

**POTENTIAL IMPACTS OF DEMOGRAPHIC CHANGE ON DOMESTIC TOURISM  
DEMAND IN THE YEAR 2021 – A DELPHI STUDY**

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**ABSTRACT**

Demographic change has been identified as a key driver of future tourism demand. This research employed a Delphi study amongst representatives of public and private tourism organisations in Queensland to identify potential impacts of population growth, population ageing and changing family structures on aspects of domestic tourism demand. The results show that demographic change influences, amongst others, the timing and duration of holidays, the financial resources allocated for tourism, the choice of destinations, and the type of activities undertaken. While some impacts of demographic change may be predicted with higher certainty than others, it is vital for tourism organisations to include elements of slow change such as demographics into long-term planning processes and to consider that some elements of change may be less certain than they appear. It is recommended that forecasting processes become more flexible to incorporate such uncertainties.

**Keywords:** Population ageing, Queensland, Delphi, family structure

**INTRODUCTION**

In recent years, aspects of demographic change have influenced the debate on a range of issues including the potential impacts of an ageing Australian population, significant population growth in Southeast Queensland, changing family structures due to delayed family formation, growing divorce rates and an increasing number of childless couples. The direction and consistency of such demographic trends is likely to strongly influence the shape of our future including domestic tourism demand. Tourism demand has changed over time and today's tourists expect and request products and services that are different from those that were common and accepted in the past. This trend will continue into the future thus it is prudent for the tourism industry to undertake research into the anticipated need for tourism products and services based on those demographic changes.

This research presents the findings of a Delphi study conducted between July and September 2005 that examined potential effects of population ageing, population growth and changing family structures on domestic tourism demand in Queensland by the year 2021. While it has to be acknowledged that other external factors, such as technological innovation, economic development, and political stability also play a role in determining tourism demand, the emphasis of this study lies on demographic change. The reason for this focus is the lack of attention that demographic change has received in the past as a driver for changing tourism demand. While the short-term effects of population ageing are discussed in the literature, longer-range analysis of the implications of these trends has not been undertaken. For population growth and changing family structures, the research gap applies to both potential short- and long-term effects on tourism demand.

**THE SIGNIFICANCE OF DEMOGRAPHIC CHANGE FOR TOURISM DEMAND**

Demographic and social characteristics have been recognised as an important variable of tourism demand alongside economic factors, technological advancements, investment, political, legislative and regulatory developments, environmental planning, trading agreements and safety of travel (World Tourism Organization, 1995). Many tourism surveys include demographic

variables because they can be collected easily and they are closely related to specific behaviours (Weaver & Oppermann, 2000). Martin and Mason (1998) argue that economic, social and technological change have an impact on individual leisure demand and activity because external variables affect the availability of time, money and the choice of place. Applied in a tourism context, this means that changes within the external variables identified above impact on the time and financial resources which individuals have available for tourism purposes as well as influencing their choice of destination and tourism activities. Dwyer (Dwyer, 2005, p. 542) suggests that "The main challenge for the tourism industry is to develop products and services that meet the changing needs of the customer." This reflects the philosophy of the marketing concept (Levitt, 1960) which implies that the analysis of consumer needs precedes the design of marketing strategies, including product development (Kotler, Armstrong, Brown, & Adam, 1998). Following this philosophy, tourism providers must adapt their products, services and destinations to accommodate the changing demand that follows from external change.

Given the relevance of demographic factors for tourism demand, it can be assumed that a change in the demographic composition and characteristics of a society will influence the travel demand patterns of that society. Demographic change is considered a powerful source of change (McRae, 1995) that, according to (Ryan & Trauer, 2005, p. 510), signals long-term warning of transitions that will occur in the future. While the consideration of demographic characteristics is unlikely to have an immediate effect on a company's financial results, in the medium- to long-term it may become critical (Foot, 1996). The OECD (1979) warned that the impact of population changes may be easily overlooked because such changes are slow and gradual. Projections published by the Australian Bureau of Statistics (ABS) reveal that demographic change may produce a significantly different composition of the Australian population by 2021.

#### **PROJECTED DEMOGRAPHIC CHANGE IN QUEENSLAND AND AUSTRALIA**

In addition to publishing current statistics, the ABS produces long-term projections of demographic developments in Australia. Three series are calculated under different sets of assumptions, which are referred to as projections rather than forecasts (Australian Bureau of Statistics, 1999, 2003). These series were used as the basis for the research undertaken for this paper.

Nationally, the population is projected to reach between 22.3 million and 24.5 million in 2021, compared with 19.6 million in 2002. Queensland is expected to be the fastest growing state in Australia, rising from 3.7 million (2002) to between 4.6 million and 5.4 million (2021). This represents an increase of 23.4% to 46.1%. Southeast Queensland is projected to account for two-thirds of the state's population growth (Australian Bureau of Statistics, 2003).

Population ageing represents the most significant variable of demographic change. In Australia, the proportion of people aged 65 years and older is projected to increase from 12.7% in 2002 to between 18.5% and 19.8% by 2021, which represent an increase of approximately 2 million people in that age group. At the same time, the proportion of children (up to 14 years old) is projected to fall from 20.3% to between 14.4% and 17.5%. The resulting structural ageing process is reflected in the median age of the Australian population, which is expected to increase from 35.9 years in 2002 to between 40.4 and 42.3 years in 2021 (Australian Bureau of Statistics, 2003).

In Queensland, the median age is projected to increase from 35.3 years in 2002 to between 39.7 and 42.4 years in 2021. This is partly due to the anticipated increase of the population aged 65 and over, which is expected to at least double from 2002 to 2021. The nominal growth also translates into a growing proportion of the older population. Between 17.5% and 19.6% Queenslanders are expected to belong to the 65+ category by 2021 in comparison with 11.8% in 2002. At the same time, the proportion of children is expected to fall from 21% (2002) to between 14.7% and 18.1% (2021) (Australian Bureau of Statistics, 2003).

In Queensland, the number of households is expected to grow at a rate similar to the Australian average, which is projected at 35% to 46% from 1996 to 2021. This is not only due to the growing population but is also the result of a decline in the average household size. From an average of 2.6 people per household in 1996, a decline to 2.2 to 2.3 (2021) is anticipated in Australia, while Queensland's household size may fall to 2.2 to 2.4. Couples without children are expected to become the most common family type by 2016 (Australian Bureau of Statistics, 1999). Given these projections, it is not difficult to imagine that demographic change is likely to have an impact on domestic tourism demand in Queensland.

## **METHODOLOGY**

A Delphi study was conducted amongst senior managers from Queensland's tourism industry, the Department of Tourism, Fair Trading and Wine Industry Development, Tourism Queensland and the Regional Tourism Organisations. Using an iterative process with controlled feedback, a Delphi study aims to achieve the highest possible consensus between respondents without the need of them to physically meet. While individual respondents have the opportunity to change their views in order to recognise other respondents' opinions, unlike in group interviews, interaction and direct mutual influences are avoided (Dalkey, Rourke, Lewis, & Snyder, 1972). Delphi studies are a recognised tool for strategic forecasting and have been used by a number of researchers (Cunliffe, 2002; Edgell, Seely, & Iglarsh, 1980; Green, Hunter, & Moore, 1990; Kaynak & Macaulay, 1984; Liu, 1988; Yong, Keng, & Leng, 1989) for the purpose of forecasting tourism developments. In the research reported here respondents were selected from industry, government, as well as state and regional tourism organisations to include a wide range of opinions. This approach ensured that a wider policy and planning perspective was represented in addition to issues that may arise from the daily operational perspective of business managers. This research design recognises that different results might have been achieved if participation had been limited to either private or public sector representatives.

The participants in this study were asked to rate, on a scale from one to six, the likelihood of a range of possible developments in domestic tourism demand that may follow from population ageing, population growth and changing family structures by the year 2021. The statements to be rated were derived from secondary data and previously conducted focus group interviews. A total of twenty-two completed questionnaires were received and included in the analysis. In a second round, respondents were asked to re-consider some of their answers. These included those for which low consensus had been achieved in the previous round and those for which respondents' previous answer had differed significantly from that of the majority of participants. In addition, respondents were asked to provide a reason for their rating. Eighteen of the twenty-two second-round questionnaires were returned. The study was limited to two rounds on the basis of Woudenberg's (1991) recommendations which found that most improvements of consensus take place between the first and second round. The level of consensus was determined through a count of responses in each likelihood range (unlikely: ratings 1-3; likely: ratings 4-6), the first and third interquartile of responses, as well as the mean rating.

## **RESULTS**

The statements which achieved high consensus after only one round suggest that the impacts of demographic change can be anticipated with relative certainty. However, despite receiving feedback of the previous rounds' results, some respondents continued to disagree with the majority vote. This suggests that despite an implied certainty strong opposition exists regarding the general expectations for some aspects of tourism demand. In addition, a significant number of statements achieved low consensus, even after two rounds, which implies that those potential consequences may be more uncertain. The group of relatively certain developments will be presented first before discussing those of greater uncertainty.

For twelve statements all respondents' ratings lay either in the unlikely (1-3) or the likely (4-6) range of answers and for four further statements a maximum of two respondents disagreed with

the majority. These numbers imply comparatively high certainty with regards to these potential impacts on tourism demand. Opposite statements received opposite ratings thus supporting the perception of relative certainty regarding these impacts. Domestic tourism demand in Queensland was expected to increase in a number of areas due to population growth. These included demand for Tropical North Queensland, interstate demand to Southeast Queensland, and short-breaks in Southeast Queensland. At the same time, the increasing number of people living in Queensland was also regarded as a source for increased travel to interstate destinations. Higher visitation to Queensland from other states and increased demand for coastal destinations were considered likely effects of population ageing. Finally, nature-based tourism may become more popular due to changing family structures. The detailed results are presented in Table 1.

**Table 1**  
**Statistics for high consensus statements**

Statement	Mean	1st quartile	3rd quartile	Count unlikely (1-3)	Count likely (4-6)
<b>As a result of population ageing ....</b>					
Coastal domestic tourism demand will grow.	4.91	4.25	5	0	22
Coastal domestic tourism demand will decline.	2.6	2	3	20	2
Interstate visitation to Queensland will grow.	5.1	5	5.75	0	22
Interstate visitation to Queensland will decline.	2.1	1	3	22	0
<b>As a result of changing family structures ...</b>					
Domestic demand for nature-based tourism will grow.	4.82	4	5	0	22
Domestic demand for nature-based tourism will decline.	2.18	2	3	22	0
<b>As a result of population growth and migration ...</b>					
Tourism demand in tropical North Queensland by Non-Queenslanders will grow.	4.55	4	5	0	22
Tourism demand in tropical North Queensland by Non-Queenslanders will decline.	2.55	2	3	22	0
Tourism demand by Non-Queenslanders in Southeast Queensland will grow.	4.36	4	5	0	22
Tourism demand by Non-Queenslanders in Southeast Queensland will decline.	2.64	2	3	21	1
Tourism demand in Tropical North Queensland by Queenslanders will grow.	4.32	4	5	2	20
Tourism demand in Tropical North Queensland by Queenslanders will decline.	2.55	2	3	22	0
The number of domestic short breaks (up to 4 days) in Southeast Queensland will grow.	4.64	4	5	0	22
The number of domestic short breaks (up to 4 days) in Southeast Queensland will decline.	2.45	2	3	22	0
Tourism demand by Queenslanders to interstate destinations will grow.	4.41	4	5	1	21
Tourism demand by Queenslanders to interstate destinations will decline.	2.6	2	3	22	0

For a total of fifty-eight impact statements, relatively high consensus existed after the first round shown by the first and third interquartile lying in the same likelihood range of answers. However, some respondents disagreed with the majority. They were asked to re-consider the respective statements and to provide a reason for their rating in the second round. Just over one out of four (27.3%) re-rated statements was changed in the second round. It is assumed that respondents felt very strongly about those statements for which they did not change their ratings although their opinion opposed that of the majority. These statements included the likelihood for population ageing to affect the demand for luxury product, tourism demand for the Gold Coast including a shift of demand to other coastal destinations, the average length of holidays, the number of holidays and short-breaks taken, as well as the demand for resort-style accommodation and caravanning holidays.

Some respondents also assessed some effects of population growth and migration on domestic tourism demand differently than the majority. These included a potential shift of visitation from the Gold Coast to other coastal destinations, non-coastal tourism demand, intrastate demand for Southeast Queensland, and the number of holidays of four and more days.

Finally, changing family structures received some controversial responses regarding their impact on the importance of quality, and the demand for budget tourism products, self-catering accommodation and drive holidays. The reasons that were provided by respondents for the statements they rated contrary to the majority are listed in Table 2.

**Table 2**  
**Reasons for statements that differed from the majority**

<p><i>As a result of population ageing,</i></p> <ul style="list-style-type: none"> <li>• domestic demand for luxury products is unlikely to grow. <ul style="list-style-type: none"> <li>○ emphasis on value for money and extended length of stay</li> <li>○ possible price sensitivity by retirees</li> </ul> </li> <li>• a shift from the Gold Coast to other coastal destinations is unlikely. <ul style="list-style-type: none"> <li>○ accessibility and infrastructure of the Gold Coast</li> <li>○ diversity of markets the Gold Coast attracts, product depth</li> </ul> </li> <li>• domestic demand on the Gold Coast is likely to decline. <ul style="list-style-type: none"> <li>○ marketing message not translating the actual products on offer.</li> </ul> </li> <li>• the average length of domestic holidays is unlikely to decrease. <ul style="list-style-type: none"> <li>○ increase in caravan travel that fosters longer holidays</li> </ul> </li> <li>• the number of domestic short-breaks (1-4 days) is likely to decline. <ul style="list-style-type: none"> <li>○ ageing work force to shift to long-haul and caravanning</li> </ul> </li> <li>• the number of domestic holiday trips overall is likely to decline. <ul style="list-style-type: none"> <li>○ current decline in domestic holidays</li> <li>○ desire to travel overseas (young Australians and backpackers)</li> <li>○ migrants saving for trip home or relocation of rest of family to Australia</li> </ul> </li> <li>• domestic demand for resort-style accommodation is unlikely to grow. <ul style="list-style-type: none"> <li>○ possible price-sensitivity by retirees.</li> </ul> </li> <li>• domestic demand for caravan tourism is unlikely to grow. <ul style="list-style-type: none"> <li>○ baby boomers' apparent lack of interest in caravanning</li> <li>○ increase of other opportunities</li> </ul> </li> </ul>
<p><i>As a result of population growth and migration,</i></p> <ul style="list-style-type: none"> <li>• domestic demand is unlikely to shift from the Gold Coast to other coastal destinations. <ul style="list-style-type: none"> <li>○ existing accessibility and infrastructure of the Gold Coast</li> </ul> </li> <li>• intrastate demand in Southeast Queensland is likely to grow. <ul style="list-style-type: none"> <li>○ tourism infrastructure, accessibility, destination awareness</li> <li>○ increased variety of options</li> </ul> </li> <li>• non-coastal domestic tourism is unlikely to grow. <ul style="list-style-type: none"> <li>○ psychological needs delivered by beach holiday</li> <li>○ already in decline</li> </ul> </li> <li>• the number of domestic long holidays (over 4 days) is likely to decline. <ul style="list-style-type: none"> <li>○ affordability of short-breaks, VFR</li> <li>○ tougher economic times and lack of time</li> </ul> </li> </ul>
<p><i>As a result of changing family structures,</i></p> <ul style="list-style-type: none"> <li>• the importance of quality for tourism products is likely to decline. <ul style="list-style-type: none"> <li>○ variety to replace quality</li> </ul> </li> <li>• domestic demand for budget tourism products is likely to decline. <ul style="list-style-type: none"> <li>○ price not critical for couples without children</li> <li>○ smaller number of families</li> <li>○ desire for relaxation and being pampered in luxury environment</li> </ul> </li> <li>• domestic demand for self-catering accommodation is unlikely to grow. <ul style="list-style-type: none"> <li>○ couples with more disposable income used to eating out</li> </ul> </li> <li>• domestic demand for drive holidays is unlikely to grow. <ul style="list-style-type: none"> <li>○ traffic congestions, time constraints</li> <li>○ dual family income, more disposable income</li> <li>○ demand for short-breaks</li> </ul> </li> </ul>

**COMPARATIVELY UNCERTAIN IMPACTS OF DEMOGRAPHIC CHANGE**

For all aspects of demographic change explored in this study a number of impact statements achieved only low consensus after two rounds. These included the likelihood of a potential shift from domestic to international holidays and vice-versa as a result of population ageing, the decline or growth of demand for child-friendly accommodation following a change of family structures, and a possible shift from coastal to non-coastal holidays due to population growth. The demand for holidays of four or more days' duration and the importance of price were two further impacts for which different views existed regarding the effects of population ageing and changing family structures. The impact statements addressing these aspects received mean scores of around 3.5 and a relatively balanced distribution of "unlikely" and "likely" ratings. At the same time, the first and third interquartile of responses fell into opposite likelihood ranges. The detailed list of means, first and third quartiles as well as likely and unlikely counts for all statements are outlined in Table 3.

The reasons respondents provided for those ratings reveal different underlying beliefs. For example, population ageing was considered an unlikely reason for a shift from domestic to international holidays because of a perceived preference amongst the older population for familiar and known destinations. Furthermore, price, security and health issues were understood to form travel barriers for the older generation. In contrast, the shift was regarded likely due to younger, wealthier and time-richer retirees and the potential to boast about an international holiday. While some respondents believed that future retirees would be reluctant to travel internationally, others expected that the older travellers were more likely to engage in overseas travel because of being more educated and affluent than the current retirees.

**Table 3**  
**Statistics for statements with low consensus**

<b>As a result of population ageing ...</b>		<b>Round 1</b>	<b>Round 2</b>
There will be a shift from domestic to international holidays.	Mean	3.68	3.6
	First quartile	3	3
	Third quartile	4	4
	Count unlikely (1-3)	9	8
	Count likely (4-6)	13	10
There will be a shift from international to domestic holidays.	Mean	3.32	3.33
	First quartile	3	3
	Third quartile	4	3.75
	Count unlikely (1-3)	15	13
	Count likely (4-6)	7	5
The number of domestic long holidays (more than 4 days) will decline.	Mean	3.36	3.39
	First quartile	3	3
	Third quartile	4	4
	Count unlikely (1-3)	12	11
	Count likely (4-6)	10	7
The number of domestic long holidays (more than 4 days) will grow.	Mean	3.41	3.5
	First quartile	3	3
	Third quartile	4	4
	Count unlikely (1-3)	13	9
	Count likely (4-6)	9	9
The importance of price in determining domestic tourism demand will rise.	Mean	3.96	3.78
	First quartile	3	3
	Third quartile	4	4
	Count unlikely (1-3)	7	7
	Count likely (4-6)	15	11
<b>As a result of population growth and migration ...</b>		<b>Round 1</b>	<b>Round 2</b>
Domestic tourism demand will shift from coastal to non-coastal destinations.	Mean	3.32	3.33
	First quartile	3	3
	Third quartile	4	4
	Count unlikely (1-3)	14	11

	Count likely (4-6)	8	7
Domestic tourism demand will not shift from coastal to non-coastal destinations.	Mean	3.41	3.78
	First quartile	3	3
	Third quartile	4	4
	Count unlikely (1-3)	13	7
	Count likely (4-6)	9	11
<b>As a result of changing family structures ...</b>		<b>Round 1</b>	<b>Round 2</b>
The number of domestic long holidays (more than 4 days) will decline.	Mean	3.05	3.11
	First quartile	3	3
	Third quartile	4	3.75
	Count unlikely (1-3)	14	13
	Count likely (4-6)	7	5
The number of domestic long holidays (more than 4 days) will grow.	Mean	3.77	3.44
	First quartile	3	3
	Third quartile	4	4
	Count unlikely (1-3)	9	9
	Count likely (4-6)	13	9
Domestic demand for child-friendly tourism products will grow.	Mean	3.86	3.72
	First quartile	3	3
	Third quartile	4	4
	Count unlikely (1-3)	9	7
	Count likely (4-6)	13	11
Domestic demand for child-friendly tourism products will decline.	Mean	3.0	3.06
	First quartile	2.25	3
	Third quartile	4	4
	Count unlikely (1-3)	14	12
	Count likely (4-6)	8	6
The importance of price in determining domestic tourism demand will rise.	Mean	4.18	3.72
	First quartile	3.25	3
	Third quartile	5	4
	Count unlikely (1-3)	6	7
	Count likely (4-6)	16	11

Controversy existed regarding the instance of holidays of more than four days in the future. Some respondents thought that the number of domestic holidays of more than four days was likely to decline because people would be working longer hours and retire at a higher age, while others expressed the opinion that the older population was time-rich, thus favouring longer holidays. Changing family structures were another reason considered likely to support both an increase and a decline of such longer holidays. Lastly, while some respondents thought that couples without children would have more time to travel than families, others believed that childless couples were more likely to take frequent short-breaks instead of long holidays. Table 4 summarises the reasons respondents provided for their ratings.

**Table 4**  
**Reasons provided for low consensus statements**

unlikely	likely
<i>As a result of population ageing...</i>	
<i>There will be a shift from domestic to international holidays.</i>	
<ul style="list-style-type: none"> <li>○ Australians continue to have an interest in their own country and an ageing population will favour familiar and known destinations.</li> <li>○ Price, security and health are barriers for international travel, particularly for the older population.</li> </ul>	<ul style="list-style-type: none"> <li>○ The current high outbound preference will continue.</li> <li>○ Younger and wealthier retirees with more time available seek new adventures.</li> <li>○ International destinations are competitive and provide reason for 'bragging'.</li> </ul>
<i>There will be a shift from international to domestic holidays.</i>	
<ul style="list-style-type: none"> <li>○ Older, more educated and more affluent travellers.</li> <li>○ Nostalgia holidays for the older population.</li> <li>○ Continuous interest for the new retirees.</li> </ul>	<ul style="list-style-type: none"> <li>○ Retirees' reluctance to travel long distances</li> <li>○ Reduced disposable income and cost considerations for older population.</li> <li>○ Domestic focus of older population.</li> </ul>
<i>The number of domestic long holidays (more than 4 days) will decline.</i>	
<ul style="list-style-type: none"> <li>○ Older people who have more time are likely to take</li> </ul>	<ul style="list-style-type: none"> <li>○ Short get-aways used as trials for long holidays.</li> </ul>

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fewer but longer holidays. ○ Despite the increase of short-breaks the need and demand for long holidays will remain.	○ General increase in short-breaks fuelled by better accessibility of destinations. ○ Older population cannot afford them. ○ People will work longer hours and retire later.
<i>The number of domestic long holidays (more than 4 days) will grow.</i>	
○ Short break growth as a result of affordability. ○ Longer work life leads to time-poor retirees.	○ The older population is time-rich.
<i>The importance of price in determining domestic tourism demand will rise.</i>	
○ Increase of wealthy population.	○ Increasing importance of value for money. ○ Older population is price-sensitive. ○ Rising fuel costs, interest rates, and cost of living has negative impact on tourism expenditure, especially by older population. ○ Awareness of need for a retirement plan amongst the younger generations.
<b>As a result of population growth and migration...</b>	
<i>Domestic tourism demand will shift from coastal to non-coastal holidays.</i>	
○ Queensland's tourism image does not support it. ○ Love of the beach. ○ Lack of accessibility.	○ Increased demand for new/ unusual products. ○ Growing population will take advantage of ease of access to the beach.
<i>Domestic tourism demand will not shift from coastal to non-coastal holidays.</i>	
○ Population density of coastal regions. ○ Living at the coast, people are more inclined to travel inland. Non-coastal is different from the every-day. ○ Growth of non-coastal infrastructure.	○ Marketing geared towards coastal tourism. ○ Love of the beach. ○ No indication for infrastructure investments in non-coastal areas. ○ Accessibility. ○ Coast suitable to all age groups.
<i>The number of domestic long holidays (more than 4 days) will decline.</i>	
○ The increasing number of couples will find it easier to plan breaks. ○ Couples will contribute to existing decline. ○ More SKINs (Spend Kids' Inheritance Now).	○ With fewer children, the family holiday will decline as a proportion of the total market. ○ Childless couples take short-breaks frequently instead of long holidays.
<i>The number of domestic long holidays (more than 4 days) will grow.</i>	
○ Trend to short breaks, particularly for couples and singles.	○ More time to travel without children at home. ○ Need for long holidays will remain and cannot be substituted with frequent short breaks.
<i>Domestic demand for child-friendly tourism products will grow.</i>	
○ Fewer children in households	○ Those who have children will demand more facilities for them. ○ Time-poor parents are big child-care users and will demand this service when travelling. ○ Divorced/ separated parents will each take the children on holidays.
<i>Domestic demand for child-friendly tourism products will decline.</i>	
○ New generation parents will want freedom on holidays. ○ Increasing population drives demand. ○ Fewer families but higher recognition of child-friendly products.	○ Fewer families with children will demand these products. ○ Smaller number of families. ○ Couples prefer to holidays without other people's children.
<i>The importance of price in determining domestic tourism demand will rise.</i>	
○ Childless couples are less price-sensitive. ○ No children mean more disposable income.	○ Competition of international destinations. ○ Demand for better value for money.

## CONCLUSION

The results obtained from this study confirm the intuitive understanding that the impacts of external change in general, and those of demographic change in particular, cannot be predicted with absolute certainty. However, they also strengthen van der Heijden's (1996) claim that some impacts may be more predictable than others. High consensus amongst respondents regarding some potential impacts of demographic change on domestic tourism demand suggests that these are aspects for which higher certainty exists. Similarly, low consensus amongst respondents implies higher uncertainty regarding other potential impacts of demographic change.



As the results showed, population growth and migration to Queensland are likely to have a growth effect on domestic tourism demand in Tropical North Queensland and Southeast Queensland, but other states may also benefit from this development. For Queensland, the expectation of growing interstate demand caused by an ageing population is also encouraging. However, it may also be possible that pressure on coastal areas will increase as a result of continuing visitation to existing destinations and a tendency to explore new beach holiday destinations. This trend could increase the urgency of considering issues like carrying capacity, and social and environmental sustainability in tourism planning and development. Population ageing is also expected to shorten the average length of holidays by replacing longer holidays with shorter, more frequent breaks. This development would potentially lead to higher demand for transportation to and from destination areas by air, rail and road, which might trigger further concerns for the environment. In addition, given that respondents expressed an expectation for more caravanning holidays by the older population, more drive holidays by younger people, and higher demand for non-coastal destinations, the road system within Queensland and the access roads to the state may require substantial upgrading and expansion to cope with the increased intensity of use. Some thought may also need to be given to the style of holidays which domestic tourists may demand in the future. While there is an expectation that luxury products could be in higher demand because of the ageing population, budget products may also increase in popularity.

For the low consensus statements other considerations need to be made by tourism professionals. The demand for child-friendly tourism products, in particular seems to be uncertain, which can be related back to the projections for the number of children in the population. Should numbers fall, it is more likely that demand for such products will drop accordingly. However if their numbers increase despite representing a decreasing proportion of the population, there may be an actual increase of the demand for child-friendly products. The number of children and the change of family structures in the future seem to be the developments that are most complex to predict. It is difficult to foresee whether the recent increase in the number of births represents stagnation or even reversal of the falling birth rates that have been reported in the past years. They illustrate that it may be very dangerous for any organisation to rely on one single forecast, since the circumstances under which these are made may change.

Furthermore, it is possible that the ratings for those statements that achieved high consensus were based on existing trends that respondents anticipated to continue in the mid-term future. The danger of such extrapolation may lie in unpredictable events that could alter the shape of such trends and their respective effects in the future. When conducting their planning activities, tourism organisations need to be aware of several issues:

- External environments are unlikely to remain the same and a certain element of change needs to be incorporated in the planning process.
- Changes that have been forecast may be less certain than they appear.
- Some future developments can be predicted with greater certainty than others.

This does not mean that tourism organisations should stop planning for the future. However, they need to equip themselves with planning mechanisms that are flexible enough to accommodate variations in the trends and expectations on which their strategies are built. Scenario planning has been identified in the strategic management literature as such a tool and the results of this Delphi study will serve as the basis for the creation of scenarios for tourism demand in Queensland.

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