visit Queensland once they return home. Strategies to achieve these outcomes should be part of the next long-term tourism strategy.

## **9. Further suggestions - climate change, resilience, sustainability and social licence**

The impacts of climate change, extreme weather and natural disasters (and other aspects of resource degradation) will have increasing impacts on tourism, its destinations, natural assets and affect the operations and viability of tourism businesses. The [Queensland Tourism Climate Change Response Plan](#) that was funded by the Queensland Government is a critical document that sets out recommendations that should be incorporated into the new tourism strategy. The science is clear; intensifying climate change poses a [significant threat to Queensland's iconic natural assets](#) including beaches, wilderness areas, national parks and the Great Barrier Reef.

Improving the preparedness of tourism businesses and visitors for natural disasters, most notably cyclones, forest fires and drought, is vital. Our recent research suggests that there needs to be a better understanding of the impacts of these events on communities and business to enable them to better respond to and recover. A major natural disaster, particularly when it affects major destination drawcards, is devastating for the surrounding tourism region. The [Binna Burra Lodge bush fire event](#) that destroyed the Lodge in 2019 is an excellent example of these impacts. This is also clear demonstration of how to build back better and increase preparedness for the future.

We found this type of disaster causes disorientation of communities and tourism stakeholders, but, on the other side of the disaster, there is a major opportunity to reorientate and reimagine the visitor experience (real and virtual). Frameworks and processes to help communities manage this process are needed. Connectivity between stakeholders in the lead-up to disaster events is also paramount. Work to develop these relationships as part of resilience preparation is needed. Furthermore, training in public relations management is vital.

Insurance for tourism properties, given increasing disaster events, is problematic and should be addressed as a priority in the strategy. Businesses require insurance to support rebuilding and recovery following a disaster. However, insurance is becoming increasingly expensive and difficult to obtain, particularly in northern Queensland. The threat of sea-level rise and changing weather conditions is also a central issue for many tourism businesses. Industry research has revealed the impacts of rising sea levels on coastal caravan parks and more windy days impacting the number of days boats can operate in coastal regions including the Whitsundays and on the Sunshine Coast.

Social licence to operate is a major imperative of the industry to ensure community and political support for tourism. The Griffith Institute for Tourism was commissioned by



Tourism Australia to undertake social monitoring of the Australian community. This type of research and monitoring must continue to ensure we have an accurate gauge on the “mood of the nation” towards tourism and can develop appropriate advocacy strategies to ensure tourism is viewed as a positive driver of economic, social and environmental change and delivers benefits to the communities in which it operates.

Technology-enabled visualisation of tourism hotspots (and sensitive regions where broad visitation poses a threat) and environmental monitoring technology should be further developed and utilised to better manage the impacts of tourism on environments, communities and destinations. The use of citizen science approaches to engage users in mapping and monitoring environments could form a vital source of data for these outcomes. Development of Smartphone apps to support this data collection and guide behaviour is needed. There is also significant scaling up capability in terms of digital blueprinting for the future economy e.g. cryptocurrency/blockchains given the presence of platform start-ups such as TravelByBit. Finally, greening supply chains as pathways for the aviation industry to create sustainable alternative fuel products can be utilized to enhance the social licence of air travel.

## 10. Mobilising the university sector

Both Australian and international rankings highlight our Queensland-based universities as world leading. We note in the terms of reference that the Industry Reference Panel will “*guide new research, facilitate industry engagement and work with the Queensland government to deliver the plan.*” Queensland-based universities have considerable expertise and knowledge in tourism, hospitality and events, which can be mobilised to inform, implement and evaluate COVID-19 response activities. World leading researchers in tourism crisis recovery are also based at Queensland universities.

Queensland universities have previously worked with industry associations (e.g. QTIC), destination marketing organisations (e.g. TEQ), local, state and federal governments and tourism operators to provide evidence and data to inform and support policy and practice. However, these research activities have largely lacked co-ordination and scale. A vehicle, such as a Queensland Tourism Knowledge Hub, is urgently needed to coordinate research and development activities for tourism. This program could help solve industry problems and provide vital funding to support the research and development needs of industry and ensure that the industry remains world-leading, competitive and sustainable over the next 10 years. The training and education outcomes of such a hub would also deliver the next generation of world-leading scientists and researchers that are vital to the success of this strategy and our industry in the recovery from the pandemic and in the longer term.

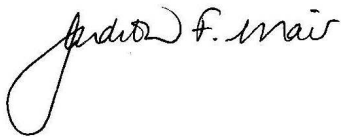
Coming out of the global financial crisis, the [2009 Jackson Report](#) identified the opportunity to “*develop a high-powered national research capability focused on tourism industry development, to complement the existing capability in demand-side research and statistics.*” The development of original research, and importantly the translation and dissemination of research to inform government policy and industry practices and innovation were noted as being essential. A sustainable funding model to support tourism research was argued for at this time, especially in the context of the closure of the Sustainable Tourism CRC. Many of

the recommendations of the Jackson Report were implemented to support the development of the National Long-Term Tourism Strategy.

It is timely in this current crisis to revisit this recommendation and consider concrete ways to mobilise, co-ordinate and align the vast research capabilities located in Queensland universities to support the industry. Other sectors, such as agriculture, have mechanisms in place to support research and development (e.g., [rural development corporations](#)). Universities are increasingly being [incentivised](#) via funding mechanisms to partner with industry and government. Queensland is best placed to lead the way. Partnering with the university sector could not only support Queensland's tourism future at this crucial point but may provide a role model for other states and the Federal Government.

We congratulate the Queensland Government for undertaking consultation to develop this new action plan for tourism recovery and we thank you for the opportunity to provide this submission to inform the strategy. We welcome further opportunities for involvement in the new tourism strategy and indicator framework, both in terms of development and implementation.

Kind regards,



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*And on behalf of:*

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## **Appendix A: A New Indicator Framework for Australia's Visitor Economy**

# A NEW INDICATOR FRAMEWORK FOR AUSTRALIA'S VISITOR ECONOMY

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*Measuring to manage and  
shape the future of our  
Visitor Economy*



# Executive summary

*Tourism is important beyond its economic value. Done well, it can bring many benefits to communities and the environment, but done poorly it can erode the very basis of its existence. Getting it right, is therefore critically important for all Australians.*

The anticipated growth projections for the Visitor Economy bring considerable economic and socio-cultural opportunities, but also increasing social and environmental pressures – with some destinations becoming over crowded and available resources becoming scarce.

Current performance measures are narrowly focussed on the economic benefits and achieving a balance between supply and demand. As a result they have a tendency to measure past performance – limiting understanding and preventing the wider impacts for society and the environment to be understood. This limits the information available for assertive forward looking decision-making and policy action.

**The current approaches to performance measurement need to change, to ensure what is being measured is fit for the future.** Generating a new indicator framework for Australia's Visitor

## **Did you know?**

*That current tourism performance measures are primarily economic, reviewing past performance, with little prediction and largely ignoring other important industry and societal considerations.*

Economy will build on the current suite of measures, allowing a broader range of issues to be considered, and help in identifying and directing the policy levers required to enact change to realise our full potential.

There are a growing number of examples globally where wide-reaching tourism indicators and holistic accounting frameworks have been developed with positive outcomes. Examples include the European Tourism Indicator System, Global Sustainable Tourism Dashboard, Global Destination Sustainability Index, and the United Nations Sustainable Development Goals as applied to tourism.

Whilst Australia has predominantly had an economic focus, there has been research and work undertaken to explore new indicators. There is also work in progress to expand the assessment focus. This includes a project by the Queensland Government to extend the Tourism Satellite Account to include environmental data and a project driven by the New South Wales Government to develop a Visitor Economy Index.

Drawing together a new indicator framework that is easy to use and understand, we can help inspire government and industry collaboration for a more sustainable and competitive visitor economy that benefits Australian communities.



*Measuring to manage and shape the future of our Visitor Economy*

# The importance of performance measurement

*Best practice planning and decision-making requires understandable, concise and accessible information.*

For long-term strategy, this information can be presented as a range of indicators measuring different performance aspects, examining the interaction between supply and demand, and providing a signal for well informed, better targeted policy interventions.

However, to be effective as a policy tool (see Figure 1), the design and choice of indicators is important. Therefore, they need to:

- have a clear purpose aligned with the long-term strategic objectives;
- be sufficiently robust to enable performance to be measured and improved over time;
- encourage accountability through public reporting.

Having the right indicators and applying them in the right way **can then describe prevailing conditions, monitor progress toward key goals, identify areas of concern and inform suitable policy responses.**

A good example of this is the multi-party long-term Great Barrier Reef Sustainability Plan. The identification of the right indicators and regular report cards has led to planned changes in legislation and regulatory frameworks.

Applying these concepts to the Government's strategy for the Visitor Economy, it is critical that a broad range of activities are measured, with clear accountabilities so that appropriate and timely action can be taken.

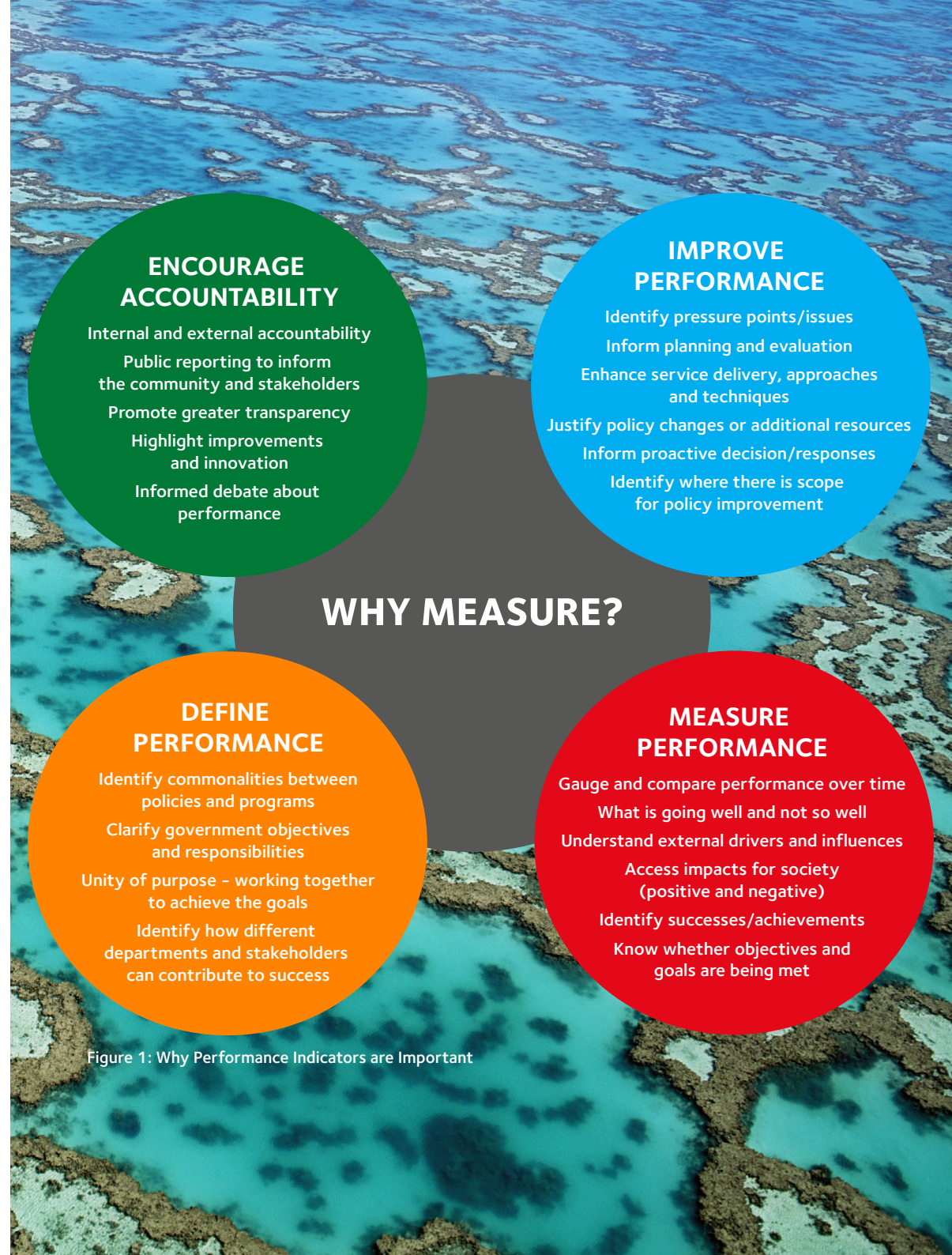


Figure 1: Why Performance Indicators are Important

# A critique of the current approach

*Current measures of tourism’s performance, including the targets set for the Tourism 2020 strategy, are largely volumetric in nature and lagging (focusing on past performance).*

They also have a strong economic leaning and are predicated on a continuous growth scenario, without taking into account the consequences of that growth (Figure 2).

## Risks of the Current Approach

1. **Relying almost exclusively on traditional economic indicators could create serious consequences for the broad-based sustainability of the tourism industry and its long term economic performance.** This includes profitless volume, suboptimal productivity, community backlash and excessive environmental footprints.
2. The heavy reliance on lagging indicators **reduces the opportunity for government and industry to respond pro-actively** to a rapidly changing external environment. For example the ongoing impacts brought about through digital disruption and the rise of the sharing economy.

While the current targets have been successful as they are specific, readily understood and have

INDICATOR	UNIT	TARGET 2020	Mar-19	% OF 2020 TARGET ACHIEVED
<b>OVERNIGHT VISITOR EXPENDITURE</b>				
All sectors	\$ billion	140.0	118.9	69.3
International expenditure	\$ billion	63.4	44.3	49.7
Domestic overnight expenditure	\$ billion	76.6	74.5	93.3
<b>ACCOMMODATION</b>				
Room supply*	Rooms ('000)	151.7	166.2	172.4
<b>AVIATION</b>				
Domestic air capacity	Available seat kilometres (billion)	94.2	87.7	72.2
International air capacity	Seats available (million)	24.8	27.0	126.2
<b>LABOUR</b>				
Tourism employment*	Persons employed ('000)	658.4	646.0	91.8

Note: \* numbers are based on 2017-18 data

Figure 2: Tourism 2020 Performance Indicators

strong buy-in from State Governments and industry, they only demonstrate performance against a narrow set of growth targets largely ignoring other important industry and societal considerations. As a result, they do not provide a **comprehensive assessment of the performance of Australia’s Visitor Economy.**

Australia benefits significantly from a Visitor Economy that is managed well, generates jobs, investment and growth in communities throughout Australia. Therefore, a rethink of the current performance assessment approach in Australia is long overdue. The new ten year strategy provides the perfect opportunity to formulate a fresh and flexible performance measurement framework, that expands on current approaches and is fit-for-purpose and in line with international best practice.

This means that more work is needed to produce **leading indicators that can predict future performance**, to complement the wealth of existing lagging indicators. This could include measuring the exponential rise of digital technologies and the sharing economy which have rapidly transformed travel behaviours – something not detected with existing monitoring mechanisms.

It is important to ensure that these benefits are realised **whilst undesirable effects** on the natural, historic, cultural and social environments are reduced. Deeper insights into the health of the sector are at the core of questions around social license and ensuring the Visitor Economy improves the lives of Australians.

## Did you know?

*That hotels, restaurants and destinations are now basing their future decisions on insights from social media and google search analytics? [e.g. using ReviewPro]*

# A dynamic, forward-looking measurement approach

*The world is changing rapidly and the pace of change looks set to accelerate, but is the Australian Visitor Economy ready for these changes?*

Future strategies need to provide relevant and appropriate policy guidance for the Visitor Economy in the coming years.

Therefore, while straightforward indicators such as yield or market share are important to informing economic challenges, indicators should cover a much broader spectrum of activities, including:

- Political and socio-cultural change;
- Environmental challenges;
- Changing perceptions and expectations;
- New trends and shocks.

This approach requires a framework that captures the impact of key challenges, and is sufficiently adaptable to consider new trends (see Figure 3).

Whilst many of these issues are global in nature, Australia is not sheltered, with a changing world continuing to shape consumer choices, investment decisions, business operations, and competitiveness all of which are vital to the Visitor Economy.



Figure 3: Key Trends and Challenges Toward 2030





Closer to home, visitors and communities are becoming increasingly aware of the negative affects of tourism. Responsible practice is fast becoming an expectation. Issues such as overtourism are taking their toll on individual communities including Penguin Island, Byron Bay and Noosa.

Indicators can monitor the socio-cultural aspects of visitation to help manage destinations appropriately and to avoid community backlash. For example, research has been conducted in Australia to monitor resident sentiment.

**A healthy Visitor Economy is dependent on a quality environment, cultural distinctiveness and social interaction, security and well-being.** These qualities need to be protected and enhanced, with the industry used as a tool to drive regeneration and facilitate appropriate development and conservation while benefiting communities.

Understanding these requirements has seen Visit Flanders in Belgium reposition their strategic framework for tourism, basing it around a flourishing community and destination (Figure 4).



Figure 4: Visit Flanders – Travel to Tomorrow

Despite their importance, these broader public value benefits are generally poorly understood and do not form a part of tourism’s current performance measurement framework. **If not measured, these areas will not be managed, and the sector will not be prepared for the challenges ahead, both known and unknown.**

### ***Did you know?***

*That companies, such as Lufthansa, now include carbon emissions as part of the CEOs KPIs?*

*“Flying shame” - is a growing anti-flying movement that has come from Europe and is a reaction to the large carbon footprint of air travel. Being a long-haul market, Australia is vulnerable to this changing behaviour from international travellers.*

# Principles of an indicators framework

## *Achieving fair and balanced reporting across a range of issues will be critical.*

Economic contribution, prosperity and social and environmental integrity are all of critical importance. Therefore a relatively even distribution of indicators can help ensure **an optimum balance**. Consideration must also be given to the selection of indicators – too many indicators may result in overlapping coverage or contradictory information, leading to policy confusion.

Whilst this is a new way of thinking for Australia, it is not ground breaking globally. Suites of globally standardised indicators which reflect readily measurable performance criteria already exist, including the SO37120 – Sustainable Cities and Communities: Indicators for city services and quality of life. **Examples of broad-based indicator sets or frameworks** that are in use for tourism, include:

- Global Sustainable Tourism Dashboard (Case Study 1 - page 11)
- New Zealand Tourism Sustainability Commitment (Case Study 2 - page 11)
- European Tourism Indicator System (Case Study 3 - page 12)
- Global Destination Sustainability Index (Case Study 4 - page 12)
- United Nations Sustainable Development Goals – as applied to tourism (Case Study 5 - page 13)

Integration and alignment of performance information within and across Government agencies will assist in strengthening its value, and ensuring a common understanding about accountability and delivery of results. This can aid in the process of policy integration across departmental agencies.

The initial indicator framework would build on a core set of indicators **where data and information are already available or could be available in the short-term**. This enables the framework to be delivered quickly, whilst at the same time identifying work streams to address data gaps and indicators that need further development.



## Principles for Performance Indicators

A robust approach to indicator selection is important to ensure they are useful and can inform change. Five key guiding principles to assist with indicator selection for a new indicator framework, are:

1. **Relevant** – reflect what the user is trying to achieve, not simply what is easy to measure
2. **Repeatable and timely** – produced regularly enough to track progress and timely to be of value
3. **Reliable** – produce data that is accurate for its intended use and able to be measured consistently
4. **Credible** – improve public services and be supported by research and stakeholders
5. **Well-defined and understandable** – unambiguous and easy to understand and use, comparable with past periods and providing a benchmark against which future performance can be compared

## Credible performance reporting requires:

- Balanced accounting and fair interpretation, reporting regularly on both the positive and negative achievements;
- Credible information that focuses on the critical aspects of performance;
- Both forward and historical perspectives, with comparative information;
- Explanation of key risks and capacity considerations as well as other factors critical to performance;
- Consolidation of indicators into a consistent output report, so that no single issue dominates to assist with communicating the whole performance story;
- Appropriate interpretation that can be aided by report cards, traffic light systems and spider diagrams.

# Applying an indicators framework to tourism strategies

*Developing a broader framework that includes a balanced set of indicators is critical to transition the Visitor Economy toward a more competitive, inclusive and sustainable model - one that is future-proofed.*

There are a wide range of successful examples and applications globally, along with guidance and direction developed by the UN World Tourism Organisation.

Several examples of more holistic accounting frameworks include:

- Gross Happiness Index in Bhutan;
- Social Progress Index in Costa Rica;
- Well-being framework and budget in New Zealand;
- National Performance Frameworks in Scotland and Wales.

Additionally, some countries, like **Canada**, have started to amend their Tourism Satellite Account (TSA) to include environmental data (e.g. carbon, water and waste).

Tourism agencies are actively seeking to catalyse new ways of 'doing tourism'. For example, the Faroe Islands in **Denmark** organise their tourism sector

## **Did you know?**

*The European Tourism Indicator System was successfully implemented in Sardinia, Italy. An evaluation found that the toolkit can be further improved by allowing it to be more adaptive to new pressures.*

around a "Join the Preservolution" campaign and a four-pillar strategy that focuses on sustainability. Similarly, Visit Flanders (**Belgium**) and its Tourism to Tomorrow strategy builds around positive community impacts and presents measures of engagement and governance.

Such shifts in thinking, parallel innovative approaches to developing new measurement frameworks, that are built on different conceptualisations of the Visitor Economy ecosystem. Progressive countries, such as **Portugal**, drive new ways of measuring tourism using 'Big Data'. While big data is a wide reaching and diverse field, some of these innovations have already been trialled in Australia, including the [Tourism Tracer](#) in Tasmania.

**Industry is already diversifying and broadening its approach to performance measurement, and as a result some governments are in 'catch up' mode.** Examples of tourism companies that are leading the way include Air New Zealand, China Air and Intrepid Travel (Case Study 6 - page13).

As new strategies are being developed, new indicators are continually being introduced. Some recent examples include:

- **The United Nations World Tourism Organisation** is expanding the current range of tourism statistics to cover both economic and social dimensions. This will bridge the UN standards of the TSA with the System of Environmental Economic Accounting through their Measuring Sustainable Tourism Framework (Case study 7 - page14).
- **The South West Tourism Alliance (England)** modelled carbon impacts of different tourism policies to identify how to reduce sectoral emissions alongside growth in value. This resulted in targets to increase visitor expenditure while decreasing emissions (Case Study 8 - page 14).
- **The New South Wales Government** is using a mix of quantitative and qualitative metrics to establish three indices to track industry conditions, industry perceptions and the future industry outlook over time. The three indices will be used to create a composite Visitor Economy Index (Case Study 9 - page 15).

A tourism indicators framework needs to reflect the 'triple bottom line' of **People, Planet and Profit**, to transition decision-making to a more sustainable economic model for the future. As the external environment changes quickly, an indicators solution must be adaptable enough to bring in new data and new indicators as required.

A sound framework needs to be underpinned by both **lagging** and **leading indicators** (table 1).

- Lagging indicators are excellent at assessing past performance in relation to the strategy and its targets, but they offer little insight as to what the future holds in store.
- Leading indicators, are less precise but provide guidance on future trends and expectations, for example Tourism Research Australia's forecasts of visitor numbers and revenue by market.

	LAGGING INDICATOR	LEADING INDICATOR
<b>Timeframe</b>	Retrospective	Forward looking
<b>Purpose</b>	Performance	Planning and strategy
<b>Data Source</b>	Historical data	Often modelling based
<b>Policy Response</b>	Reactive and corrective	Proactive and preemptive
<b>Examples</b>	Visitor numbers, expenditure, employment, airline capacity, visitation to key attractions	Future arrivals, predicted contribution to GDP, forward bookings, sentiment-informed predictions

Table 1: Difference between lagging and leading indicators

Leading indicators in tourism still fall short of producing *predictive* information across a range of issues. Big Data analytics might offer different types of leading indicators, for example visitor or resident sentiment which has been found to be superior in predicting future consumer decisions compared with traditional forecasting.

A new performance measurement framework for future tourism strategies is proposed at Figure 5, which encompasses the integral triple bottom

line elements: *economic, environment and socio-cultural*. This complements the current spend and supply side targets.

The approach differentiates between leading and lagging indicators, recognising the need to utilise both for different purposes. The use of composite indicators that compile individual indicators into a single index or summary indicator are also recognised.

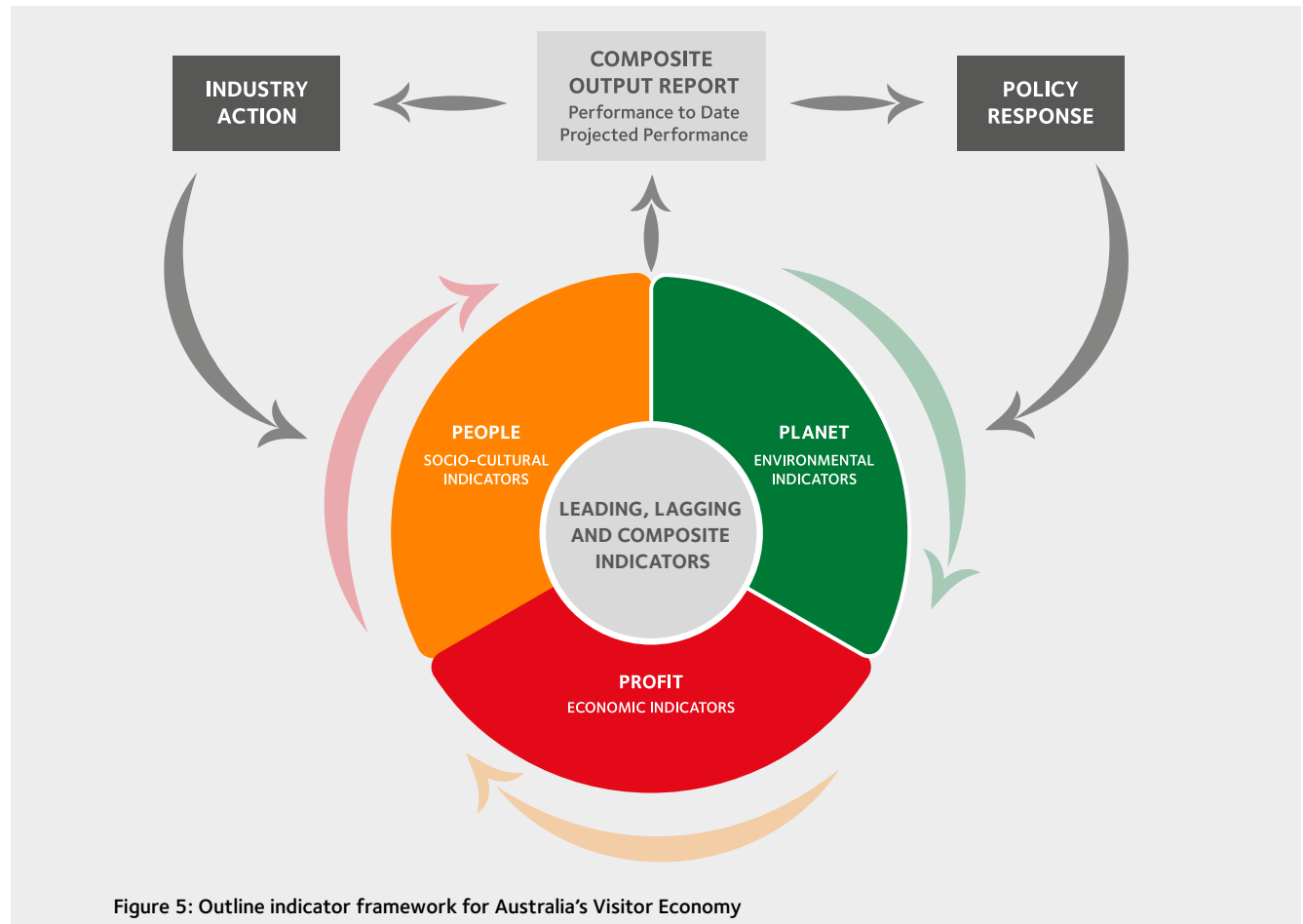


Figure 5: Outline indicator framework for Australia's Visitor Economy

*This approach generates a comprehensive set of consistent indicators for understanding economic and environmental outcomes, while incorporating forecasts for the Visitor Economy at both national and state levels.*

It also aligns with best practice globally, allowing us to understand the dynamic interaction of tourism with wider issues and the rest of the economy. In combination, these allow policy analysis to identify potential challenges for the sector and the economy in advance.

As a starting point, existing innovative and tested socio-cultural and environmental indicators could be adapted for Australia including the Ecological Footprint indicator for tourism in South West England (UK). As tourism interacts with multiple areas of the economy, broader measurement of indicators will need to link with other policy areas – such as transport, border control, climate change, employment and accessibility.

**Engagement of key stakeholders** is an important part of the process for developing and designing a more useful performance measurement framework and indicator suite. This aids in understanding the limitations and opportunities for the various audiences, and how they can be directly engaged in improving and using the outcomes.

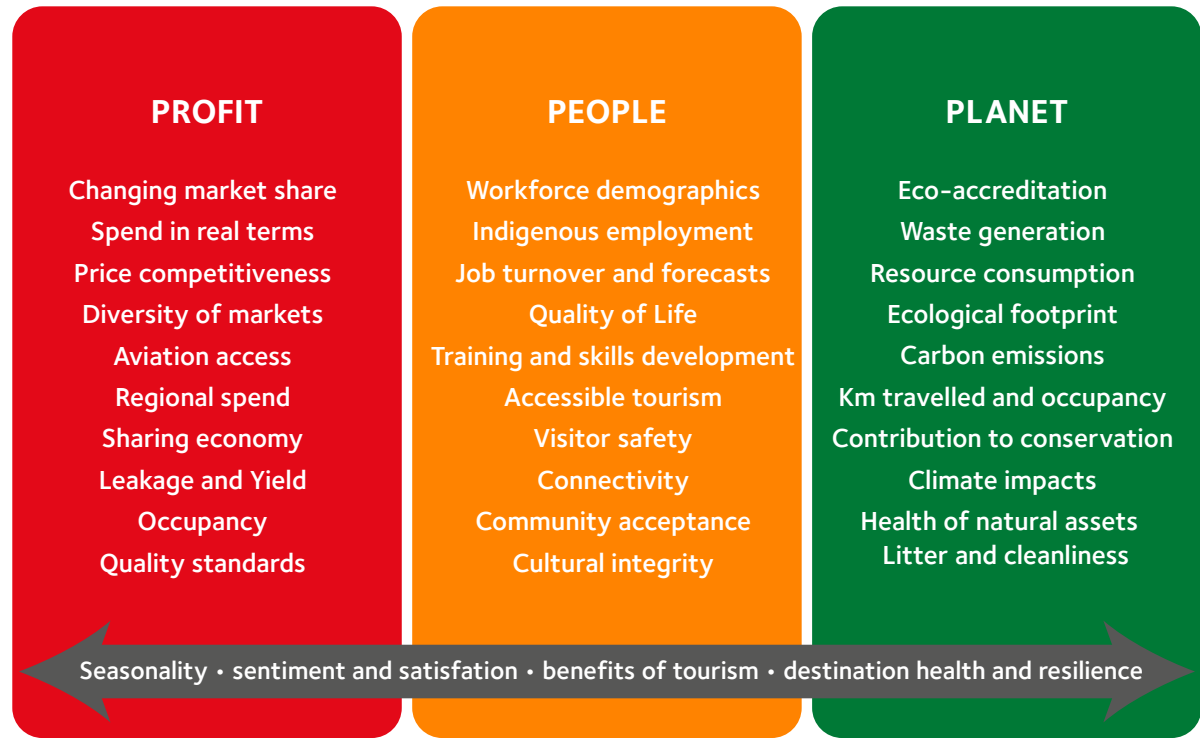


Figure 6: Potential indicators that can be explored for the framework

Subject to consultation and further investigation, Figure 6 illustrates a number of example indicators for tourism. Most of the indicators listed are lagging, so a suite of leading indicators would need to be developed.

Even with a suite of broad-based indicators, there is the risk that more emphasis is given to the economic indicators as these tend to be more easily measured and people are generally more familiar with the meaning of these particular measures. To avoid this, **it is critical that all indicators are monitored and reported collectively**. The presentation of the results will be important

and may involve an overall index or composite visualisation that incorporates all three areas at the aggregate level. However, policy can not be made on aggregate information alone, and the performance reporting of underlying indicators for each of the three pillars must remain.

**For government to assist the tourism industry realise its full and sustainable potential, it is critical that a broad suite of indicators are used to monitor all dimensions of the industry's performance. It should consider a range of issues and how the Visitor Economy feeds into, or performs against national indicators in general.**

# What's Next?

*A new comprehensive performance measurement framework is proposed that positions the Visitor Economy in the context of wider environmental, cultural, geopolitical and social concerns. This follows industry's lead in this area, and the framework would assist both government and industry.*

The framework will assist future Tourism strategies to:

- meets its objectives;
- actively shape and co-create appropriate tourism markets and products;
- ensure policy responses are fit for the future;
- maintain competitiveness;
- understand market failures.

It is recommended that the framework (see Figure 5) should be further developed to align with the future Tourism Strategy.

It should also consider other relevant strategic priorities for Australia (illustrated in Figure 7), and the United Nations Sustainable Development Goals, which Australia has committed to as a Member State.

## What is required?

There are two key stages of work as illustrated in Figure 8. The **first is the detail and design**, to review and identify robust indicators for the framework developed through a consultative process in partnership with stakeholders, including state governments, Commonwealth agencies and industry. This would build on work already done in Australia and extend international best practice, to ensure appropriate and complete coverage. Indicators will be identified in accordance with the principles described, covering the different aspects of the industry and against the three categories of People, Planet and Profit.

The **second stage is implementation**, to develop and deliver the working indicator framework, which would include collating and presenting the data. Although this will build on existing and readily available data, it is likely that adjustments will need to be made to existing processes for data capture, as well as setting up new indicators and data capture mechanisms. Interpretation and reporting, and training delivered to enable effective application and use will also be needed.

## What does good look like?

**A national performance measurement framework with the right balance of indicators is a critical component for creating, nurturing and evaluating tourism in order to achieve better long-term policies and economic growth that is inclusive, sustainable and innovation led. Therefore an appropriate and robust indicator framework that embraces the triple-bottom-line, and comprises both leading and lagging indicators is long overdue.**

*“You can’t manage what you don’t measure”*

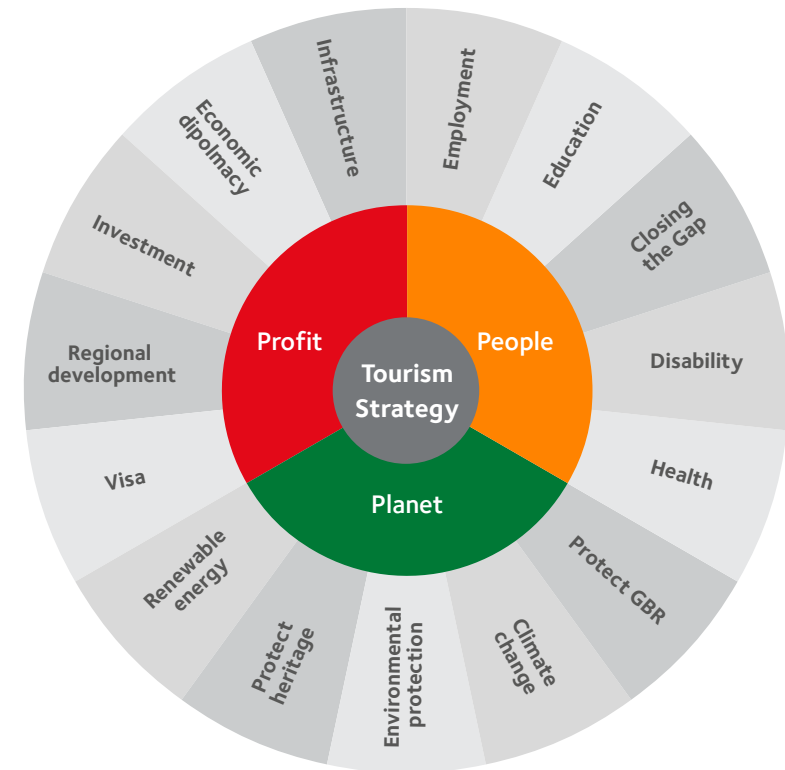


Figure 7: Alignment to Australian strategic priorities

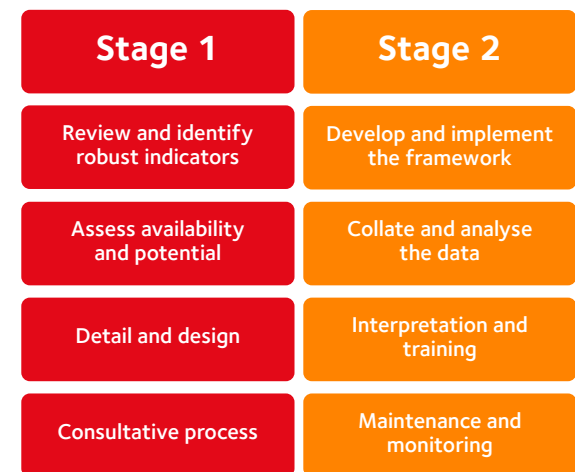


Figure 8: Stages to develop and implement a new indicator framework

## Case Study 1

Global Sustainable Tourism Dashboard

[tourismdashboard.org](http://tourismdashboard.org)

### Purpose:

To share data on tourism's contribution to progress along the Sustainable Development Goals and complement existing economic indicators. The audience is global decision makers related to tourism.

### Metrics:

Poverty alleviation, Distribution, Carbon emissions, Gender equity and employment, World Heritage Areas, Safety.

### Developer:

Griffith University and University of Surrey with support from WTTC, Amadeus and EarthCheck.

### Success factors:

Since 2015, the Dashboard has consistently provided data on core challenges. It is the only tool of its kind globally to facilitate a deeper discussion about tourism impacts. It resonates also with regional decision makers and Governments (e.g. the Mekong Tourism Region, Mexican Government and ICIMOD Himalayas) who see the benefits of the tool in comprehensively measuring tourism. The Dashboard has also been referred to as the 'myth buster' as it reveals some unknown facts about tourism.



## Case Study 2

The New Zealand Tourism Sustainability Commitment

[sustainabletourism.nz](http://sustainabletourism.nz)

### Purpose:

To see every New Zealand tourism business committed to sustainability by 2025 and develop a system to measure progress. The audience is all tourism businesses in New Zealand, as well as visitors who are reassured that the industry is 'doing their part'.

### Metrics:

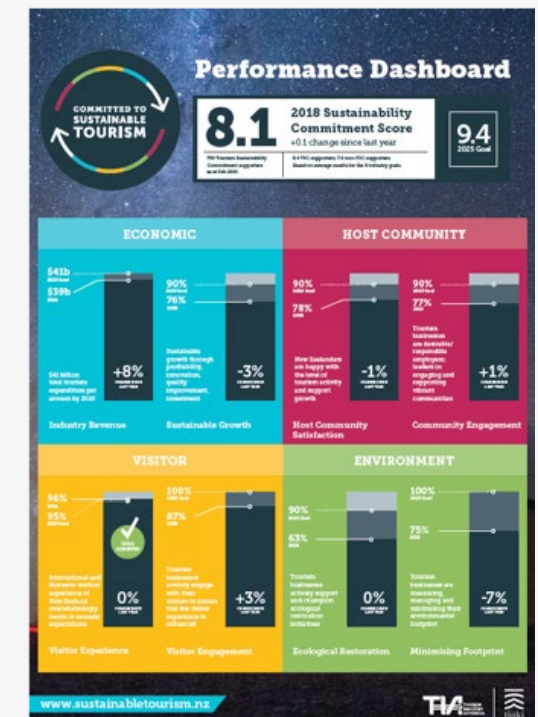
The framework covers all four dimensions of the quadruple bottom line. Across these, industry goals/targets are defined. Operators are required to report against 14 commitments (indicators), and these are reported on in an annual Dashboard. For indicator measures, see: [sustainabletourism.nz/about-us/about-sustainable-tourism-commitment/targets/](http://sustainabletourism.nz/about-us/about-sustainable-tourism-commitment/targets/)

### Developer:

Industry-led by Tourism Industry Aotearoa.

### Success factors:

The Commitment is owned by industry but complements Government strategy. It is purposefully bottom-up and collects data from 1200 businesses in NZ. The underlying idea is to increasingly step up efforts in measurement and reporting to arrive at a collective assessment of the overall success of the industry.



## Case Study 3

European Commissions 'European Tourism Indicator System' (ETIS)

[ec.europa.eu/growth/sectors/tourism/offer/sustainable/indicators\\_en](http://ec.europa.eu/growth/sectors/tourism/offer/sustainable/indicators_en)

### Purpose:

A European wide comparable system of indicators for the Sustainable Management of European Destinations. To help measure and monitor sustainability management processes and performances. Comprising a toolkit and guide to implementation, a final set of indicators were developed after two piloting phases.

### Metrics:

There are 43 core indicators and a range of supplementary indicators. Balancing the need to be comprehensive, realistic and integrated. Indicators are organised into four categories: destination management; social and cultural impact; economic value; and environmental impact.

Section D: Environmental impact		
Criteria	Indicator reference	ETIS core indicators
D.1 Reducing transport footprint	D.1.1	Percentage of tourists and same-day visitors using different modes of transport to visit all the tourists and same-day visitors using low-carbon modes (public transport services to get around the destination)
	D.1.2	Percentage of tourists and same-day visitors using low-carbon modes (public transport services to get around the destination)
	D.1.3	Average travel time by tourists and same-day visitors from home to the destination
	D.1.4	Average carbon footprint of tourists and same-day visitors traveling from home to the destination
D.2 Climate change	D.2.1	Percentage of tourism enterprises involved in climate change mitigation schemes (such as CO <sub>2</sub> offset, low energy systems etc.) and education, resources and actions
	D.2.2	Percentage of tourism accommodation and attraction infrastructure located in sustainable zones
D.3 Solid waste management	D.3.1	Waste production per tourist night compared to general population waste production per person day
	D.3.2	Percentage of tourism enterprises separating different types of waste
D.4 Sewage treatment	D.4.1	Percentage of sewage from the destination treated to at least secondary level prior to discharge
	D.4.2	Water consumption per tourist night compared to general population water consumption per resident night
D.5 Water management	D.5.1	Percentage of tourism enterprises taking actions to reduce water consumption
	D.5.2	Percentage of tourism enterprises using recycled water
	D.5.3	Energy consumption per tourist night compared to general population energy consumption per resident night
D.6 Energy usage	D.6.1	Percentage of tourism enterprises that take actions to reduce energy consumption
	D.6.2	Percentage of annual amount of energy consumed from renewable sources (MWh) compared to overall energy consumption at destination level per year
D.7 Landscape and biodiversity protection	D.7.1	Percentage of local enterprises in the tourism sector actively supporting protection, conservation and management of local biodiversity and landscapes

### Success factors:

There were 60 destinations across Europe that tested the ETIS in the second pilot-testing phase in 2014. The process is led by the destination and is purposefully bottom-up with the destination collecting the data.

Section A: Destination management		
Criteria	Indicator reference	ETIS core indicators
A.1 Sustainable tourism policy	A.1.1	Percentage of tourism enterprises established in the destination using a sustainable policy aligned to international sustainability-related standards (e.g. ISO 26000)
	A.1.2	Percentage of tourism enterprises that are certified with ISO 26000
	A.1.3	Percentage of tourism enterprises that are certified with ISO 26000
A.2 Customer satisfaction	A.2.1	Percentage of repeat visitors within 3 years
	A.2.2	Percentage of repeat visitors within 3 years

Section B: Economic value		
Criteria	Indicator reference	ETIS core indicators
B.1 Tourism flow (volume and seasonality)	B.1.1	Number of same-day visitors per capita
	B.1.2	Relative contribution of tourism to the destination's economy (GDP)
	B.1.3	Daily spending per overnight tourist
	B.1.4	Daily spending per same-day visitor
B.2 Tourism enterprise performance	B.2.1	Occupancy rate in tourism accommodation per month and average for the year
	B.2.2	Percentage of tourism enterprises that are profitable
B.3 Security and quality of employment	B.3.1	Percentage of jobs in tourism that are seasonal
	B.3.2	Percentage of jobs in tourism that are seasonal
B.4 Tourism supply chain	B.4.1	Percentage of tourism enterprises that are profitable

Section C: Social and cultural impact		
Criteria	Indicator reference	ETIS core indicators
C.1 Community/cultural impact	C.1.1	Number of tourism enterprises per capita
	C.1.2	Percentage of repeat visitors who are satisfied with their visit (destination)
	C.1.3	Number of beds available in non-tourism accommodation establishments per 100 residents
	C.1.4	Number of hotel rooms per 100 houses
C.2 Health and safety	C.2.1	Percentage of tourism enterprises that are certified with ISO 26000
	C.2.2	Percentage of tourism enterprises that are certified with ISO 26000
C.3 Gender equality	C.3.1	Percentage of tourism enterprises where the general manager position is held by a woman
	C.3.2	Percentage of tourism enterprises where the general manager position is held by a woman
C.4 Inclusion/accessibility	C.4.1	Percentage of tourism enterprises that are accessible to people with disabilities and/or participating in accessibility information systems
	C.4.2	Percentage of tourism enterprises that are accessible to people with disabilities and/or participating in accessibility information systems
	C.4.3	Percentage of tourism enterprises that are accessible to people with disabilities and/or participating in accessibility information systems
	C.4.4	Percentage of tourism enterprises that are accessible to people with disabilities and/or participating in accessibility information systems
C.5 Protecting and enhancing heritage, culture, identity and assets	C.5.1	Percentage of tourism enterprises that are accessible to people with disabilities and/or participating in accessibility information systems
	C.5.2	Percentage of tourism enterprises that are accessible to people with disabilities and/or participating in accessibility information systems

## Case Study 4

Global Destination Sustainability Index (GDS-Index)

[gds-index.com](http://gds-index.com)

### Purpose:

It is aimed at measuring, benchmarking and improving a destination's sustainability performance aligned to the 2030 Agenda. The audience is all those involved in meeting, event and business tourism destinations.

### Metrics:


Benchmarking evaluates the destination's sustainability performance using 73 indicators across four main areas, namely Environmental performance, Social performance, Supplier performance, and Destination management performance.

### Developer:

It is operated as a multi-stakeholder partnership founded and endorsed by IMEX, MCI, the International Congress and Convention Association (ICCA) and European Cities Marketing.

### Success factors:

The GDS-Index has become a 'must' for cities who seek to position themselves as sought-after convention/event destinations. In particular, the ranking has attracted considerable (media) interest and stimulates greater effort amongst cities. The Index is built around ongoing improvement with a move towards more tourism-specific measures, in addition to city-specific ones.



**BRISBANE JOINS THE GDS-INDEX**

17 JUL ANNOUNCEMENT: BRISBANE JOINS THE GDS-INDEX

778 Views

The GDS-Index is delighted to announce that Brisbane has become the 50th city to join the GDS-Index. As such, the city will actively participate in the collaborative platform to: • Benchmark the...

Read more



## Case Study 5

UNWTO Tourism for SDGs Platform (Sustainable Development Goals)

[tourism4sdgs.org](http://tourism4sdgs.org)

### Purpose:

A platform with a wide range of resources to help facilitate tourism to be a driver for realising the 17 Sustainable Development Goals (SDGs). The SDGs are a framework comprising 17 goals and 169 targets, to guide and measure contributions to sustainable development towards 2030.

The Australian Government is committed to the SDGs and submitted their first voluntary national review in 2018. The SDGs are used by government, civil society and the private sector as a framework for measuring progress. Tourism has the potential to contribute to all of the goals, directly or indirectly – and tourism has been included as targets in goals 8, 12 and 14.

### Developer:

UNWTO

### Metrics:

Set of 17 SDGs and 169 associated targets which aim to be people-centred, transformative, universal and integrated.



## Case Study 6

Intrepid Travel

[intrepidgroup.travel](http://intrepidgroup.travel)

### Purpose:

One of very few tourism companies that release integrated reports that bring together financial and other performance. The 2018 full and transparent report aims to illustrate how Intrepid business creates value, both in the short-term and long-term. The report is targeted at a wide range of stakeholders, including employees, customers, communities, supply chain partners and others.

### Metrics:

Reporting focuses on six capital inputs, and also connects business performance to the Sustainable Development Goals.

### Success factors:

Intrepid now employs a Purpose Manager and has set targets for returning profit to sustainability initiatives. It is globally recognised as a leader, not at last because it is carbon neutral in its operations and has a high integrity with visited communities.



## Case Study 7

UNWTO Statistical Framework for Measuring the Sustainability of Tourism

[unwto.org/mst](http://unwto.org/mst)

### Purpose:

With the support of the United Nations Statistics Division (UNSD), UNWTO has launched the initiative Towards a Statistical Framework for Measuring the Sustainability of Tourism (MST). The aim is to develop an international statistical framework for measuring tourism's role in sustainable development, including economic, environmental and social dimensions. The statistical framework from the MST will provide an integrated information base to better inform sustainable tourism, to facilitate dialogue between different sectors and encourage integrated, locally relevant decision-making.

### Metrics:

The focus is coverage of economic and environmental statistics and some social statistics such as employment. A feature of the statistical framework will be the connections between the established accounting framework for tourism, TSA and accounts from the System of Environmental-Economic Accounting (SEEA) framework. In using an accounting basis for the statistical framework, the initiative seeks to harness the benefits from accounting approaches in ensuring internal coherence, the ability to understand data gaps and place different information in context, and the potential to derive indicators based on consistently defined economic and environmental information.



## Case Study 8

Principles for Success - South West Tourism Alliance, UK

[swtourismalliance.org.uk](http://swtourismalliance.org.uk)

### Purpose:

South West Tourism in England developed a tool and modelled carbon impacts of different tourism policies across the region to identify how to reduce sectoral emissions alongside growth in value. This resulted in two core indicators and targets – to increase staying visitor expenditure alongside a target to decrease emissions as set out in their 'Principles for Success' document.

### Metrics:

Ten indicators were set out, alongside an aim, data source, baseline (including year) and 2020 target. These comprise:

- Two headline core indicators for visitor expenditure and carbon emissions;
- Three contributory indicators for length of stay, energy consumed and km travelled;
- Five supplementary indicators for seasonality, employment, community acceptance, quality of the local destination environment, and bathing water quality.

Core Indicator	Aim	Source	Baseline (inc. year)	2020 Target
Visitor Expenditure	3% increase per year (5% including inflation) in staying visitor expenditure	UKTS/IPS	£4,622m (2008)	£8,300m
Carbon Emissions	18% decrease (tonnes CO <sub>2</sub> ) by 2020	REAP Tourism	10m tonnes (2008)	8.2m tonnes
Contributory Indicators	Aim	Source	Baseline (inc. year)	2020 Target
Domestic visitor car km travelled to the region	15% decrease by 2020	UKTS	3,934m km (2008)	3,344m km
Energy consumption of commercial tourism accommodation	13% decrease by 2020 (GWh)	REAP Tourism	1,298 GWh (2008)	1,129 GWh
Length of stay	1 day increase in average length of stay by 2020	UKTS/IPS	4.33 nights (2008)	5.33 nights
Supplementary Indicators	Aim	Source	Baseline (inc. year)	2020 Target
Seasonality	Decrease the variance between peak and shoulder season visits by 45% <sup>21</sup> by 2020	UKTS	Total trips per month – average deviation 0.42 (2008)	0.23 average deviation
Employment	Increase the number of FTE jobs supported by tourism expenditure by 3%pa	Value of Tourism	198,457 FTE jobs (2008)	282,952 FTE jobs
Community acceptance	Maintain the proportion of residents who believe that overall "tourism is good for the area" by 2020	Community Attitudes Survey	96% residents in agreement (2006)	96% residents in agreement
Quality of local destination environment	5% increase in Local Environmental Quality (LEQ) rating for South West England	Keep Britain Tidy – Local Environmental Quality Survey	70% LEQ rating (2008/09)	75% LEQ rating
Bathing water quality	7.5% increase in proportion of SW bathing waters achieving 'Sufficient' or higher classification	DEFRA	89.5% of SW bathing waters (2009)	97% of SW bathing waters

<sup>21</sup> Based on SW Monitoring and Evaluation Framework, KPMG (2005)

## Case Study 9

### New South Wales – Visitor Economy Index

[industry.nsw.gov.au/\\_\\_\\_data/assets/pdf\\_file/0003/172092/Visitor-Economy-Industry-Action-Plan-2030.pdf](https://industry.nsw.gov.au/___data/assets/pdf_file/0003/172092/Visitor-Economy-Industry-Action-Plan-2030.pdf)

#### Purpose

To provide a more comprehensive richer story to determine the success of the NSW Visitor Economy. Moving beyond the focus on a single target (overnight expenditure).

#### Metrics

Use a mix of quantitative and qualitative metrics to determine success of the Visitor Economy. The metrics will be used to establish three indices to track 1) industry conditions, 2) industry perceptions and 3) the future industry outlook over time. The three indices will be used to create a composite Visitor Economy Index as depicted.

#### Audience

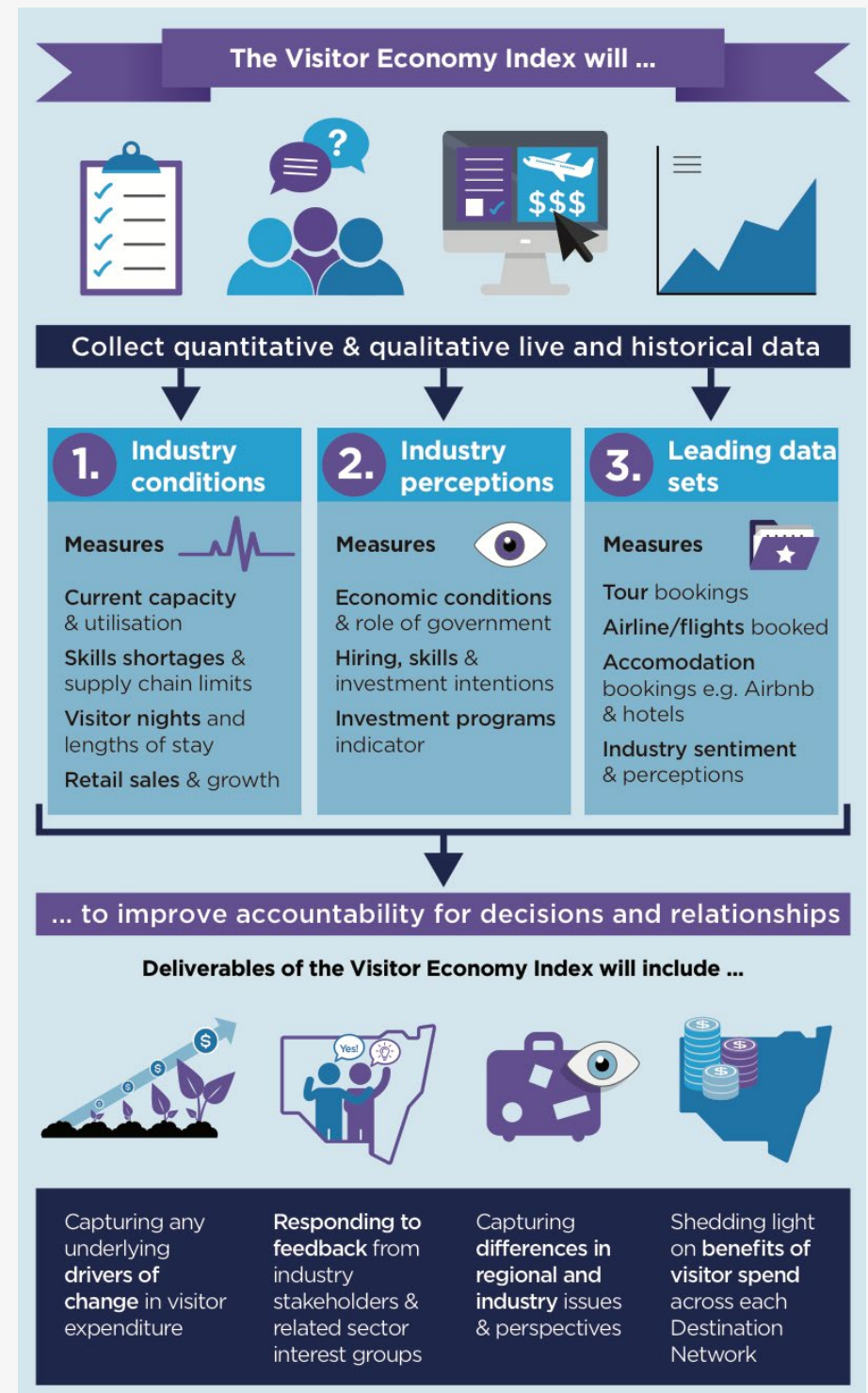
To enable the NSW Government to track industry conditions, industry perceptions and the future industry outlook over time. The intention is to provide quarterly reports to the Team NSW Tourism Taskforce based on the three indices. Each report will also be electronically published online for industry use to provide valuable insights to the sector on trends and growth.

#### Process

The NSW Government, working in partnership with Destination NSW is leading the work, which is in early stages of development. Led by a Team NSW Tourism Taskforce that includes key industry stakeholders to test the new index options. Following a consultation phase, the new indices will be implemented using staged pilot studies in each Destination Network.

The indices will also capture changes over time in aspects such as regional dispersal rates or other measures of visitor composition and behaviour. The sustainability of visitation can also be monitored and tracked by new index metrics.

The three indices will provide deeper understanding of business conditions and industry sentiment across regional areas. This will help the NSW Government respond to regional issues efficiently and identify opportunities to invest in the regional Visitor Economy.



# GRIFFITH INSTITUTE FOR TOURISM

Griffith is Australia's leading tourism university, ranked number one in Australia and number two in the world in the most recent Shanghai Ranking's Global Ranking of Academic Subjects. It is one of only two universities in Australia to receive the maximum ranking assessing Griffith's tourism research as well above world standard from the Australian Research Council.

Griffith Institute for Tourism (GIFT) offers specialised consultancy to all levels of the tourism industry and maintains extensive partnerships. GIFT has delivered projects for global tourism leaders, Global Trade Policy Analysis Project network, Pacific Asia Travel Association, United Nations World Tourism Organisation and World Travel and Tourism Council. GIFT also works closely with Australian-based industry partners, such as Tourism Australia, Tourism and Events.

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