

Tourism Futures Conference 2006

Industry Survey Findings Interim Report



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Methodology

- ❖ Survey conducted on-line as a self-completion questionnaire.
- ❖ Questionnaires were completed by individuals working in the Australian and New Zealand tourism industries, and delegates of the Tourism Futures Conference.
- ❖ A total of 122 Australian respondents and 10 New Zealand respondents have participated in the survey to date. Percentages for the New Zealand sample have not been reported, as the sample is too small
- ❖ Additional responses will continue to be collected during the lead-up to the conference
- ❖ As an incentive, respondents were offered the opportunity to be entered into a prize draw for a 2-night holiday to Kingfisher Bay Resort.



Sample Composition

Australian respondents belong to the following industry categories:

- ❖ Tourism Operator (18%)
- ❖ State Tourism Office (16%)
- ❖ University/TAFE/Other Academic (15%)
- ❖ Regional or Local Tourism Organisation (10%)
- ❖ Consultant (10%)
- ❖ State Government Department (8%)
- ❖ Local Government (7%)
- ❖ Industry Association (5%)
- ❖ Commonwealth Government Department (2%)
- ❖ Other (9%)



Key Findings

Top Five Challenges Facing the Australian Tourism Industry – Next Year

Challenges	Percent
The price of oil/fuel and the effect on airfares	60%
The price of oil/fuel and the effect on drive tourism	43%
Effect of world instability on Australia e.g. terrorism	38%
Need for product development and infrastructure in regional areas	25%
Marketing Australia domestically	20%



Key Findings

Top Five Challenges Facing the Australian Tourism Industry – Next 10 Years

Challenges	Percent
Need for product development and infrastructure in regional areas	38%
The price of oil/fuel and the effect on airfares	34%
Effect of world instability on Australia e.g. terrorism	33%
Climate change	30%
Competition by overseas destinations	25%



Key Findings

Australia's Top Five Competitive Advantages – Next Year

Competitive Advantages	Percent
Stable and safe country	81%
Australia's culture and friendly people	60%
Clean/ green environment/ natural/ pristine beauty of Australia	59%
Unique experience offered in Australia	54%
Australia's status as a highly desirable destination	46%



Key Findings

Australia's Top Five Competitive Advantages – Next 10 Years

Competitive Advantages	Percent
Clean/ green environment/ natural/ pristine beauty of Australia	68%
Stable and safe country	67%
Australia's culture and friendly people	54%
Unique experience offered in Australia	52%
Vastness of Australia/ uncrowded	49%



Key Findings

Australia's Top Five Opportunities for Growth – Next Year

Opportunities for Growth	Percent
Grey Nomads/ Senior Tourism	35%
Ecotourism	34%
Backpackers	33%
Food & Wine Tourism	29%
Domestic Tourism	29%



Key Findings

Australia's Top Five Opportunities for Growth – Next 10 Years

Opportunities for Growth	Percent
Grey Nomads	52%
Ecotourism	43%
Business Events Tourism (MICE)	36%
Adventure Tourism	29%
Domestic Tourism	28%



Key Findings

Top Five Areas of Importance in the Tourism White Paper

Areas of Importance	Percent
Lifting domestic tourism	59%
Strengthening regions	54%
Coordination- between industry and government at all levels	49%
Research	47%
Lifting Australia's profile	39%



Sample Composition

New Zealand respondents belong to the following industry categories:

- ❖ Regional Tourism Office
- ❖ Tourism Operator
- ❖ Industry Association
- ❖ Media
- ❖ Airline
- ❖ Other



Key Findings

Top Challenges Facing the New Zealand Tourism Industry- Next Year

- ❖ Effect of world instability on New Zealand, e.g. terrorism
- ❖ The price of oil/ fuel and the effect on airfares
- ❖ Marketing New Zealand domestically
- ❖ Training and staffing issues (including skills shortage)
- ❖ Delivery of quality product and services
- ❖ Sustainability of tourism (triple bottom line- social, environmental, and economic sustainability)
- ❖ World economy



Key Findings

Top Challenges Facing the New Zealand Tourism Industry- Next 10 Years

- ❖ The price of oil/ fuel and the effect on airfares
- ❖ Sustainability of tourism (triple bottom line- social, environmental, and economic sustainability)
- ❖ Effect of world instability on New Zealand, e.g. terrorism
- ❖ World economy
- ❖ Quality of roads
- ❖ Need for product development and infrastructure in regional areas



Key Findings

New Zealand's Top Competitive Advantages – Next Year

- ❖ Stable and safe country
- ❖ Clean/ green environment/ natural/ pristine beauty of New Zealand
- ❖ Uncrowded/Isolated
- ❖ Adventure Tourism
- ❖ Maori culture



Key Findings

New Zealand's Top Competitive Advantages – Next 10 Years

- ❖ Clean/ green environment/ natural/ pristine beauty of New Zealand
- ❖ Uncrowded/Isolated
- ❖ Stable and safe country
- ❖ Maori culture
- ❖ Unique experience offered in New Zealand



Key Findings

New Zealand's Top Opportunities for Growth – Next Year

- ❖ Domestic Tourism
- ❖ Long-haul Inbound Tourism
- ❖ Short-haul Inbound Tourism
- ❖ Adventure Tourism
- ❖ Ecotourism
- ❖ Food and Wine Tourism
- ❖ Hiking Tourism
- ❖ Drive Tourism
- ❖ Indigenous Tourism
- ❖ Geotourism



Key Findings

New Zealand's Top Opportunities for Growth – Next 10 Years

- ❖ Domestic Tourism
- ❖ Ecotourism
- ❖ Education Tourism
- ❖ Adventure Tourism
- ❖ Food and Wine Tourism
- ❖ Special Events and Festivals
- ❖ Indigenous Tourism
- ❖ Geotourism



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Roy Morgan — Research —

