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Issues in the Future Directions of Tourism in Northern Australia

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Introduction

The aim of this chapter is to raise a number of questions about the future direction of tourism in Northern Australia. As the following discussion highlights, little attention has been given to diagnosing the causes of market failure over the last decade or identifying new directions that the industry could take into the future apart from ongoing calls for additional marketing support or various forms of boosterism expenditure by the public sector. The chapter briefly considers the evidence to support the contention of market failure, examines the impact of externalities and the need for greater attention to competitiveness, examines the role of change, briefly reviews research (Prideaux, 2013a) that supports these views and suggests strategies that could be employed to address this issue. The discussion is supported by a case study that examines how many of these factors have affected the delivery of Indigenous tourism experiences in Alice Springs.

An analysis of general visitor trends in Northern Australia over the last two decades paints a picture of a tourism sector that has achieved limited growth or stagnated in some areas and is in a state of decline in others. More recently, the decline in the Australian dollar from 2014 and several new hotel developments in Cairns indicate grounds for some optimism that a new phase of growth may be possible. For most of the region, however, this is not the case. As a region, the situation looks even worse

when compared to the growth of global tourism over the corresponding period. It also appears that the future role of tourism as an economic sector in the study region needs to be re-evaluated. Decision-making in these circumstances requires an understanding of the destination's comparative and competitive advantages, level of competitiveness, realistic assessment of tourist push factors (supply-side characteristics) in existing and potential markets, realistic assessment of the drawing power of the region's pull factors (demand-side perspectives), issues related to long-term economic and environmental sustainability, the involvement of the local community and an in-depth understanding of the structure of current and possible future markets. The following discussion will highlight a range of issues that the authors feel are central to identifying the causes of this situation and suggest questions that should be addressed when the future of the tourism sector is considered from a policy perspective.

The Study Region

For the purposes of this research, the study region comprises three subregions based on state and territory political boundaries: Broome in Western Australia (WA), the entire Northern Territory (NT) and Tropical North Queensland centred on Cairns and including the Cassowary Coast Regional Council in the south, the Torres Strait Islands and Cape York and west to Burke Shire Council. State administrative control of both Broome and Tropical North Queensland is exercised by governments located in capital cities well outside the study area and all three regions are affected by decisions made in Canberra and domestic and international market forces. From a domestic tourism perspective, these subregions are generally seen, and marketed, as three distinct destinations. They also occupy a peripheral location in relation to domestic and international tourism markets.

One outcome of this policy environment is that many of the decisions that affect the study region are made within a state/territory or federal policy context where there is often limited understanding of the specific issues at a regional level and limited intergovernmental cooperation between local governments at state/territory level, between states and the territory, and between states/territory and the federal government. This situation has been described by Chaperon and Bramwell (2013) as being one of dependency where the periphery depends on the core (usually

metropolitan cities) for economic leadership. The centralisation of decision-making in capital cities that is characteristic of the public sector is usually replicated by the private sector. Centralisation of this nature limits the ability of the region as a whole to engage with and influence political and economic decision-makers.

Within the study region the main tourism destinations are Darwin and Alice Springs in the NT, Broome in WA and Cairns in Tropical North Queensland; however, significant tourism activity also occurs in areas outside of these cities. Access to the study region is generally by air for long-haul domestic and international visitors, although significant numbers of domestic visitors travel by road and in more limited numbers by coach and rail. Short-haul or intra-regional travel is generally by road.

Tourism Trends

The two-decade period from 2000 to 2020 was a turbulent period for tourism in northern Australia, a result of the loss of some international markets, the 9/11 terrorist attack on the USA, the Global Financial Crisis (2007–08), the rise and then decline in the value of the Australian dollar associated with the resources boom and, more recently, the COVID-19 pandemic. In Darwin, combined domestic and international arrivals fell from 574,000 in 2000 to 409,000 in 2016/17 before rebounding later in the decade. In the same two-decade period, global international arrivals more than doubled from 697 million in 2000 to 1.5 billion in 2019 (United Nations World Tourism Organization, 2020). In the same period international arrivals in Australia also doubled, increasing from 4.9 million in 2000 to 9.5 million in 2019 (Tourism Australia, 2020). These figures indicate that in the international market the region has rapidly lost market share over the two decades.

Although Cairns has avoided long-term decline to date, widespread coral bleaching in 2016, 2017 and 2020 highlighted the dependence of the city on the ongoing health of the Great Barrier Reef as a key destination pull factor. A report (Prideaux et al., 2018) on the impact of the 2016 and 2017 coral bleaching events found that Cairns and other coral reef-dependent destinations may experience a significant and sustained decline in international arrivals if further coral bleaching events occur in the near future.

Competitiveness, Externalities and Change

Analysis of the trends outlined above raises a number of issues that need to be addressed by the tourism sector, the public sector and the host communities who rely on tourism for employment. In economic terms, the basic issues revolve around an imbalance in demand and supply, and on a broader scale relate to the long-term ecological, and in some cases cultural, sustainability of tourism in the study area, the desire of communities to continue to promote tourism as an economic sector, government policy directions and changing consumer demand for tourism experiences.

How individual subregions respond to change is important. For example, analysis of visitor trends over the last decade indicates that previously popular experiences have experienced a decline in demand or have not been refreshed in a manner that continues to attract substantial visitor interest. In the former case, where demand has declined, the most effective response may be to develop new tourism experiences to replace the inventory of unpopular experiences. In the latter case, the most appropriate response is to rejuvenate experiences to bring them into line with contemporary market expectations.

Not all changes in demand can be attributed to changes in the way visitors wish to engage in tourism activities. From a tourism perspective, changes in air services have had a major impact in both the NT and Cairns. For example, over the last decade, Qantas and Jetstar have reduced, deleted and later reinstated many services between Cairns and Japan. Alice Springs has faced similar problems with air connectivity. The rapid growth of new domestic markets and international destinations has also had an impact as has the rapid growth in low-cost carriers in the period since 2000. A large range of externalities must also be considered, including changes in exchange rates, political uncertainties, new and sometimes disruptive technologies and a series of global crisis events. The nature of tourism markets is also changing, driven by innovation, economic growth in many developing countries and evolving consumer tastes for lifestyle experiences such as gastronomy and wellness. Collectively, these factors have impacted on the competitiveness of the tourism industry.

Movements in the value of the Australian dollar in the 2007–17 period illustrate the impact that externalities can have on tourism. The rapid rise in value of the Australian dollar from January 2007 (A\$1 = US\$0.74) reduced the competitiveness of the tourism sector both domestically and internationally. The decline in the value of the Australian dollar between January 2013 (A\$1 = US\$1.03) and January 2018 (A\$1 = US\$0.74) had the reverse effect and increased the region's competitiveness. If the region is able to take advantage of the decline in the dollar, opportunities to attract domestic tourists and capture a greater share of the international market should emerge.

A number of researchers have focused on the concept of destination competitiveness (Dwyer et al., 2000) as a way of understanding how destinations evolve. Competitiveness may be assessed in a number of ways using metrics including visitor numbers, yield, growth in bed nights, profitability and investment, or in terms of comparative and competitive advantages. Hassan (2000, p. 239) defined competitiveness as 'the destination's ability to create and integrate value-added products that sustain its resources while maintaining market position relative to competitors'. However, despite the growing interest in the notion of competitiveness a definitive model has yet to emerge, occasioning Dwyer and Kim (2003, p. 373) to comment: 'It is a complex concept because a whole range of factors account for it'. From another perspective, and one that has major implications for the study region, Ritchie and Crouch (2000, p. 5) commented that 'competitiveness is illusory without sustainability', indicating the need to closely monitor environmental carrying capacity at sensitive sites.

At a destination level, competitiveness can be described as the ability of a destination to identify its key selling propositions, identify markets that are likely to purchase these propositions, create a market space where these products are able to be purchased, identify change and future threats and have the ability to maintain this process over a long period of time in a manner that is both environmentally and economically sustainable (Prideaux et al., 2014). As consumption patterns change and consumers respond to innovation, comply with new regulatory requirements, adjust to personal and national financial conditions and adapt to ever-changing patterns of national culture and society, markets are forced to evolve or wither. In future, the need to adapt to changes in ecosystems and the visual environment driven by climate change is likely

to have profound impacts not only on how the region is marketed but how it is protected and able to be used as a tourism resource (Williams et al., 2003).

Meeting the challenges of changing patterns of demand for tourism experiences and the impact of externalities that may affect the tourism sector requires an ongoing process of regular re-evaluation of key attractions and experiences, partnerships (domestic and international), competitors, potential new markets and planning to deal with the unexpected. Failure to adopt a strategy that incorporates these elements and recognise the needs for regional, inter-regional, state and national cooperation of this type can lead to reduced competitiveness, loss of opportunities and, possibly, long-term decline. Figure 6.1 attempts to outline why it is important to take a long-term view that is informed by past and emerging trends that are apparent in the present. Seen from the perspective of the present, the future has a number of alternatives that will be based on the decisions taken in the present timespace. The direction to be taken will in part be informed by a range of constraints as illustrated in Figure 6.1. Failure to make informed decisions about a desirable future has the potential to lead to an undesirable future.

While the most widely accepted strategies for the tourism sector both domestically and internationally focus on long-term growth in visitor numbers, growth may not always be the best alternative. In setting long-term targets there is a need to also consider community views, environmental capacity and the desirability of aiming for enhanced yields and/or longer visits rather than greater visitor numbers. Given that the study region is located in the national periphery and major decisions relating to infrastructure, planning and policy are made in the core, it is often difficult for subregions to either develop in a way they consider appropriate to their specific needs or to have their voice heard in the debates that ultimately determine policy directions. Overcoming problems of this nature are not easy and require skilful negotiation.

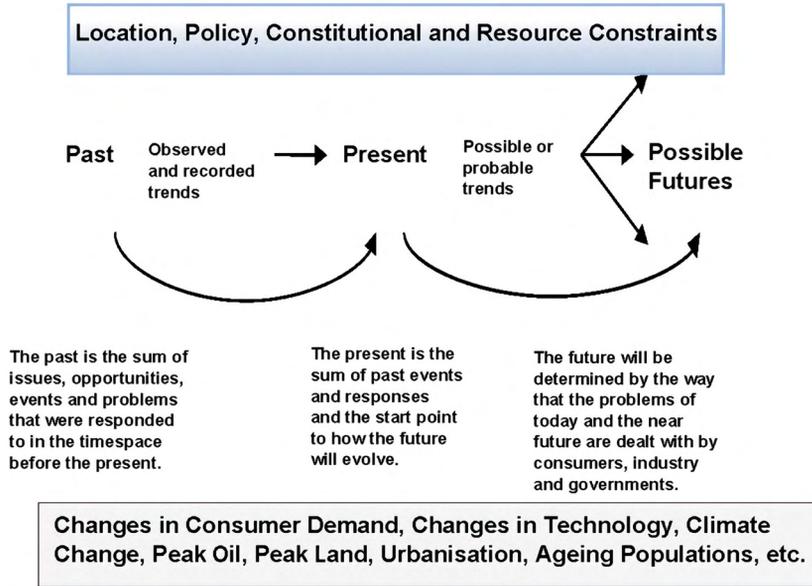


Figure 6.1: The relationship between the past, present and future in linear time.

Source: Adapted from Prideaux (2013a).

One model that may assist in understanding how a destination’s past performance has the potential to influence the future is the push–pull model. Push factors originate in the demand side and are defined as factors that encourage people to travel for reasons such as the need for rest, relaxation, adventure, prestige and social interaction (Dann, 1977). Pull factors (Dann 1977; Crompton, 1979) originate in the supply side and include features and attributes of a destination including nature, cost, heritage and landscapes (Klenosky, 2002). A number of authors (Klenosky 2002; Cha et al., 1995) have commented that while push and pull factors may be viewed as two separate groups of consumer decisions, they are actually interdependent as consumers may simultaneously be pushed by their own internal desires and pulled by the attributes of the destination. Changing consumer demand is reflected in the push side of the model while the response to changes of this type can be observed in the pull side. Failure to respond to changes in consumer push factors may result in stagnation or decline.

Understanding the complexity of the relationships that exist between consumer demand and the willingness of destinations to refresh existing products and infrastructure and create new products is an essential start point for applying the model to the study region in the near future. Given the options that exist for future directions of both public and private sector investment, some understanding of the options available for the future is essential.

Tourism Sector Stakeholder Views

A 2013 report (Prideaux, 2013a) examined the views of industry, government and academic respondents about the long-term environmental and economic issues facing the study region. Interviews were conducted in Darwin, Broome, Brisbane, Alice Springs, Brisbane, Gold Coast, Perth and Canberra. Results indicated that, with few exceptions, innovation has largely stalled and that overall there was a limited vision of the future mainly because of the reactive nature of the tourism industry's responses to market stagnation over the last decade. This is in stark contrast to the two decades commencing in 1980 when significant private and public investment underpinned the rapid growth of nature-based tourism across the study region. Since the publication of the report, the value of the Australian dollar has declined, enhancing the competitiveness of the region. However, the threat of future coral bleaching events and possible loss of the Chinese inbound market post COVID-19 may inhibit further growth unless new tourism experiences are developed.

Overall, however, the current situation is best summed up by the following statement:

There appears to be a reluctance to accept that past plans and policies had failed to ignite growth or that the region's traditional product mix largely based on nature based tourism has consistently failed to stimulate a new phase of growth. The need for new activities and experiences to augment the study region's current suite of environmental experiences has not been widely recognised. (Prideaux, 2013a, p. 37)

Until the imbalance between the region's main pull factors and consumers' push factors is addressed, stagnation or decline will define the sector into the future.

Other points highlighted in the report (p. 38) include:

- the region's natural environment is currently being used in a sustainable manner
- there are concerns that insufficient resources have been allocated to the ongoing maintenance of the region's protected areas including combatting the Crown of Thorns Starfish, which can dramatically reduce coral cover, and control of invasive species such as crazy ants, which may adversely affect rainforest ecosystems
- as ecosystem resilience levels decline with increasing global warming, adjustments will need to be made to protected area boundaries to accommodate in and out migration of affected flora and fauna
- the potential for tourism may be affected as the carrying capacity of ecosystems decline
- there is a mismatch between consumer demand and what some subregions supply
- continued reliance on the region's ecosystems to attract tourists may lead to continuing decline, particularly if climate change begins to reduce the resilience of the region's ecosystems
- the long-term health of the region's tourism economy in part depends on the health of the region's ecosystem.

Previous research (McNamara & Prideaux, 2011) has highlighted the centrality of nature to the tourism experiences marketed by the tourism sector in Northern Australia. This being the case, the region faces either a situation where its natural experiences have become less appealing than in the past or the manner in which nature is presented is dated and needs to be refreshed. In Northern Australia, both trends appear to be occurring. In the NT, the decline in interest in nature-based experiences is demonstrated in Kakadu National Park where visitation has been steadily declining since the financial crisis of 2008. The following case study highlights the dilemma facing the region's tourism industry and also illustrates the type of solutions that may be required to reboot the tourism sector.

Case Study: Alice Springs

This case study focuses on the area that includes Alice Springs Town, Central Desert Shire, McDonnell Range Shire and Yulara Management Area. Alice Springs has suffered a significant fall in international tourist arrivals in the past two decades with bed nights falling from 850,000 in 2010/11 to 445,00 in 2019/20 (Regional Development Australia, n.d.) Over the same period there was a very small increase in domestic bed nights from 925,000 to 1,060,000. Carson et al. (2012) attributed the decline in the city's tourism industry to its peripheral position, poorly defined marketing that has failed to recognise shifts in demand from mass tourism experiences to more niche experiences, a failure of the destination's large investors to rejuvenate their facilities and increasing social problems that have received international media coverage. Early in the first decade of this century, Alice Springs and the Petermann region ranked in the top 10 cultural tourism destinations for international visitors in Australia (Hossain et al., 2005).

Surprisingly, later research (Zeng et al., 2010) found that Indigenous culture was not included in the top attractions of the area. Although absent from the top of tourists' to-do lists, international visitors generally place a higher value on Indigenous culture and heritage than domestic visitors (Zeng et al., 2010). This in part supports the argument that developing Indigenous cultural tourism products is crucial for the international market. However, as international visitors comprise nearly a third of total visitors, there remains a need to balance cultural and nature-based tourism to both increase the area's attractiveness to international visitors and its appeal to domestic visitors.

Although many tourists have high expectations of experiencing Indigenous art and culture, a lack of engaging cultural experiences can lead to lower visitor satisfaction. Lack of access and information available on Indigenous cultural products and services might be one reason (Nielson Research, 2007). The dilemma here is that once tourists come to the region to seek Indigenous cultural experiences, they find themselves surrounded by Indigenous people but find it difficult to access Indigenous culture and daily life. This also suggests that the destination has not fully marketed its cultural dimensions and there has been an absence of culture-related tourism products. It might also point to a situation where many visitors do not fully realise the embodied cultural dimension of natural assets

(e.g. the substantial association between Uluru and Indigenous culture). There also appears to be some difficulties in connecting Indigenous culture with natural assets. As a consequence, Indigenous culture is underproduced and opportunities for cultural experiences by visitors (especially for cultural visitors) are compromised. Indigenous culture is a part of real life in the region. One solution is to develop tourism experiences that broaden opportunities for engagement with Indigenous people. This could close the information asymmetry between tourism enterprises and tourists leading to a disconnection between supply and demands appears to be a problem.

In summary, market failure is evident through products failing to meet the expectations of some market segments; the disconnection and poor communication between products, services and tourists; and tourism marketing that seems not to engage local communities. There is also a clear disconnection between tourism markets and destination marketing.

While nature-based tourism is likely to continue to dominate, culture-based tourism can be developed as a complementary experience. The strategic development of both would provide an enhanced pull factor for the region and satisfy unmet demand suggesting scope for new products to supplement existing nature-based tourism.

The development of Indigenous cultural tourism products will require a shift from an emphasis on Indigenous artefacts to Indigenous cultural tours and interactive activities that integrate their cultural perspectives into specific landscapes or locations. A change of this nature will provide value-added products and generate benefits to Indigenous communities. Moreover, Indigenous tourism activity should not be seen as just activities that provide Indigenous experiences. Participation should be much broader and encompass the entire range of activities that constitute the tourism product.

In relation to Indigenous tourism, a participatory mechanism for local communities to engage in and benefit from tourism is critical. Enhancing opportunities for local Indigenous culture to contribute to tourism will not only encourage local Indigenous communities to participate in the tourism sector but will also appeal to cultural tourists and make a positive contribution to visitor numbers and expenditure.

To move forward on these issues will require identifying and acting on the causes of market failure (Carson et al., 2012). As part of this process, out-of-region research is required to identify how the region can use its comparative and competitive advantages to develop attractive pull factors that will appeal to contemporary visitors. This should be underpinned by consensus within the local community and Traditional Owners about the future ‘look’ of the regions’ tourism industry. The next step will be to attract new investment and then promote the destination in appropriate market places.

The Relationship between Change and the Future

Given that most of the study region’s current stock of tourism experiences are nature centred, strategies for future development will need to consider long-term environmental sustainability as a key policy objective. Figure 6.1 highlighted the need to recognise the role of change. In the study region, three parallel though connected groups of change are occurring. The most obvious is the shift in consumer demand or push factors that have led to the current decline in demand for visiting some parts of the region. The second change that is beginning to occur is climate change, with evidence already emerging that elements of the future ecosystem will be different from those of the present. These changes, such as widespread coral bleaching on the Great Barrier Reef in 2016, 2017 and 2020, will necessitate a re-evaluation of the capacity of the future ecosystem to be used as a tourism experience. The third change is less obvious and concerns the conditions that have shaped human society in the past and will reshape society in the future (Prideaux, 2013b). Factors that will reshape the future include the transition to a net zero carbon economy, climate change, rapid urbanisation, ageing society, disruptive technologies such as autonomous electric vehicles and peaks such as peak land and peak water (see Figure 6.1).

The first group of changes focused on consumer push factors and is the most immediate and perhaps the easiest to deal with. Changing demand patterns for the consumption of natural experiences is one factor that has yet to be given serious attention. Most visitors to the region are from cities where nature takes a very different form to that experienced in the study region. Urban nature is manicured, ordered, constructed and

non-threatening. Nature in the study region is the complete opposite—chaotic, untamed and, in some areas, threatening. Reconciling the two realities of nature, the tamed nature of the city and the untamed nature of the bush, creates a central dilemma for the region's tourism industry but must be addressed to deal effectively with the expectations of nature and how it is enjoyed by city dwellers. This will require the development of new products to enable urbanites to experience tropical nature within their personal comfort zones. From the push perspective of the region's visitors, there is an expectation that the region will provide at least similar levels of the lifestyle amenities that define everyday life in the city in areas such as dining experiences, coffee, shopping, entertainment, access to Wi-Fi and so on. Failure to offer lifestyle amenities at least at a level equivalent to the city not only reduces competitiveness vis-a-vis competing destinations but may also give an impression of backwardness. In this sense, the solution to identifying and rectifying some of the region's current problems lies in understanding the customer, where they come from and their expectations. Responding to these will require a re-engineering of the product offerings and experiences of the tourism sector in the study region. This might not be overly difficult and could, for example, start with relatively easy-to-implement initiatives such as service training for staff; re-engineering menus; rethinking product offerings in shops; and enhanced public amenities, opening hours and length of tours. It is already apparent that many businesses in the region have recognised this need, hence the growing number of personal services businesses such as wellness experiences.

Change is often a disruptive force that affects long-term demand and supply relationships and causes rapid shifts in the equilibrium position of the tourism sector. As demand and supply relationships change, new windows of opportunities emerge, some of which will replace previous markets. The shape of the future will arguably be ongoing interplay between change and at least four groups of drivers (Prideaux, 2013a):

1. The structure of contemporary society including governmental structures, institutions, society, legal systems, national culture and economy. The interplay of these factors provides the framework around which problems are identified, responded to and evaluated.
2. The version of the future that contemporary society and industry has adopted as its preferred course of progress. Without a vision of a preferred future, response to change is likely to be ad hoc and may

not deliver the desired results. Agreement on a specific version of the future creates a set of targets that can guide how the issues of today are addressed.

3. The manner in which change affects societies. The process of identifying change and recognising ongoing implications is important but often ignored until it is too late to channel change in a positive manner.
4. How society responds to change. Responses will include policy adjustments, investment by both the private and public sectors, innovation and adjustment of lifestyles.

To these need to be added a fifth external driver linked to climate change, which will eventually affect all human systems and force rapid adjustments to economic and social systems and urban settlement patterns. The change likely to occur in global economic production systems is a transition to a net zero carbon economy such as the circular economy based on renewable energy sources and extensive recycling.

Discussion and Conclusion

It is apparent that stakeholders in the region need to consider how to respond to the problems that currently exist, and the responses to them will create, or extinguish, options for a different future. As part of this response a range of questions (Prideaux, 2013a) need to be considered by the public and private sectors and the region's community in relation to how the study region may respond to current visitor trends and to the changes that are currently taking place:

1. Why has anticipated growth largely failed to occur?
2. Is further growth achievable?
3. Is growth necessarily the best course for the future?
4. In the future, what externalities will have the greatest impact on tourism markets?
5. If growth is the best option, how can the study region's competitive position be strengthened?

These questions need to be addressed prior to further strategy development and will not be a simple task because the tourism sector has yet to accept the need for rejuvenation and the public sector has failed to recognise that the

appeal of nature needs to be re-evaluated and presented in a form that appeals to contemporary consumers. Fundamental to any strategies and initiatives by either the public or private sectors is the need to understand the contemporary visitor and provide them with experiences they desire. This is not an easy task, particularly as visitor tastes are constantly changing. As of 2020, it appears that some parts of the region continue to experience difficulties in responding to changing customer expectations. Rectifying this situation will require action at both a strategic level and tactical level. At the strategic level, actions should include determining the long-term role of tourism in the regional economy and building appropriate infrastructure. At the tactical level, actions may include refurbishing existing infrastructure and marketing. Enablers required to achieve strategic and tactical objectives include funding to investigate new markets, building a visitor monitoring system that enables early detection of changes in demand and encouragement of the supply side to respond to changes in tourism demand by changing their product offering.

Irrespective of the direction that is determined to be the most appropriate for the region, a number of actions are required to guide the strategies that are adopted:

- develop a vision for the tourism industry that recognises its unique culture, landscapes, ecosystems and the quality of supporting infrastructure including attractions, accommodation and food and beverage infrastructure
- develop an intergovernmental and multi-sector mechanism for strategy coordination at regional, state and national levels
- establish a research capability able to support the region's tourism industry including the identification of new visitor markets and experiences such as Indigenous culture
- establish an ongoing monitoring mechanism to provide feedback on current trends.

Failure to incorporate these actions into future planning runs the risk of the future mirroring the past with destination pull factors failing to align with consumer push factors and below optimum levels of competitiveness.

The aim of this chapter was to raise a series of questions about the future direction of tourism in Northern Australia. As the discussion has indicated, part of the problem for the region as a whole is a collective failure to adequately respond to changing visitor demands. Responding to change

will require the region as a whole to rethink the way it structures and delivers its experiences and visitor services. However, as the chapter argues, change is an ongoing process and for the region to both meet the challenge of change and to thrive in a future world that is constantly undergoing new threats and new challenges the region must first determine the future shape of its tourism sector and then establish and manage a pathway to the future that is forward thinking, rather than reactive.

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