



## SUMMARY OF STCRC RESEARCH OUTCOMES

### Contribution of tourism to communities

Tourism is a vital and fundamental contributor to Australia's national, state, regional and rural economies and communities. Directly and indirectly, tourism contributes \$68 billion annually and is responsible for directly and indirectly providing 848,000 jobs in Australia. According to Tourism Research Australia this equates to tourism contributing 6.5% to Australia's Gross Domestic Product and employing 8.3% of the Australian workforce.

Tourism supports and sustains many communities, particularly in regional and rural Australia where more than two-thirds of holidaying Australians and just under a quarter of all international visitors spend their holiday nights.

### Complexity of tourism

The diversity of the industry is evidenced by the broad range of government departments (at all levels), industry organisations and sectoral associations which represent the variety of visitor service providers.

Tourism is unique. It is not an 'industry' in the traditional sense—rather, it is defined by visitor demands and is therefore an activity that includes almost all traditional industries via products and services purchased by visitors. Additionally, there is a wide range of service businesses that rely on and support businesses in direct contact with visitors—including, for example, accountants, lawyers, pharmacists, and laundries.

### Tourism's vulnerability

Tourism is not just people taking holidays. It covers visitors to a region for purposes including business, sport, education, visiting friends and relatives and attending conferences. These activities are largely driven by discretionary expenditure. Tourism's short-, medium- and long-term sustainability is exposed to a broad range of internal and external economic, social and environmental pressures such as financial crises, exchange rates, health pandemics and the impact of climate change.

### Need for future tourism research

A new tourism CRC will undertake innovative research to inform industry and governments and to provide tools to increase productivity and competitiveness for destinations and tourism-related enterprises. In an increasingly climate change-focused world, research which informs the development of mitigation and adaptation strategies for tourism will be critical to maintain credibility with potential travellers and to reduce operating costs. STCRC will be making an application in August for a five year extension of CRC funding to continue this research beyond July 2010.

### Outcomes of STCRC research

In the last six years, STCRC has undertaken significant research on sustainable destinations, sustainable enterprises and sustainable resources. Many of the research findings have been developed into systems and tools which are being used by tourism enterprises and destinations in Australia and internationally.



### **Commercial products and services**

The outcomes of STCRC research identified as having commercial potential are developed, packaged and distributed to industry via tools and products, through STCRC's commercialisation and market extension arm, EC3 Global.

EC3 Global provides commercial products, services and professional consulting advice to over one thousand clients in 60 countries worldwide. It works with some of the largest travel and tourism corporations to service a broad range of customers from international hotel chains and tourism enterprises through to sustainable communities in Latin America and rural Australia.

### **EC3 Global provides a broad range of specialist technology and environmental products and services including:**

- Earthcheck benchmarking technology and environmental management systems (34 sectors)
- Green Globe certification (supported by Earthcheck science)
- Schools education kit (incl. Sustainability Challenge)
- Building Planning and Design Standard
- Precinct Planning and Design standard
- IPAT business information software
- Decipher information portal
- ASPIRE regional tourism management kit
- National Parks Environmental Management Systems and software

*(For further detail on these products and services refer to page 5)*

### **Tools and products developed from STCRC research have helped over 500 hotels in their first year of participation to:**

- reduce their ENERGY consumption by a total of 638,491,835 megajoules or 177,358,843 kilowatt-hours—**this equates to savings in excess of AU\$100 million**
- reduce CARBON DIOXIDE production by 355,622,800 kg—**this equates to 400 cars a day taken off the road**
- reduce WATER consumption by 12,339,760,710 litres—**nearly 5,000 Olympic size swimming pools**
- reduce WASTE sent to landfill by 814,925,143 litres—**over 12,000 shipping containers full of waste—**placed end to end they could circumnavigate the globe three and a half times.

### **Recent research**

#### **The Impact of Climate Change on Australian Tourism Destinations – developing adaptation and response strategies**

Five research teams in five tourism destinations (Kakadu National Park, Tropical North Queensland, the Blue Mountains, the Victorian Alps and the Barossa Valley) exploring the economic and non-economic impacts of climate change on tourism destinations for the periods 2020, 2050 and 2070.

- Research uptake—44 adaptation and mitigation strategies were identified that are relevant to all research destinations requiring implementation by government, industry and the community. Location-specific adaptation and mitigation strategies identified for each of the research destinations.

#### **The Carbon Footprint of Australian Tourism**

The first comprehensive measure of carbon emissions for the Australian tourism sector providing estimates and data to support national mitigation and adaptation strategies.

- Research uptake—in excess of 6500 downloads since October 2008.

## RESEARCH OUTCOMES



### **Australian State and Territory Tourism Satellite Accounts (TSAs) 2006–07 (Published)**

The first ever suite of Tourism Satellite Accounts measuring the direct and indirect contribution of tourism to Australia's states and territories.

- Research uptake—informing government and industry policy and planning with 6000+ downloads since release in November 2008.

### **Regional Tourism Satellite Accounts (Queensland)**

Delivering a suite of TSAs at the local/regional level for Queensland.

- Research uptake—providing policy makers, tourism organisations and businesses with new and reliable information on tourism's economic and employment contribution to regions. To be released prior to the end of 2009.

### **State and Federal Taxes on Tourism in Australia**

Detailed breakdown of the contribution of tourism taxes to Australia's states and territories. By capturing both taxes on tourism production and the sale of tourism products, this research provides additional details which are not included in either the Australian Bureau of Statistic's Australian Tourism Satellite Accounts or STCRC's TSAs.

- Research uptake—this research is of particular value to state tourism organisations, state and federal governments and industry associations.

### **Destination and Data Modelling – Ningaloo Collaboration Cluster**

Addressing the challenge of integrating knowledge on reef use, biodiversity and socio-economics into a management plan for Ningaloo Marine Park.

- Research uptake—The blueprint developed from this research will provide local communities with the tools to evaluate the environmental lode implications of tourism developments and activities including natural resource use, waste generation and pollution, visual impact and disturbance to fauna and flora.

## **Industry Tools**

### **Local Government Pathways to Sustainable Tourism**

This is a workshop program developed from STCRC research identifying best practice options for local government to work with stakeholders to achieve robust tourism policy and planning.

- Industry uptake
  - formal agreement with Local Government Association of Queensland and Tourism Western Australia for the delivery of regional workshops
  - current negotiations with Economic Development Australia for national delivery of the Program via their membership of Local Government CEOs and officers.

### **Accommodation Makeover Pathway Workshop**

The workshop was designed around the *Motel Makeover Guide – Renovating 3–4 Star Motels in Regional Australia*. It has been developed in partnership with the Hotel Motel and Accommodation Association. The program identifies and explores consumer demands and provides leading edge market information on planning and design.

- Industry uptake
  - regional workshops conducted by HMAA across New South Wales and Queensland attracting 400 delegates with more workshops scheduled for other states and regions during 2009
  - formal agreement with Tourism WA for the delivery of regional workshops.

### **VICkit online module**

Developed from STCRC research to help Visitor Information Centres (VICs) measure and understand their contribution to increased tourism yield in their region.

- Industry uptake—Approximately 200 VICs utilising the VICkit as part of their business management and planning process.



## Risk Management for Small Tourism Enterprises

This is an online module referenced from STCRC research and additional resources providing practical knowledge, understanding and skills for small tourism businesses to implement effective risk and crisis management. The module developed by the APEC International Centre for Sustainable Tourism (AICST) in conjunction with STCRC, is available in English, Chinese, Indonesian, Thai and Vietnamese.

- Industry uptake—123 subscribers as at July 2009 plus extensive use by the 21 countries of APEC downloaded from the APEC website.

## Encore Festival and Event Evaluation Kit

Developed from STCRC research, Encore enables organisers and sponsors (e.g. local and state governments) to assess the magnitude of new funds that are attracted to the host region and/or state as a result of a festival or event. With consistent economic evaluation it allows for event comparisons.

- Industry uptake—270 kits sold or distributed.

## Service Quality Enhancement tool

Developed from STCRC research, this easy-to-use self-assessment tool enables two and three star accommodation providers to review and assess their property's customer service performance. This tool has been developed to accommodate the operational and time constraints of small to medium tourism enterprises (SMTEs).

- Industry uptake—623 page views of the survey tool via STCRC's web portal.

## Industry reports and summary booklets

In 2008 STCRC introduced new industry snapshot reports and summary booklets which present key research to SMEs in user-friendly formats. These industry booklets bundle STCRC's research into themes providing a single resource on the latest scientific research within particular tourism fields.

- Booklet uptake—**total downloads to date exceed 16,600 with an additional 2250 hard copies distributed to key stakeholders.**

## Industry snapshot titles

- Food and Wine Tourism in Australia
- Culture and Heritage Tourism
- Accessible Tourism
- Wildlife Tourism
- Tourism within Communities: the flow of visitor expenditure through economies and industries
- Australian Antarctic and Sub-Antarctic Tourism
- The Old and the New: Success factors in cultural heritage tourism enterprise management
- Tourism and Protected Area Management
- Tourism Recovery: Impact of Bushfires on Tourism and Visitation in Alpine National Parks

## PDF downloads of STCRC reports

- Total number of PDF downloads of STCRC reports for 2008–09: 694,222
- Total number of PDF downloads of STCRC reports for 2007–08: 522,092
- Total number of PDF downloads of STCRC reports for 2006–07: 150,185

## Research reports published

- Total STCRC reports published for 2008–09 financial year: 60
- Total STCRC reports published for 2007–08 financial year: 43



### Further information on EC3 Global's products and services

**Earthcheck**—allows individuals, enterprises and governments to systematically measure, benchmark, report and manage their sustainability performance.

**Green Globe**—the international benchmarking and certification program for industry.

**Sustainable Communities Standard (incl. Sustainability Challenge)**—a worldwide program measuring and managing communities' greenhouse gas footprints and reducing their environmental impact in areas such as air pollution, water pollution, and waste to landfill. The program adopts STCRC's Community Standard to identify improvement areas and Earthcheck benchmarking to measure progress against global benchmarks and best practice.

**The Sustainability Challenge**—is a tool for schools and households to measure and track their energy, water and waste to landfill while learning about the environment and sustainability. The schools program is curriculum-based providing recognised learning outcomes while reducing the global footprint.

#### **Building Planning and Design Standard and Precinct Planning and Design Standard**

Recognising the importance of the 'life-cycle', STCRC developed a Building and Precinct Planning and Design Standard that covers all elements of environmentally sustainable design. Recognised by many leading construction firms as world-leading science, the standards can be applied to individual buildings (commercial and residential) or entire precincts, providing a platform for ongoing reductions in carbon emissions through implementation of operational measures.

**IPAT (Industry Performance Analysis Tool)**—the technology and consulting solution delivering measurable organisational improvement through the collection, storage, reporting and analysis of key performance indicators.

**Decipher**—offers a multitude of services for tourism business knowledge and research by pulling together intelligence from over 350 data suppliers including Tourism Research Australia, STOs, government agencies, and industry bodies.

**ASPIRE**—a web-based, online benchmarking model designed to highlight best-practice in a range of tourism management and marketing activities enabling tourism organisations to track their business performance against the average of other RTOs.

**National Parks Environmental Management Systems**—an online data management tool developed with the NSW National Parks and Wildlife Service to manage analyse and report on data obtained in a parks EMS framework or management system.