

WELCOME



Fourth National Conference on
TOURISM FUTURES

Investing for Growth
2 to 5 October 2005

Tourism Futures is about...

- stepping back from our businesses and organisations; our regions and our states; and taking a national view
- taking time out from day to day issues, looking forward ten years – across the horizon
- identifying emerging trends, challenges and opportunities

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- Not only about 10 years out - 12 months out is a long time in today's world
- The horrific events in Bali serve as a reminder of this
- The oil price explosion certainly wasn't predicted this time last year
- Some perspective on key issues provided by Roy Morgan Research Tourism Futures Survey.
- Key players across industry, business, government and academia
- The results are very instructive:

Survey respondents belong to the following industry categories:

- Tourism Operator (34%)
- Consultant (14%)
- Local Government (14%)
- University/TAFE/other Academic (9%)
- State Tourism Office (6%)
- State Government Department (7%)
- Regional or Local Tourism Organisation (4%)
- Industry Association (4%)
- Commonwealth Government Department (2%)
- Other (6%)

Top Five Challenges Facing the Australian Tourism Industry – Next Year

Challenges	Percent
The price of Oil/Fuel	66%
Effect of World Instability	39%
Cost of Public Liability Insurance	25%
Need Product Development and Infrastructure in Regional Areas	23%
Training and Skills Shortage	18%

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

Challenges	Percent
Sustainability of Tourism (Triple Bottom Line)	36%
Need for Product Development and Infrastructure in Regional Areas	36%
Effect of World Instability	32%
The price of Oil/Fuel Costs	31%
Global Warming	25%

Australia's Top Five Competitive Advantages – Next 10 Years

Competitive Advantages	Percent
Stable and Safe Country	69%
Pristine Beauty of Australia	69%
Unique Experience Offered in Australia	50%
Australia's Culture and Friendly People	48%
Vastness of Australia/Uncrowded	47%

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

Opportunities for Growth	Percent
Ecotourism	52%
Grey Nomads	51%
Adventure	31%
Outback Tourism	30%
Indigenous Tourism	29%

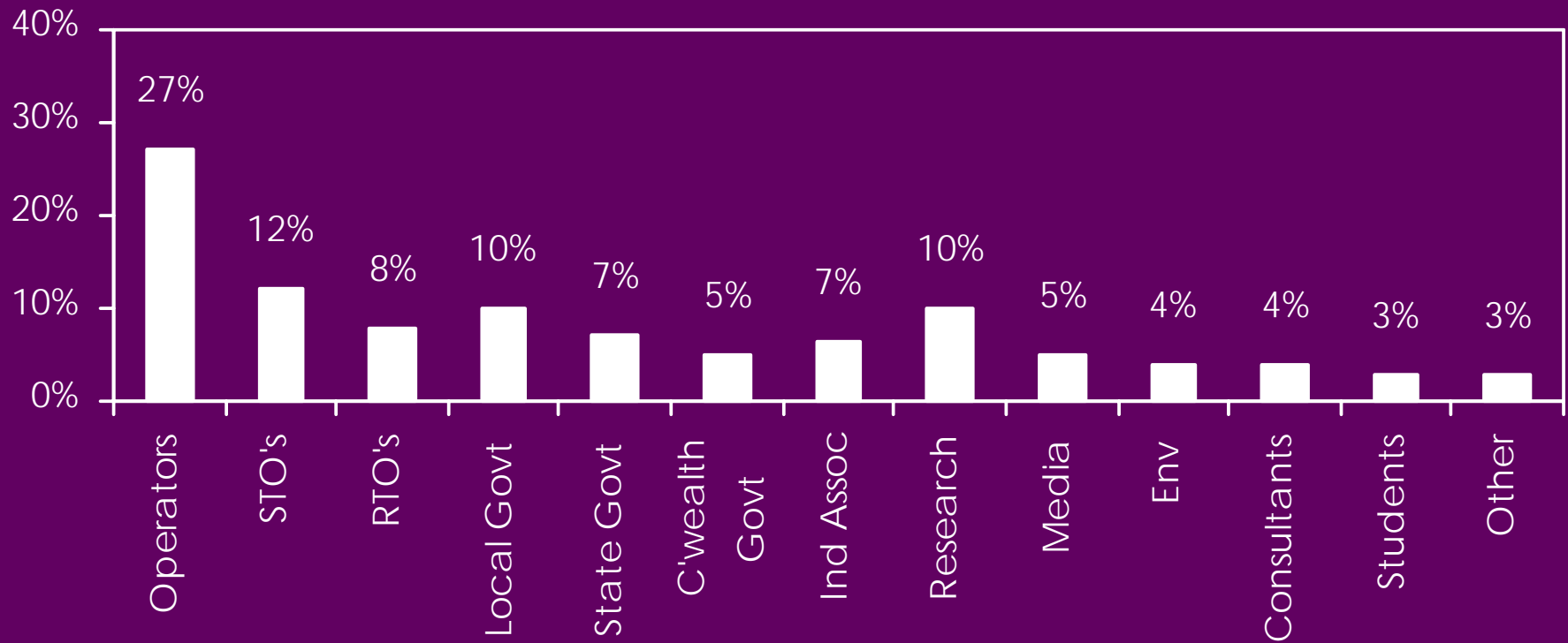
This conference targets both direct and indirect players in the tourism industry...

recognising that the tourism can only be delivered through operators and the industry working in tandem with all levels of government – and the support of host communities.

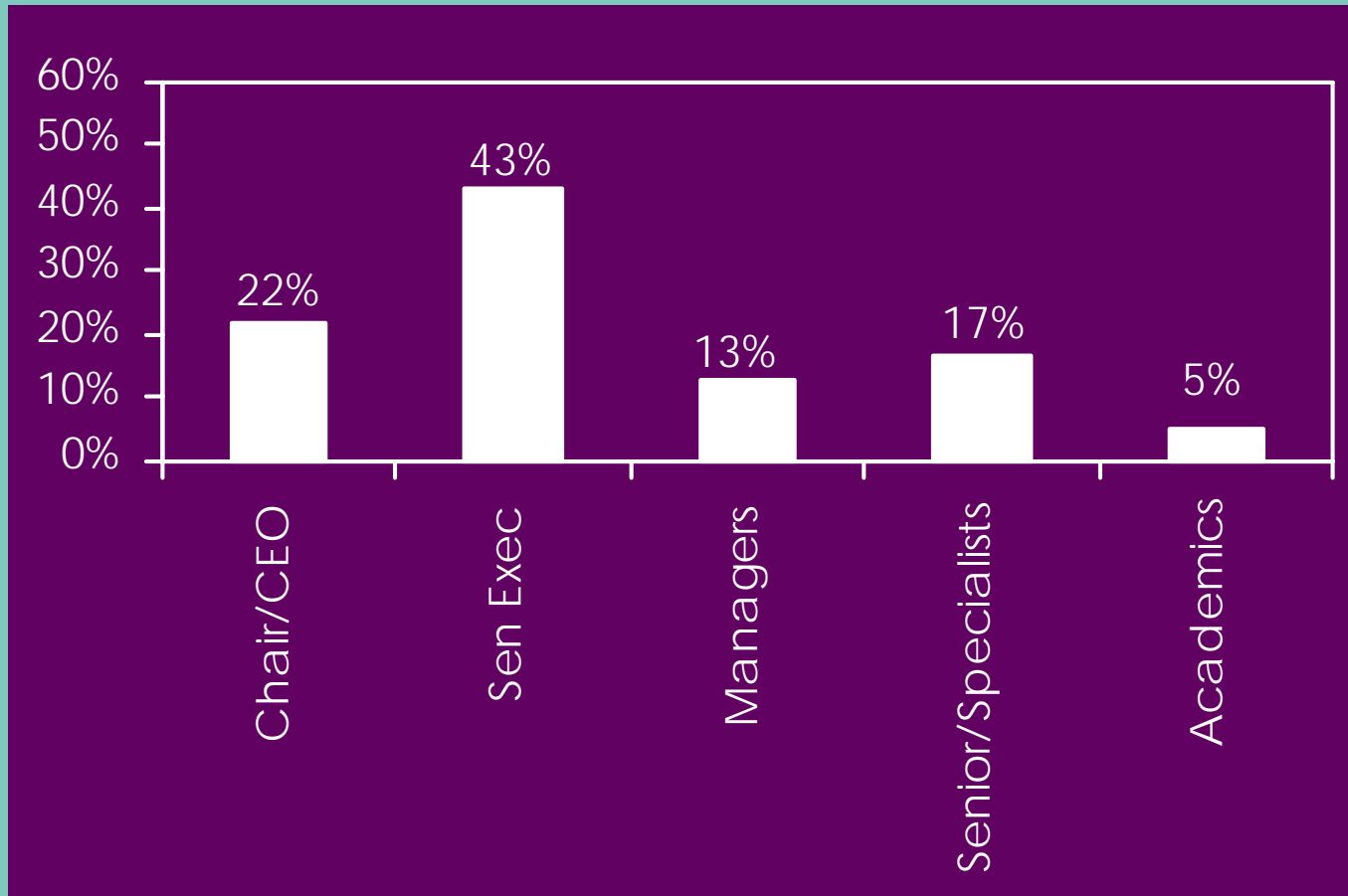
So the who and what of Tourism Futures...

375 delegates, record number attending the conference

Delegates.. who do they represent?



Delegates.. what are their roles?



The conference theme is Investing for Growth

- Let's explore all the dimensions of investment
- I encourage you to challenge convention, debate issues and look for solutions