

- A. 2002-2006 Strategic Plan Management Structure
 - B. Measuring the Economic Value of Tourism
 - C. References

Strategic Plan 2002 - 2006
APPENDICES



APPENDIX A

MANAGEMENT STRUCTURE

Tourism Victoria Board	Steering Committee <i>(Strategic Direction)</i>	Planning Team <i>(Manage Process)</i>	Strategy Reference Group
John Morse Chairman	Chair: Wayne Kayler-Thomson Deputy Chief Executive	John Hindmarsh Project Manager	Tourism Victoria
Pamela Catty Deputy Chairperson	Lois Appleby Chief Executive	Wayne Kayler-Thomson Chairman of Steering Committee	Wayne Kayler-Thomson John Hindmarsh
Tom Smith Denise Grafton Geoffrey Conaghan Kevin Davern Bee Ho Teow Alla Wolf-Tasker Anton Staindl Judith Muir	Melanie deSouza General Manager International Markets	Paul Albone Vivienne Clare (Symbiosis Consulting) Narelle Johnson Carl Jones Belinda Reilly	David Foster Royal Melbourne Institute of Technology
	Clive Dwyer General Manager Product and Destination Marketing		Mary Hollick University of Ballarat
	Peter Keage General Manager Investment Attraction and Aviation		Leo Jago Co-operative Research Centre
	Don Richter Director of Marketing		Jeff Jarvis Monash University
	Bernie Stewart General Manager Executive Services		Brian King Victorian University of Technology
			Peter Murphy Latrobe University

Strategic Plan 2002 - 2006 APPENDICES

The Economic Value of Tourism		
	1997-1998	2001
National Gross Domestic Product	8.5% \$48 billion	N/A
National Employment	9.6% 825,000 jobs	N/A
Victorian Gross State Product	5.2% \$7.33 billion	5.2% 8.5 billion
Victorian Employment	6.2% 134,000 jobs	6.2% 144,000 jobs

Source: The Economic Contribution of Tourism Victoria to the state of Victoria, December 2001, Access Economics Pty Ltd

APPENDIX B

MEASURING THE ECONOMIC VALUE OF TOURISM

Tourism in Australia is big business. The industry makes significant contributions, both direct and indirect to the economy, creating jobs and providing a significant source of export dollars to the country. While the considerable economic benefits that tourism provides to the economy are beyond question, the industry continues to face the challenge of finding an accurate measure of its economic significance, particularly at the state level. Tourism Victoria has taken up that challenge.

Tourism is an activity that takes place in a number of industry sectors, most notably accommodation, cafes and restaurants; retail trade; transport; and personal services. It is an industry that can provide economic benefits to a broad range of industries, however the far reaching nature of the industry is also one of the key reasons that it cannot be measured as easily as other industries.

Previous results released by Tourism Victoria have been based on the work of the Bureau of Tourism Research (BTR), or derived from the Australian Bureau of Statistics' (ABS) Tourism Satellite Accounts (TSA). The TSA provided the first comprehensive statistical analysis of the direct contribution of tourism to the Australian economy, supplying levels of accuracy not otherwise available through the BTR. While both these sources have been a good indication of the economic value of tourism in Australia, neither focused specifically on the value of tourism to Victoria.

Tourism Victoria recognised the opportunity to enhance the robustness of the economic impact data for Victoria and took action. As such, Access Economics were commissioned to report on the economic contribution of tourism to the Victorian economy, using a TSA approach as adopted by the ABS. The Access Economics report contains the first near-comprehensive estimates of value added to the Victorian economy by tourism. The report uses 1997-98 figures, as these were the only results available to Access Economics at the time.

Tourism Victoria has since applied the percentages from the Access Economics to more recent state employment and Gross State Product (GSP) figures. The table on the left highlights the results. While the figures are more robust, Access Economics does however acknowledge that it is not possible to capture all of the state level value added, and as a result, the figures somewhat undervalue the economic impacts of tourism to Victoria.

It is important to note that due to significant differences in approach and methodology, the studies undertaken by BTR cannot be directly comparable with the Tourism Satellite Accounts (ABS), nor with the Victorian estimates by Access Economics. The Access Economics study does however, provide Victoria with a benchmark of robust economic data at the state level. This data will be used to track, and evaluate the economic value of tourism to Victoria in the future.

APPENDIX C

REFERENCES

Access Economics Pty Ltd (2001) *The Economic Contribution of Tourism to the state of Victoria*

Australian Bureau of Statistics (1997-1998) *Australian Tourist Satellite Accounts*

Australian Bureau of Statistics (2001) *Survey of Tourist Accommodation (STA)*

Australian Education International (2000) *Overseas Student Statistics*

Banbury E and Cooley R (1998) *Winner and grinner? The benefits gained from winning a Victorian Tourism Award*, Department of Hospitality, Tourism and Marketing, Victoria University of Technology

Buhalis D and Laws E (2001) *Tourism Distribution Channels - Practices, issues and transformations*, Continuum, London and New York

Bureau of Tourism Research, *International Visitor Survey (IVS)*, BTR, Canberra

Bureau of Tourism Research (1999) *Meetings Make Their Mark*. Occasional Paper No.26

Bureau of Tourism Research, National Visitor Survey (NVS), BTR, Canberra

Bureau of Tourism Research (2001) *Regional Tourism Employment*

Bureau of Tourism Research (1998) *Tourism Expenditure by Domestic Visitors in Regional Australia*, BTR, Canberra

Butler R (1980) *The Concept of a Tourist Area Cycle of Evolution: Implications for Management of Resource*, Canadian Geographer 25, 11:5-12

Coopers and Lybrand Consultants (1998) *Port Fairy Folk Festival - Economic Impact Study*

CRC Research (2001) *Travel for Pleasure: Understanding Australian Consumers' Buying-Consuming Experiences*. Commissioned by See Australia

CRC Tourism & Victoria University (2000) *Melbourne Convention Delegate Study*

CSIRO Research Futures Program (2000) *Insights from the coalface: A catalogue of plausible changes affecting the Australian tourism industry over coming decades*, Canberra

Darcy, S. (1998) *Tourism Patterns and Experiences of New South Wales People with a Physical Disability*, Tourism New South Wales: Sydney

Department of Communications, Information Technology and the Arts (2000) *Government Online - The Commonwealth Government's Strategy*

Department of Industry Science and Resources (2000), *tourism dotcom - A National Online Tourism Strategy*

Ernst and Young (2001) *Review of the Australian Tourism Awards*

Faulkner, B (1987) *Tourism statistics a view from the Australian experience*. Occasional Paper No.1. Bureau of Tourism Research, Canberra

Global Network, *Trend Letter March 16, 2000*

Hamal, K. (2000) *BTR Conference Paper*

Harding, A. and Robinson, M (1999) *Forecasting the Characteristics of Consumers in 2010* National Centre for Social and Economic Modelling, University of Canberra

Hunt S and Prosser G (eds) (1998) *Regional Tourism Statistics in Australia*. Occasional Paper Number 1, Centre for Regional Tourism Research, Southern Cross University, Lismore

IBIS Report (1998) *Domestic Tourism Growth Challenge 1998-2002*

ICCA data 2001

James R and Associates (1997) *Visitor satisfaction model for Victoria's national parks*. National Parks Service, Victoria

Japan Travel Bureau Report 2001

Johnson, L, Foo, L.M., Buchanan, I. and Henrick, B. (2001) *Regional Tourism Employment - A Case Study Approach*. BTR Occasional Paper Number 33. Bureau of Tourism Research, Canberra

Jupiter Communications (1999), *Online Travel Report*, New York

Kenyon, P and Black, A (eds) (2001) *Small Town Renewal - Overview and Case Studies*. Rural Industries Research and Development Corporation, Canberra

Mackay, (1997) NATSEM Forecast Report

Mackay, H. (1999) Turning point - Australians choosing their future, Macmillan, Sydney	Prosser G, Hunt S, Braithwaite D, Bonnett G, Rosemann I (2000) The Significance of Regional Tourism A Preliminary Report. Occasional Paper Number 2. Centre for Regional Tourism Research, Southern Cross University, Lismore	Taiwan Tourism Bureau, outbound market survey 2000	Western Australia Tourist Commission (2000) Partnership 21 - 2001-2001 Tourism Industry Plan
Moutinho (2000) Strategic Management in Tourism, CABI publishing, New York	Q2 Strategic Market Research (2001) Jigsaw Brochure Project, Commissioned by Tourism Victoria	Taylor D, Rosemann I, Prosser G (2000) The Effect of Accreditation on Tourism Business Performance - An Evaluation. Occasional Paper Number 3, Centre for Regional Tourism Research, Southern Cross University, Lismore	William Angliss Institute of TAFE (1999) Tourism Online Report
Natural Resources and Environment (2001) Sustainable recreation and tourism on Victoria's Public Land. Draft Policy	Rosemann I, Prosser G, Hunt S, Benecke K (2000) Promoting Awareness of the Value of Tourism A Resource Kit. Occasional Paper Number 5, Centre for Regional Tourism Research, Southern Cross University, Lismore	Taylor Nelson Sofres Australia (2001) Consolidating Learning's into the Backpacker Market. Commissioned by Tourism Victoria	Woodside et al (2001) Benchmarking Evaluation Research on the Use and Impact of Government Tourism Marketing Program's Visitor Information Guides: Final Report. Prepared for See Australia
National Office for the Information Economy (2000) Current state of Play	Roy Morgan Research, Holiday Tracking Survey	Tourism Training Victoria (2001), Victoria: E-commerce needs within the Tourism and Hospitality Industry	Woolcott Research (2000) Annual Leave Evaluation. Commissioned by See Australia
Parks Victoria (2001) Linking People and Spaces	Roy Morgan Research (2001) Travel Intentions Survey, September and October 2001. Commissioned by See Australia	Toplis, S (2001) Green and Gold? Evaluating the effectiveness of the Australian Tourism Awards in promoting ecological sustainability to the Australian Tourism Industry: A Victorian perspective. Department of Hospitality, Tourism and Leisure, RMIT University	World Travel & Tourism Council (1998) The Economic Impact of Travel and Tourism Development in the APEC
Parks Victoria (2000) state of the Parks	Roy Morgan Research Brand Health Research. Commissioned by Tourism Victoria	Tourism Forecasting Council, Forecast, October 2001	
Parks Victoria (1998) Customer Service Standards Manual	Symonds Travers Morgan (1997) Economic Contribution of Visitor Information Centres in New South Wales. A joint research project of Tourism New South Wales, Council of Tourist Associations and Australian Institute of Tourism Officers	Victorian Trails Co-ordinating Committee, Draft Victorian Trails Strategy 2001-2004	
PricewaterhouseCoopers (1998) Victorian Tourism Online - A future strategy for Victoria's Tourism Industry			
Prosser G (2000) Regional Tourism Research: A Scoping Study. Occasional Paper Number 4, Centre for Regional Tourism Research, Southern Cross University, Lismore			