

FINAL PROGRAM AND ABSTRACTS



Fourth National Conference on TOURISM FUTURES

Investing for Growth
2 to 5 October 2005



proudly hosted by



KEYNOTE SPEAKERS

We have sourced keynote speakers from a diverse range of backgrounds that include tourism, government, industry associations, operators, airline and business sectors. In addition to the keynote speakers featured below, we have over 130 confirmed concurrent presenters and workshop facilitators.



■ **Rupert McCall**
Master of Ceremonies



■ **Terry Jackman AM**
Chairman – Tourism Queensland



■ **Hon. Fran Bailey MP**
Minister for Small Business and Tourism



■ **Scott Morrison**
Managing Director, Tourism Australia



■ **Geoff Carmody**
Consultant & Co-Founder, Access Economics



■ **Don Henry**
Executive Director – Australian Conservation Foundation



■ **Prof. Terry De Lacy**
Chief Executive – Sustainable Tourism CRC



■ **Bernard Salt**
Partner – KPMG



■ **Grant Hunt**
CEO – Voyages



■ **Hon. Tim Fischer OA**
Chairman – Tourism Australia



■ **Prof. Ian Lowe AO**
Griffith University



■ **Michele Levine**
Chief Executive Officer – Roy Morgan Research



■ **Dr John Cole**
Executive Director, Sustainable Industries Division – Queensland Environmental Protection Agency (EPA)



■ **Wayne Kayler-Thomson**
Deputy Chief Executive – Tourism Victoria and Chairman – Australian Regional Tourism Network



■ **Helen Ringrose**
Director-General – Department of Tourism, Fair Trading and Wine Industry Development



■ **Gilbert Rochcouste**
Managing Director – Village Well



■ **Andrew Skeat**
Great Barrier Reef Marine Park Authority



■ **Soheil Abedian**
Joint Managing Director – Sunland Group Limited



■ **Jeff Floyd**
CEO – AAA Tourism



■ **Lois Peeler**
Aboriginal Tourism Australia



■ **Saul Eslake**
Chief Economist – ANZ Bank



■ **Emma Alberici**
Finance Editor, 7.30 Report, ABC Television



■ **Ros Moriarty**
Managing Director – Jumbana Group



■ **Rob Gurney**
Head of Sales and Marketing, Qantas Airlines



■ **Siimon Reynolds**
Creative Director – Love Communications

WELCOME MESSAGE

Queensland is proud to host the Fourth Annual Tourism Futures Conference, and I welcome you to this important forum.

Tourism makes a major contribution to Australia's economy and way of life. For Queensland it is absolutely essential. It is our second-largest export industry and employs almost one in 10 Queenslanders.

Tourism has emerged from the shadows of global and local events as a strong and sustainable economic, social and environmental force. Hard work and inspired vision have generated substantial public and private investment through the difficult years, producing vital new infrastructure.

We now have a more competitive national aviation industry, with a centre of gravity that is shifting north - to Queensland. With encouragement from the Queensland Government and the private sector, our cruise shipping industry is also growing and

is expected to generate \$100 million for Queensland this year. However environmental, economic and market conditions are constantly changing and tourism, like other industries, must tackle new challenges. The industry must continue to innovate and seize opportunities.

The Fourth National Conference on Tourism Futures, with the theme Investing for Growth, will identify where resources can be best directed for optimum sustainable growth and profits. Issues on the table will include vision, planning, leadership and skilling.

For instance, delegates will consider:

- A common vision for the future of tourism in Australia
- Working together for tourism planning and development to benefit the whole industry
- Cohesive industry leadership in partnership with government

- Professional skills training and accreditation, and more attractive employment conditions and career options - to deliver better career opportunities and greater workforce retention rates.

Queensland, the Smart State, is home to a highly-innovative tourism industry. We are proud to have initiated this conference, and proud of the achievements of previous forums. I know you will have your own views on Investing for Growth and I encourage you to raise them during conference sessions.

Hon. Peter Beattie MP

Premier of Queensland and Minister for Trade



MINISTER'S WELCOME

Welcome to the Fourth National Conference - Tourism Futures and one of Queensland's premier destinations, the Gold Coast.

This year's conference promises to be both enlightening and inspiring with a speaker program that boasts some of the nation's most respected commentators on tourism issues.

Tourism is a remarkable and complex industry.

Resilient and robust, its economic strength is felt at all levels of government, across many allied industries and by Australian communities, large and small, everywhere.

The decision to take part in this important event is evidence of your commitment to build on that strength and play your part in the creation of a sustainable industry.

Sustainability is essential but it will take collaborative action on behalf of a wide range of stakeholders to get it right.

Tourism Futures will present you with many opportunities to consider and discuss key topics, and form new ideas, approaches and partnerships that will enrich your efforts long after the conference concludes.

I wish all delegates an enjoyable and rewarding three days and hope each of you finds the time during your stay to explore and experience all that the Gold Coast offers.

The Hon. Margaret Keech MP

Minister for Tourism, Fair Trading and Wine Industry Development (Qld)



MESSAGE FROM THE MINISTER FOR SMALL BUSINESS AND TOURISM

I am delighted to welcome delegates to the Fourth National Tourism Futures Conference. This year's theme Investing for Growth offers excellent opportunities to explore the interaction between public and private sectors for growth and development in the tourism industry.

It will be an exciting four days, as there will be many expert speakers who will be addressing future trends in tourism and discussing ways that the Australian tourism industry can prepare to meet the opportunities and challenges that lie ahead.

The Australian Government is investing \$453 million over the next three years to better position Australia in the global market and to encourage more Australians to holiday at home.

I have recently appointed Decipher Technologies to develop a national tourism accreditation portal. This accreditation portal will ensure quality tourism products for international and domestic tourists.

Strengthening of the Approved Destination Status scheme will see our Chinese tourists have a high quality tourism experience when visiting Australia and are protected from unscrupulous practices of a small number of rogue tourism operators.

The challenges posed by projected growth in inbound tourism, both from emerging markets such as China and India and from our established markets, calls for renewed

investment by industry into infrastructure, product and marketing.

Two consultative groups have now been established to develop a National Tourism Investment Strategy and an Emerging Markets Strategy to position Australia strongly in the global market and to capture future markets.

The Australian tourism industry is well on its way to achieving the forecast growth of 9.3 million international visitors and 323 million domestic tourists in 2014.

This \$73 billion industry contributes significantly to the national, state and territory economies and it is vital that we work together to ensure the continued growth and prosperity of the tourism sector.

I hope this conference will inspire and generate new ideas to build upon the Australian tourism industry's huge potential.

The Hon. Fran Bailey, MP

Minister for Small Business and Tourism



CONFERENCE PROGRAM

PRE-CONFERENCE

SUN 2 OCTOBER

3.00 - 6.00pm:	Registration for pre-conference forums
7.30 - 10.30pm:	Networking Dinner (optional) <i>however highly recommended</i> <i>Venue: Billy's Beach House Hotel, Cnr The Esplanade and Hanlan Street, Surfers Paradise</i>

OPTIONAL PRE-CONFERENCE FORUMS

MON 3 OCTOBER

7.30am:	Registration opens
8.30 - 5.00pm:	Technology Futures
9.00 - 4.30pm:	Local Government Driving Regional Tourism
9.00 - 5.00pm:	Aviation: Destination Growth under New Paradigms
8.45 - 5.00pm:	Growing Tourism: Key Drivers and Investors

TOURISM FUTURES CONFERENCE

3.00 - 6.00pm:	Tourism Futures Conference – Registration
6.30 - 8.30pm:	Tourism Futures Conference – Welcome Cocktail Party <i>Venue: Poolside at the Surfers Paradise Marriott Hotel - Supported by Gold Coast City Council</i>

TUES 4 OCTOBER

7.30am:	Registration opens - <i>Venue: Conference Foyer, Surfers Paradise Marriott Hotel</i>
8.30am:	Official Opening and Welcome Master of Ceremonies: Rupert McCall
8.35am:	Presentation on Themes and Delegation Tony Charters , Conference Convenor
8.40am:	Introduction of Ministers Terry Jackman , Chairman – Tourism Queensland to introduce Ministers
8.50am:	Hon. Margaret Keech MP , Minister for Tourism, Fair Trading and Wine Industry Development - <i>Video Welcome</i> Hon. Fran Bailey MP , Minister for Small Business and Tourism
9.10am:	Geoff Carmody , Consultant & Co-Founder, Access Economics <i>"Analysis of Performance of the Australian Tourism Industry and Predictions on Future Issues"</i>
9.30am:	Scott Morrison , Managing Director – Tourism Australia <i>"Tourism into the Future"</i>
9.50am:	Rob Gurney , Head of Sales and Marketing, Qantas Airlines <i>"Aviation Futures: Drivers for Growth"</i>
10.10am:	Questions and Answers
10.30 - 11.00am:	Morning Tea - <i>Venue: Conference Foyer, Surfers Paradise Marriott Hotel</i>
11.00am:	Don Henry , Executive Director – Australian Conservation Foundation <i>"Working Together to Protect and Enjoy the Environment"</i>
11.20am:	Prof Terry De Lacy , Chief Executive – Sustainable Tourism CRC <i>"The State of the Industry: Australian Tourism"</i>
11.40am:	Grant Hunt , Chief Executive Officer – Voyages <i>"Community and Environment – the Tourism Industry"</i>
12.00pm:	Bernard Salt , Partner - KPMG <i>"Investment Implications of our Demographic Destiny"</i>
12.20pm:	Questions and Answers
12.30 - 1.30pm:	Lunch with The Hon. Tim Fischer OA , Chairman – Tourism Australia <i>Venue: Garden Terrace, Surfers Paradise Marriott Hotel</i> <i>"Tango in Tourism: Driving Future Tourism Investment – Lessons from other Sectors"</i>



CONFERENCE PROGRAM



Concurrent Sessions	Sustainable Development Theme Venue: Waianbah Room	Competitive Advantage Theme Venue: Elston Room	Workshop: Transport Investment Supporting Tourism Growth Venue: The Hinterland Rooms	Marketing Theme Venue: The Verandah Room
1.30 – 1.50pm:	Phil Harman , Tourism Noosa & Noosa Community Tourism Board "Cocktail of Experiences"	Greg Watts , Office of Economic & Statistical Research Queensland Treasury "A Dynamic General Equilibrium Model of Tourism"	Facilitated by Eddie Peters , District Director (South Coast Hinterland), Department of Main Roads. Access is a critical factor in tourism, with roads and transport akin to being the lifelines to industry. Drive is still the biggest means of access for tourism and provides a vital linkage to transport. Queensland Transport and the Department of Main Roads, assisted by Tourism Queensland will explore tourism infrastructure and tourism growth strategies for expansion into the next decade.	Ian MacFarlane , Tourism Australia "Does Destination Branding Have a Future"
1.50 – 2.10pm:	Claire Ellis , Tourism Tasmania "Sustainable Tourism Indicators in Tasmania"	Steven Ciobo MP , Federal Member for Moncrieff "Hopping over Barriers to Competition: Why a National Champion and Liberalised Skies are Good for Tourism"	Queensland Transport and the Department of Main Roads, assisted by Tourism Queensland will explore tourism infrastructure and tourism growth strategies for expansion into the next decade.	<i>Double Session</i>
2.10 – 2.30pm:	Paul Weymouth , South Australian Tourism Commission "The Sustainable Tourism Package - Aligning the Rules with the Vision"	Helen Ayres , School of Information Management & Tourism Division of Communication & Education, University of Canberra "Influences on Careers in the Tourism Industry"	Session 1: Department of Main Roads, Queensland Transport and Tourism Queensland Historical overview and reasons why transport matters.	Philip Curry , Consult Curry "Where in the World are Consideration Sets: Connecting Tourists, Destinations & Business"
2.30 – 2.50pm:	Karin Schianetz , Environmental Engineering, University of Queensland and ST CRC "Challenges of Sustainability Assessment for Tourism Destinations"	Ramy Filo , Australian Timeshare & Holiday Ownership Council "The Changing Face of the Timeshare Industry in Australia"	Session 2: Department of Main Roads and Queensland Transport and tourism in the future.	Shawn Day Newcastle City Council "Shedding the Steel City Image: The Role of Tourism in City Centre Renewal in Newcastle, NSW"
2.50 – 3.00pm:	Questions & Answers	Questions & Answers	Questions & Answers	Questions & Answers
3.00 – 3.30pm:	Afternoon Tea - Venue: Conference Foyer, Surfers Paradise Marriott Hotel			
Concurrent Sessions	Sustainable Development Theme Venue: Waianbah Room	Marketing Theme Venue: The Verandah Room	Strategic Partnerships & Alliances Theme Venue: Elston Room	Workshop: Developing a Shared Vision- Shaping our Tourism Future Venue: The Hinterland Rooms
3.30 – 3.50pm:	Andrew Millward , The Royal Automobile Club of Queensland (RACQ) "RACQ's On-line Trip Planner"	Prof Michael C.G. Davidson , Griffith University "Quality: A Competitive Advantage?"	Helen Lewis , Outback Highway Development Council "The Outback Highway – a Journey Through the Heart"	Stewart Moore , Managing Director, Sustainable Tourism Services Ian Kean , Managing Director, Tourism Services Pty Ltd
3.50 – 4.10pm:	Peter Hadley , Department of Industry, Tourism & Resources "Cruise Shipping Review"	Joyce DiMascio , TTF Australia "Leveraging the Value of Major Events"	Mally McMurtrie , Southern Downs Tourist Association "Reluctant Partners"	The process of building a shared vision for tourism involves developing a picture of the kind of future we seek to create for visitors and residents alike. Where will tourism be in 2015, what are the opportunities and threats and how do we strategically position ourselves to respond to these challenges in a changing global tourism landscape? Consistent with the theme of the Conference, this workshop will look at future scenarios for the industry and assess the implications for the sustainable development of the tourism industry in Queensland and Australia.
4.10 – 4.30pm:	Natasha Dunne , Harvest Hotline Australia "Visa Changes to Benefit Tourism in Regional Areas"	Dennis Chant , Queensland Airports Limited "Tourism and Aviation Interdependencies"	Sarah Gardiner , Principal Project Officer Tourism, Gold Coast City Council "A Case Study of the Gold Coast Backpacker Industry"	
4.30 – 4.50pm:	Peter O'Reilly , Tourism Queensland, and Toby Hutcheon , Queensland Conservation Council "Tourism And Conservation: a United Vision For Queensland"	Stephen Pahl , Ecotourism Australia "What Travellers Want" – Authenticity in Ecotourism	Char-Lee McLennan , Tourism Branch, Economic Development & Major Projects, Gold Coast City Council "The Gold Coast Golf Monitor – (GCGM)"	
4.50 – 5.00pm:	Questions & Answers	Questions & Answers	Questions & Answers	Questions & Answers
7.30 – 10.30pm:	Networking Dinner (optional) <i>however highly recommended</i> Venue: Grumpy's Wharf, "Tiki Village" Riverend Cavill Avenue, Surfers Paradise - includes 2 course meal and drinks			

CONFERENCE PROGRAM



WED 5 OCTOBER

Concurrent Sessions	Marketing Theme Venue: The Verandah Room	Workshop: Sustainable Tourism CRC - Profits from Innovation Venue: Elston Room	Workshop: Tourism Workforce Trends and Challenges Venue: The Hinterland Rooms	Sustainable Development Theme Venue: Waiambah Room
7.30am:	Registration opens - Venue: Conference Foyer, Surfers Paradise Marriott Hotel			
8.30 – 8.50am:	Carolyn Childs , Travel Research Centre "Using Research To Grow Visitation and Expenditure. A Case Study: Modelling Travel To The Outback."	Facilitated by: Brad Cox , Communications and Extensions Manager, Sustainable Tourism Services Session 1: Prof Terry De Lacy , Sustainable Tourism Cooperative Research Centre "Knowledge Products Introduction" Session 2: Prof Leo Jago , Sustainable Tourism CRC "Encore Event Evaluation Kit" Session 3: A/Prof Marg Deery , Sustainable Tourism CRC "Visitor Information Centre Kit" Session 4: Prof Leo Jago , Sustainable Tourism CRC "Motel Makeover Kit" Session 5: Mark Phillips , Decipher "Decipher Technologies"	Facilitated by: Rod Camm , Executive Director - Industry Development Division, Department of Employment and Training Representatives from the Queensland Department of Employment and Training and the Australian Department of Employment and Workplace Relations will jointly present the latest developments in the tourism workforce. Facilitators will invite discussion concerning tourism workforce trends and challenges; skills shortages; the latest training options; and industrial relations. The session will also cover employment and training initiatives targeting the ageing workforce, Indigenous peoples and people with a disability.	Alison Taylor , Queensland Department of Local Government and Planning "Local Planning for Tourism's Future in Queensland's Coastal Communities" Tom Frost , Booz Allen Hamilton "Getting Our Share of the Emerging Giants" Prof Jack Carlsen , Tourism Studies – Curtin University "Investing in Research: The Sustainable Tourism CRC" Prof Beth Woods , Executive Director, Queensland Dept of Primary Industries and Fisheries R&D Strategy "Profitable Primary Industries – I'd Like to See That" Tamara Wilcock , National Coordinator, International Event Coordinator Network, Tourism Delivery Support Section, DIMIA "Visa information for Business Tourism to Australia"
8.50 – 9.10am:	Jill Collins , Voyages "The Importance of Corporate Reputation in an Uncertain World"			
9.10 – 9.30am:	Ian MacFarlane , Tourism Australia and Geoff Buckley , Tourism Australia "Talking to the Right People"			
9.30 – 9.50am:	Double Session			
9.50 – 10.00am:	Questions & Answers	Questions & Answers	Questions & Answers	Questions & Answers
10.00 – 10.30am:	Morning Tea - Venue: Conference Foyer, Surfers Paradise Marriott Hotel			
Themed Plenary Session	Session 1: Keynote Presentations - Sustainability & Standards - Venue: Elston Room		Session 2: Industry Development & Marketing Venue: Waiambah Room	
Chair:	Tony Charters , Conference Convenor		Rupert McCall , Master of Ceremonies	
10.30 – 10.50am:	Prof. Ian Lowe , Griffith University "Global Warming: Implications for Tourism – How Can the Industry Respond"		Michele Levine , Roy Morgan Research "Tourism and Leisure in the 21 st Century"	
10.50 – 11.10am:	Dr John Cole , Queensland Environmental Protection Agency (EPA) "Valuing the Environment and the Future of Tourism in Queensland"		Wayne Kayler-Thomson , Tourism Victoria, Chairman - Australian Regional Tourism Network "Building the Future of Regional Tourism"	
11.10 – 11.30am:	Helen Ringrose , Department of Tourism, Fair Trading and Wine Industry Development (Qld) "Indigenous Tourism Development in Cape York and Regional Queensland"		Gilbert Rochcouste , Village Well "Community Capacity Building and Leadership"	
11.30 – 11.50am:	Andrew Skeat , Great Barrier Reef Marine Park Authority "Partnerships in Protected Areas"		Soheil Abedian , Sunland Group Limited "Case Study on Sunland's Approach to Building Tourism Icons"	
11.50 – 12.10pm:	Jeff Floyd , AAA Tourism "Investing for Growth Through Quality Systems – the Outlook for Australia"		Lois Peeler , Aboriginal Tourism Australia "Investing in the Future – Drawing on the Past"	
12.10 – 12.30pm:	Questions & Answers		Questions & Answers	



CONFERENCE PROGRAM



12.30 – 1.30pm: Lunch - Venue: Garden Terrace, Surfers Paradise Marriott Hotel				
Concurrent Sessions	Sustainable Development Theme Venue: Waianbah Room	Competitive Advantage Theme Venue: Elston Room	Strategic Partnerships & Alliances Theme Venue: The Hinterland Rooms	Marketing Theme Venue: The Verandah Room
1.30 – 1.50pm:	Dr Ronda Green , Araucaria Ecotours "Balancing Quality Wildlife Tourism & Biodiversity Conservation"	Stephen Grieve , Council of Tourist Associations "Local Area Tourism Research – The Solution At Last"	Rowan Sproule , Infrastructure & Research - Tourism Tasmania "Developing the Huon Valley as a Tourism Destination"	Jenny Tonkin - Park Operator representing the Caravan Industry Australia "The Economic Future of the Caravan Park Industry"
1.50 – 2.10pm:	Ameeta Jain , Deakin University "Ecotourism in Costa Rica: An Economic Framework of Analysis"	Gary Rebgetz , Campervan and Motorhome Club of Australia "Investing to Achieve Sustainable Growth of the Motorhome and Self-contained Vehicle Market"	Bruce Leaver , Parks Australia Division, Department of Environment & Heritage "National Park' a Brand Name Lost in the Clatter"	Andy Gray , Queensland - Pacific Micromarketing "Customer and Market Segmentation – Chasing the One-to-One marketing Ideal"
2.10 – 2.30pm:	Matt Morris , Mareeba Shire Council "Development of a National Avitourism Industry – an Australian Tourism & Conservation Initiative"	Carmen Smith , Destination Queensland - Tourism Queensland. "Building Skills in Queensland Tourism"	Prof Jeff Wilks , University of Queensland, Brett Williamson , Surf Life Saving Club Queensland and George Hill , Surf Life Saving Club Queensland "Tourists and Beach Safety in Queensland – Developing Strategic Partnerships"	Graham Dillon O.A.M. , Kalwun Development Corporation Ltd "Indigenous Tourism in a Multicultural Society"
2.30 – 2.45pm:	Questions & Answers	Questions & Answers	Questions & Answers	Questions & Answers
2.45 -3.15pm: Afternoon Tea - Venue: Conference Foyer, Surfers Paradise Marriott Hotel				
Plenary Session - Venue: Elston Room				
3.15 -3.35pm:	Saul Eslake , Chief Economist - ANZ Bank "Tourism Investment"			
3.35 -3.55pm:	Emma Alberici , Finance Editor, 7.30 Report, ABC Television "Investing for Growth - Perspectives for Small Tourism Business Operators"			
3.55 -4.15pm:	Ros Moriarty , Managing Director – Jumbana Group "Building Indigenous Involvement in the Tourism Industry Through Art and Design"			
4.15 -4.35pm:	Siimon Reynolds , Creative Director - Love Communications "Building Destination Awareness"			
4.35 -5.35pm:	Scott Morrison , Managing Director - Tourism Australia, and State Tourism Organisation's CEO Forum Interactive workshop of major conference outcomes and future agendas			
5.35pm:	Close			
6.45pm -Late:	Official Conference Finale Dinner Venue: Dreamworld (includes courtesy return transfers) Coaches will depart 6.45pm sharp. Delegates are to meet outside the Marriott front entrance			

