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Tracking the concept of sustainability in Australian tourism policy and planning documents

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In the current climate of intense turbulence, tourism must transform to a more sustainable development platform. Yet it remains unclear how the concept of sustainability is embedded at different levels of government policy and planning, and how this has evolved over time. This paper identifies the concept of sustainability as it is articulated in 339 Australian tourism strategic planning and policy documents published between 2000 and 2011. The paper examines the extent to which the concept of sustainable tourism is evident in the discourse of Australian tourism strategic planning documents at the national, state, regional and local levels, as well as the balance of the discourse in relation to sustainability objectives. The results show that the frequency of occurrence of sustainability as a concept has slightly increased in strategies over the past decade. At the same time, there has been a shift in the conceptualisation of sustainability, with thinking evolving from nature-based, social and triple bottom line concepts toward a focus on climate change, responsibility, adaptation and transformation.

Keywords: sustainability; tourism; planning; policy; discourse, Australia

Introduction

Rapid and unexpected change has become a norm of modern society. The world has become an increasingly volatile place with terrorism, health epidemics, economic crises, changing consumption patterns, increasing fuel prices, food and water shortages and global warming confronting many nations (Sterman, 2012). The combined impact of such factors has reignited the focus on sustainable development as a continuing challenge for business and governments generally, and for tourism specifically (Scott, 2011; Song, Dwyer, Li, & Cao, 2012). Arguably, the tourism industry must be prepared to address current and forthcoming challenges to maintain the viability of the sector and the resources upon which it depends; and thus there is a need for proactive decision-making and strategic planning by governments, businesses and other stakeholders in order to maximise opportunities, minimise adverse impacts and maintain competitive advantages.

While sustainable tourism has been a major focus of research emanating from academe for decades, its use as a policy instrument by government, let alone embracement by industry and consumers, has been much less evident (Bramwell & Lane, 2008; Kogut & Macpherson, 2011; Murphy & Price, 2005; Ruhanen, 2013). Indeed, Hall (2011) argues that while sustainable tourism has been recognised as an idealist concept by industry, government, academics and policy actors, it is less clear whether sustainable tourism

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has been adopted and applied in policy and planning or by the industry. Many reasons have been suggested for this. For instance, the practical approaches to sustainable tourism rarely coincide with the true values of sustainability (Collins, 1999). Certainly it has been suggested that the “theories” of sustainable tourism development are often disconnected from the real world of tourism governance and industry (Ruhanen, 2008; Sharpley, 2009). Hall (2011) further points out that while sustainable tourism rhetoric is prevalent, balanced sustainable development continues to fail due to key tourism policy actors refusing to acknowledge the policy failure. He postulates that a paradigmatic shift to sustainable tourism policy is unlikely to occur due to the dominance of the economic growth paradigm, a view that has been maintained by others (Ruhanen, 2013; Whitford, Bell, & Watkins, 2001). Similarly, Sharpley (2000) argues that the principles of sustainable tourism are generally accepted, but the role of tourism generally remains justified by economic development objectives. More recently, Sharpley (2009) has asserted that the sustainable tourism discourse has been going around in circles without a major breakthrough and little application in industry, suggesting a need to go beyond sustainable tourism in order to progress tourism development.

Yet it is apparent that the increasing focus on the environment, climate change and sustainable development has, by necessity, led to much broader planning perspectives for tourism globally, overcoming previous fixations with economic and marketing growth strategies (Burns & Novelli, 2007; Gössling, Hall, & Weaver, 2009; Kozak & Baloglu, 2010). Such a shift toward a sustainable development platform represents a notable step forward for the tourism industry.

In that context, the purpose of this paper is to track how the concept of sustainability has infiltrated and evolved in Australian tourism policy and planning. This is achieved via a content analysis of 339 Australian tourism strategic planning and policy documents produced at the national, state, regional and local policy levels between 2000 and 2011. Australia is a useful context within which to examine these issues, as the tourism sector in the country has relied heavily on government intervention. In this paper, policies at the various levels of government and between states and territories are examined and contrasted to identify shifts with a particular emphasis on the various aspects of the triple bottom line. The paper concludes by providing insights into the possible paths sustainable tourism research and policy-making may take over the coming years.

Literature review

The policy applications of sustainable tourism

The sustainability movement has generally resulted in increased recognition by the public and private sectors that there is a need for triple bottom line measurement and corporate social responsibility (Sharpley, 2009). Clarke (1997) identified that in the early 1990s some large tourism organisations had adopted certain concepts of sustainable tourism, with British Airways publishing an environmental report in 1991, the “Green Globe” programme commencing in 1992, and with the World Travel and Tourism Environment Research Centre being established in the same year. In 1993 Bramwell and Lane also identified that some national, regional and local governments, tourism organisations and businesses were increasingly using sustainability concepts in their policy statements and initiatives. More recently, sustainability has reputedly become a key driver of the social and political agendas in many countries, including Australia (Berke, 2002; Jayawardena, 2003; Ruhanen, 2004).

In the academic literature the term “sustainable development” has been extensively debated and criticised by some as being ambiguous and even an oxymoron (Butler, 1991; Cater, 1993; Hopwood, Mellor, & O’Brien, 2005; Hunter, 1997; Page & Dowling, 2002). The concept of sustainable tourism emerged from this broader debate on sustainable development (Redclift, 2005). As sustainable tourism is a multidisciplinary field of study, numerous perspectives have been proposed, which has led to a lack of consensus surrounding the definition, the theoretical underpinnings and how to implement the concept (Sharpley, 2009). While this debate has arguably advanced theoretical understanding of the subject of sustainable tourism, it has rarely been perceived as relevant to practitioners (Jenkins, 1999). It has been argued that there are gaps between the idealism of sustainable tourism as it is conceptualised by academics and the reality of adopting it as a tourism development paradigm of practical use for the tourism industry (Sharpley, 2009).

Indeed, the implementation of sustainability has generally been problematic (Butler, 1998), with some suggesting that there is little evidence that the principles of sustainable tourism have been adopted within the tourism industry (Fredline, Jago, & Day, 2006). For example, while some organisations have adopted “green” values for economic returns, it has been difficult to determine those that are truly “green” (Boers & Bosch, 1994; Harrison, 1996). One key difficulty in adopting sustainable tourism is identifying the most appropriate path for sustainable tourism development (Hunter, 1997). As Hunter (1997) points out, strong local-level sustainable tourism planning and development is required. Yet it has been suggested that sustainable tourism has had limited practical application at the local level (Butler, 1999; Choi & Sirakaya, 2006). In contrast, Murphy and Price (2005) indicate that it can be effective at the local level, but that sustainability is unlikely to truly exist at a national or international level. However, sustainability has been complicated to adopt at the local level when environmental conservation has not aligned with the needs and desires of the local community (Stocking & Perkin, 1992).

The integration of sustainability and sustainable tourism principles into government and industry policy and planning is particularly important. In terms of policy and planning applications, the Australian Government, at a national and state level, has continued to be criticised for its marketing and economic focus when it comes to tourism policy, which has been at the expense of social and environmental considerations (Fredline et al., 2006; Hall, 1994; Ruhanen, 2004, 2008). Yet others have suggested that the neoliberal policies of Australian governments have begun to be transcended by alternative development paradigms (Whitford, 2009; Whitford et al., 2001). Hunter (1997) argued that sustainable tourism can serve as an adaptive paradigm that can effectively address a diverse range of situations. As it is difficult to balance economic returns with preservation of the environment and society (Prosser, 1994), sustainable tourism requires holistic, integrative and long-range planning (Foley, Lennon, & Maxwell, 1997; Gunn & Var, 2002).

The use of policy documents in planning for sustainability

Policies, including sustainability and sustainable tourism policies, are ideological innovations that can have considerable impact on government policy, the industry and the broader community (Kogut & Macpherson, 2011). Strategic planning documents convey and drive government policy and influence industry direction and development (Connell, Page & Bentley, 2009). Consequently, strategic planning documents can provide a window for viewing how the concept of sustainability is embedded and has evolved in tourism planning. A number of researchers have explored policy and strategic planning

documents as a means of understanding how the sustainable tourism concept has been applied in various contexts (Connell et al., 2009; Ruhanen, 2008; Ruhanen, McLennan, & Moyle, 2013; Torres-Delgado & Palomegue, 2012; Whitford & Ruhanen, 2010). Yet it has been argued that further research is needed to examine changes and evolution in sustainable tourism policies over time (Farsari, Butler, & Szivas, 2011) and also at different levels of policy and planning (Torres-Delgado & Palomegue, 2012).

Previous studies have investigated the concept of sustainability in tourism public sector strategic planning and policy documents. Much of this research suggests that the public and private sectors of the tourism industry have been attempting to achieve sustainable tourism development via government strategies (Murphy & Price, 2005). For example, Torres-Delgado and Palomegue (2012) investigated 55 international, European and Spanish tourism planning and policy documents, identifying that there had been the appearance of new, primarily environmental and social, elements in the documents that has “forced a rethink of tourist planning and management” (Torres-Delgado & Palomegue, 2012, p. 9). Similarly, Edwards, McLaughlin, and Ham (2003) investigated government tourism agencies’ ecotourism policy documents in the Americas, finding that most of the government tourism agencies were aware of, and engaging in, ecotourism policy. Yet there was little consistency in ecotourism definitions between the agencies and few were developing, adopting and implementing ecotourism objectives, plans or programmes.

Yet others have argued that there is a continued focus on economic development at the expense of social and environmental values. Previous studies argue that tourism strategic planning and policy documents tend to take a marketing-centric approach, with many strategies failing to incorporate a sustainable perspective (Baggio & Marzano, 2007; Faulkner, 2003; Ruhanen, 2004). Baggio and Marzano (2007) investigated Tourism Queensland Destination Management Plans (DMPs) in Australia, finding that the DMPs primarily related to the social impacts of tourism and to the marketing and promotion of tourism. Importantly, they determined that sustainability was not a core concept in Tourism Queensland’s DMPs. Similarly, Ruhanen (2004) investigated Australian national tourism strategic planning documents, determining that, while sustainable development has been a topical issue in tourism for several decades and it is regularly identified as underpinning the industry’s strategies, it was referred to in very few of the analysed documents in comparison to economic concepts such as marketing. Whitford and Ruhanen (2010) concluded that sustainable tourism development is not yet widespread at the Australian federal government level, which concurs with Fredline et al. (2006, p. 27) who suggested that the Australian tourism industry has continued to “skirt around the issue of sustainability”.

In Turkey, Yüksel, Yüksel and Culha (2012) suggested that tourism ministers remain focused on economic growth and that this has flowed through into the national tourism strategic planning documents. Similarly, in Greece Farsari et al. (2011) found that tourism policy-makers focused on economic issues with only an ephemeral mention of environmental and social considerations. Moreover, as Hall (2011) has suggested, balanced sustainable development has seemingly been failing, with a continued preoccupation with economic development. Others also argue that tourism policies based on sustainable tourism appear to be unbalanced in their triple bottom line focus (Buckley, 2012; Torres-Delgado & Palomegue, 2012). To meet the challenge of creating balance between economic, social and environmental values there is a need to first assess whether there is imbalance within tourism strategic planning and policy documents in terms of their economic, social and environmental focus.

Using Australian strategic policy and planning documents this paper examines the evolution of the concept of sustainability in government policy and planning, with a focus on comparing and contrasting the various strategic levels and states/territories of Australia. Achieving this aim will enhance our conceptual understanding of the discourse of sustainable tourism within a policy and planning context, including the triple bottom line focus. Insights into the Australian context can also help to highlight issues and implications for other countries, and they may also assist in determining a future path for sustainability in the tourism sector.

Method

To address the aims of the study a comprehensive and extensive online search was undertaken for publicly available Australian national, state, regional and local tourism strategic planning documents, released between 2000 and 2011. The documents were then analysed using Leximancer v.3, which is a powerful content analysis software program that has previously been employed in tourism research (Kattiyapornpong & Nel, 2009; Marzano & Scott, 2006; Pitt, Campbell, Berthon, Nel, & Loria, 2008; Scott & Smith, 2005). The policy period was restricted to 2000 to 2011 as it was a requirement of the Leximancer analysis that the documents were electronic, and very few strategies were found to be available online and/or electronically prior to 2000. Key search words included “tourism” with a combination of “strategy” or “plan” and, to ensure comprehensive coverage, a sampling framework of all the state, regional and local tourism areas in Australia was developed. The names of the state, region or local areas were then used as key search words in combination with those listed above, with the specific intention to target tourism strategies and plans from particular areas and levels of planning.

Tourism strategies and plans produced by tourism agencies (e.g. Brisbane Marketing, Sapphire Coast Tourism), government (e.g. Tourism Australia, Tourism Queensland) and industry bodies (e.g. Tourism and Transport Forum, Backpacker Operators Association of New South Wales) were identified, downloaded and catalogued in a database for analysis. The scope included peak industry bodies, as they are highly influential in the tourism policy space in the Australian context (Airey & Ruhanen, 2013). The documents were filed in separate folders by year, level of government and state/territory, and then they were manually scrutinised to ensure that they were in-scope using the criterion that the strategy or plan was produced by a tourism government agency or relevant association. Further, the document was required to have either the term “tourism” in the title, or to have the term “tourism” as a major component of the strategy or plan (defined for this study as more than 20 occurrences of the word within the text). If the strategy or plan did not satisfy these criteria it was deleted from the database.

This process resulted in a total of 339 tourism strategies and plans being included in the analysis. The policy periods ranged from 2–25 years, with the median policy period being five years and the mean policy period being 5.8 years. The documents mainly consisted of regional-level strategies (37%), followed by state- (27%), local- (24%) and national- (12%) level strategies. The state of Victoria had the largest number of strategic planning documents (24%), followed by Queensland (17%), New South Wales, (11%), Western Australia (10%), South Australia (9%), Tasmania, (8%), the Northern Territory (6%) and the Australian Capital Territory (3%). The strategies were generally produced by the state tourism authorities, namely Tourism Victoria (13%), Tourism Queensland (7%), Tourism Western Australia (6%), Tourism New South Wales (5%), South

Australian Tourism Commission (3%) and Tourism Northern Territory (3%), as well as the federal Department of Resources, Energy and Tourism (3%). The remaining 58% of the strategies were produced by a variety of organisations that had produced fewer than 10 tourism strategies each (less than 3% of all strategies) during the period.

The documents were coded and analysed using content analysis, thus following many previous studies relating to tourism planning (Glesne, 1999; Hall & Valentin, 2005; Malloy & Fennell, 1998; Whitford & Ruhanen, 2010). However, due to the size of the database, the 339 strategic planning documents were loaded into Leximancer v.3 for analysis, which is a data mining tool that allows for the automatic and rapid coding of textual documents (Scott & Smith, 2005). Without the aid of software, the analysis of large text databases is highly labour intensive and open to extreme variation in coding (Popping, 2000). Using software such as Leximancer allows for increased reliability and validity as it can reduce bias in the content analysis process (Alexa & Zuell, 2000).

Leximancer develops concepts by using seed words, which are either derived from the document or are user-defined (i.e. defined by the researcher to be relevant). After this process occurs Leximancer counts words based on how frequently they occur in sentences containing the concept. Leximancer will then create a “concept” once a certain number of words are grouped together. The frequency of co-occurrence between concepts is used to generate clusters on the concept map (Leximancer, 2011). In this study, variants of the word (such as environment/environmental) were merged together to form a single concept and irrelevant words such as the/and/or were deleted. Leximancer then tabulated the frequency of occurrence of each concept. The output of the Leximancer analysis includes conceptual maps that visually present the concepts and themes and that demonstrate the relationships between various concepts and themes. The maps cluster concepts according to their contextual similarity, and also display themes, which are groupings of highly connected concepts that are represented by circles. The strength of the connection (or co-occurrence) between concepts determines their connectivity value, which determines if they should be included in a theme and represents the relative importance of the themes in the planning documents. The relative importance of the themes is captured along three key dimensions: how often the theme emerges, how well the theme groups together and how well the theme connects to other themes.

One advantage of using Leximancer is that themes are allowed to emerge from the data, rather than them potentially being imposed by the researcher (Miller & Riechert, 1994). While concepts and themes are *emergent*, Leximancer also allows for directed or focused searches of the documents using what are referred to as *user-defined terms*, these being themes that the researcher believes are relevant and should appear within the text and key concepts. If specified, Leximancer will ensure that these words are counted and displayed on the concept map, thus revealing their links to other emergent concepts and themes (Baggio & Marzano, 2007).

All concepts, including those deemed relevant to sustainable tourism, as well as other broader concepts, were identified by Leximancer for the analysis. In addition, particular concepts of interest were isolated by specifying a series of user-defined terms derived from previous research using keywords on sustainability (Tompkins et al., 2010). These included: Adapt/adaptation/adaption/adaptive; capacity; change/changes; climate/carbon; conservation; economy/economic; ecotourism/ecotourism/ecosystem/ecology/ecological; environment/environmental/environmentally; impact/impacts; innovation/innovative; natural/nature/nature-based; responsibility/responsible; social; sustainability/sustainable; transform/transformation/transformational; and triple bottom line.

In the results section these are referred to as user-defined concepts.

Several limitations are associated with the method employed in this research. The study assessed policies and plans across a 12-year span; arguably a relatively short duration in policy and planning contexts. On the other hand, political cycles are such that, particularly at the national and state levels, a large number of documents were still identified. Further, with the first Australian national-level tourism strategy only being released in 1992 and with many of the strategies at this time only existing in hardcopy, this delimitation is not inappropriate (Ruhanen et al., 2013). To reduce variability by years and to ensure that the policy trend was clear, the documents were grouped into two time periods for time series analysis; 2000–2005 and 2006–2011.

While every attempt was made to ensure a comprehensive coverage of Australia's national-, state-, regional- and local-level tourism strategies and plans, it is acknowledged that the sample of documents may not be exhaustive and may not capture internal or planning documents that are not publicly available. Furthermore, there was no attempt to weight the documents or organisation by relative importance, as no population was available; instead all publicly available Australian strategic planning documents were sought for inclusion in the sample set. Leaving the data unweighted allows the organisations most actively involved in tourism planning to emerge from the analysis, rather than being identified by the researchers. Similarly, there was no attempt to capture qualitative data, such as the degree of emphasis given to particular concepts within individual documents due to their positioning or other nuances within the documents. Without conducting a survey of the actual users of these strategies, the analysis presented in this paper may not accurately capture how policy-making and planning decisions were or are influenced by these documents.

Results

The evolution of the sustainability paradigm within the strategies

The aim of this study was to investigate how the concept of sustainability has evolved in Australian tourism strategic planning documents between 2000 and 2011. Sustainability can be viewed in the strategies as an individual concept (that is, the term “sustainable tourism” is cited within the strategies), or it can be viewed as an overarching theme composed of various elements, such as the economy, society and environment, concepts that connect under the umbrella of sustainable tourism. The results indicate that the frequency of the use of sustainability as a unique term (that is, not grouped into themes) remained relatively unchanged between the 2000–2005 and the 2006–2011 strategies, with the focus on the concept remaining at about 2% of all concepts identified in the strategies. However, between 2000 and 2005, sustainability as an overarching theme (which includes the broader elements of sustainability in addition to the word “sustainability”) increased in frequency from 16% of all concepts used in the documents to 17% of all concepts used.

While the use of the term sustainability did not increase between 2000–2005 and 2006–2011, there was a shift within the strategies in terms of the concepts of sustainability. The connectivity score in Table 1 indicates the relative importance of each theme within the documents, which as identified above is based on the notion of how often the theme emerges, how well the theme groups together and how well the theme connects to other themes.

Within just the sustainability concepts, between 2000–2005 and 2006–2011, the analysis of the conceptual maps reveals that the connectivity of the theme *environment* fell

Table 1. Connectivity of the top 10 user-defined^a sustainability terms.

2000–2005 Australian strategies/plans		2006–2011 Australian strategies/plans	
User-defined Theme	Connectivity ^b	User-defined theme	Connectivity
Environmental	100%	Climate	100%
Impact	53%	Environmental	64%
Social	46%	Economic	54%
Conservation	34%	Natural	28%
Nature	15%	Responsible	10%
Capacity	9%	Nature	6%
Triple bottom line	9%	Adaption	5%
Changes	7%	Capacity	4%
Economy	7%	Innovation	2%
Innovative	4%	Transformation	1%

(a) A user-defined theme is one specified in advance by the researcher, based on previous literature. In this study, there were 50 user-defined themes.

(b) The “connectivity” score indicates the relative importance of the themes in the planning documents. The relative importance of the themes is captured along three key dimensions including how often the theme emerges, how well the theme groups together and how well the theme connects to other themes.

from 100% in the 2000–2005 strategies to 64% in the 2006–2011 strategies, while the theme *climate* emerged to become the most connected concept over the period (2000–2011). This indicates that the *climate* concept has increased in importance when compared to other concepts, such as the *environment* concept.

A further analysis of the 15 most frequently occurring user-defined concepts (concepts identified by the researcher) in the Australian tourism strategic planning documents suggests that the industry has seen a shift away from the concepts of impact, social, conservation, triple bottom line and change, to a focus on climate, natural, responsible, adaptation and transformation. Themes that did not change in prominence over this time were environmental, nature, capacity, innovation and economy (Figure 1).

Climate change first emerged in the strategies in 2002 in Victoria’s Tourism Industry Strategic Plan 2002–2006, which noted that:

Global warming is resulting in climate change, particularly in the snowfields, coastal areas and semiarid zone . . . Global climate changes could also affect snowfalls in the long term. (Tourism Victoria, 2002, p. 8, 98)

Climate change increased from representing 1% of (the user-defined) concepts of sustainability appearing in the 2000–2005 documents, to 4% of all the concepts of sustainability appearing in the 2006–2011 documents. The sustainability concepts that became more prominent were *carbon*, *adaptation*, *change*, *climate*, *transformation* and *responsibility*, while concepts that have declined in the frequency of occurrence include *nature*, *social* and *triple bottom line*.

In terms of the focus of the *triple bottom line* concepts across the decade, there was very little change between 2000–2005 and 2006–2011. In 2000–2005, the mix of appearance of these concepts was 38% economic, 34% social and 28% environment; while in 2006–2011, the mix was 39% economic, 31% social and 30% environment. So, overall it does appear as if the balance is still firmly on the economic aspects of development, with the environment increasing slightly in focus and the social aspects falling slightly in the frequency of occurrence.

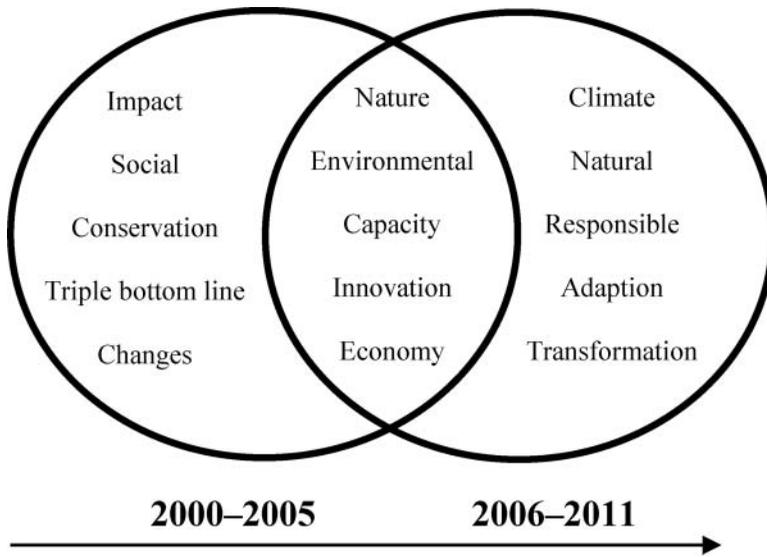


Figure 1. Top 15 user-defined^a key themes in Australian tourism strategic planning documents 2000–2005 and 2006–2011. (a) A user-defined theme is one specified in advance by the researcher, based on previous literature. In this study, there were 50 user-defined themes.

The focus of sustainability by strategic level

This paper also sought to investigate whether sustainable tourism is embedded in the Australian tourism strategic planning documents at all strategic levels and whether there were differences between the different strategic levels in terms of their focus on sustainability. The sustainability theme represented 19% of the concepts that occurred in the local-level strategies and plans, while it constituted 15% of the regional-level, 18% of the state- and 15% of the national-level strategic planning documents. *Sustainability* as a unique concept (just the keyword) appeared more frequently in the state-level strategies (2.7% of all concepts), followed by the regional- (1.8%), local- (1.4%) and national-level (0.8%) strategies. The most frequently used concepts at the local level were *community* and *economic*. At the regional level the most used concepts were *communities* and *natural*. The state level tended to focus on *sustainable* and *natural*, while the national level was focused on *change* and *economic*.

An assessment at each strategic level was undertaken to investigate if there were differences in the balance of the triple bottom line concepts. It was found that at the local and regional levels the triple bottom line focus has been on *society* and *community*, as well as the *economy* (see Figure 2). At the state level the triple bottom line focus is on the *economy* and the *environment*, while at the national level the triple bottom line focus is overwhelmingly on the *economy* (also see Figure 2).

The focus of sustainability by the Australian state or territory

A final component of this research was to investigate whether there were differences between the states and territories in terms of their focus on sustainability, as evidenced by the use of sustainable tourism concepts in their strategic planning documents. To this

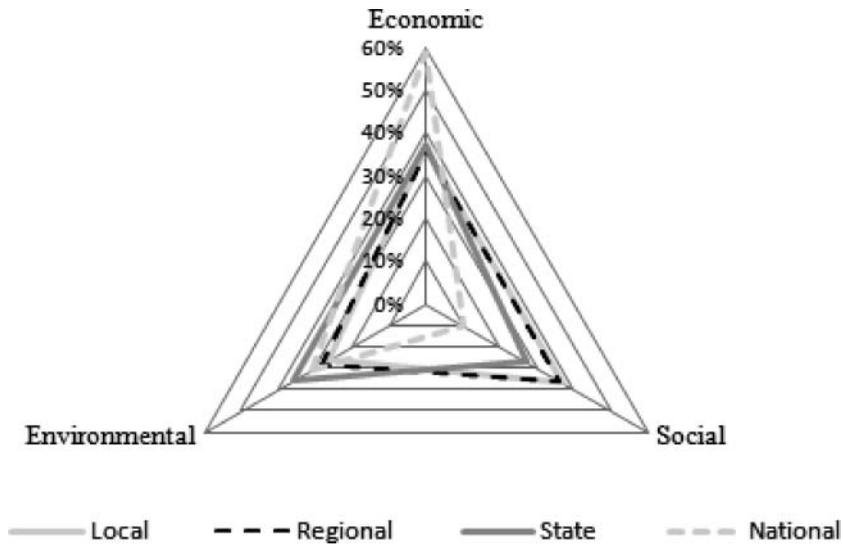


Figure 2. Radar chart of the triple bottom line focus across the strategic levels of the Australian government.

end, all local-, regional- and state-level strategic planning documents were analysed based on the state/territory in which they were produced.

A sustainability theme was evident in all the states' and territories' strategic planning documents, although the emphasis placed on sustainability relative to non-sustainability concepts varied (see Table 2). Notably, Queensland was found to have the greatest focus on sustainability, with Western Australia having the least. The most frequently used sustainability concept was *community* in many of the states; however, the concept of *nature* dominated in the Australian Capital Territory and the Northern Territory documents. In relation to the triple bottom line, the focus of Queensland and Victoria was on the *economy*, while New South Wales and Tasmania were focused on *society*. Notably, four states and territories were focused on the *environment*: The Australian Capital Territory, South Australia, Northern Territory and Western Australia.

A triple bottom line "balance rating" was calculated based on the variance between the highest and the lowest triple bottom line focus. Based on the variation, the ratings were set as follows: 0–7% variance "balanced", 8–14% variance "somewhat balanced", 15–29% variance "somewhat unbalanced", 30% or more variance "unbalanced". For example, Queensland's strategies were focused on economic concepts (40%), followed by social (33%) and environmental (27%) concepts, with the balance rating being calculated by subtracting 27% from 40%, resulting in a score of 13% and a rating of "somewhat balanced". The *triple bottom line* balance rating revealed that South Australia was the only state to have a balanced triple bottom line focus. Queensland and the Northern Territory were found to have a somewhat balanced focus. Western Australia and Victoria had a somewhat unbalanced focus, while the Australian Capital Territory, New South Wales and Tasmania had an unbalanced focus, favouring the environment and society, respectively. This suggests that the tourism industry, with the exception of Queensland and Victoria, has moved away from an economic focus and only Victoria has a somewhat unbalanced focus on the triple bottom line in favour of the economy.

Table 2. Sustainability across Australian states.

	Proportion of sustainability theme in total	Most frequently used sustainability concept	Relative focus on economic/ environment/ society ^a	Triple bottom line balance rating ^b
Queensland	21%	Community	Economic (40%)	Somewhat balanced
Australian Capital Territory	18%	Nature	Environmental (57%)	Unbalanced
South Australia	16%	Community	Environmental (37%)	Balanced
New South Wales	15%	Community	Social (55%)	Unbalanced
Victoria	15%	Community	Economic (39%)	Somewhat unbalanced
Tasmania	15%	Community	Social (43%)	Unbalanced
Northern Territory	14%	Nature	Environmental (41%)	Somewhat balanced
Western Australia	10%	Community	Environmental (43%)	Somewhat unbalanced

(a) Percentages refer to how often the sustainability theme was cited in relation to the other themes found in the strategic planning documents.

(b) Balance rating based on variance between the highest and the lowest triple bottom line focus. The rating is as follows: 0–7% variance “balanced”, 8–14% variance “somewhat balanced”, 15–29% variance “somewhat unbalanced”, 30% or more variance “unbalanced”.

Finally, six of the sustainability concepts emerged as representing over 10% of the sustainability theme in the strategic planning documents of at least one of the states and territories. *Society* represented 11% of the sustainability theme in New South Wales. *Sustainability* as a unique concept was evident in Queensland, South Australian and Victorian documents, where it represented 16%, 16% and 12% of the sustainability theme, respectively. The sustainability focus in New South Wales, Tasmania, Western Australia and Victoria was dominated by the *community* concept, where it represented 19%, 14%, 13% and 10% of the sustainability theme, respectively. The *economic* concept was a focus of the Victorian, Queensland, New South Wales and South Australian sustainability discussions where it represented 16%, 14%, 13% and 11%, respectively. *Nature* represented a sizeable component of the sustainability discussions in all states and territories except Queensland. Last, the *environment* represented in excess of 10% of the sustainability discourse in all states and territories.

Conclusions, implications and future research

Sustainable tourism has been identified as underpinning tourism planning and policy documents (Bramwell & Lane, 2008; Ruhanen, 2008, 2012). All the same it still remains unclear whether sustainability and sustainable tourism as concepts have influenced the tourism public and private sectors (Bramwell & Lane, 2012). This research suggests that sustainability as a broad concept is discussed and the discourse has slightly increased in Australian tourism strategies. However, over the past decade there has been a noteworthy shift in the concepts of sustainability, with discourse evolving from nature, social and triple bottom line concepts, toward a focus on climate, responsibility, adaption and transformation.

Regardless, sustainability as a unique term represented only 2% of all the concepts used in the strategies. When sustainability was viewed as a theme (or a cluster of concepts) it represented 17% of the concepts occurring in the strategies. While sustainability concepts are embedded in policy documents at all strategic levels, this has been most noticeable at the local level. Indeed, this research found that policies at the national level made the least use of sustainability concepts. While Murphy and Price (2005) argue that local-level policies are more effective than national- or international-level policies, this research suggests there is still merit in giving sustainability a greater focus within Australian tourism strategies, particularly at the national level.

In terms of sustainability balance, the social aspects of sustainability are more prominent at the local level, most likely due to local governments' community-centred mandate. In contrast, economic aspects are more prominent in national-level policy, with some evidence of climate change and impacts of tourism. However, it is at the regional level where responsibility and transformation are most evident in policy. This analysis has confirmed that sustainability concepts are embedded in tourism policy across Australia, but particularly in Queensland where the concept represents a greater share of the strategic discussion in the analysed documents. Western Australia has the least focus on sustainability in its policy documents, while South Australia has the most balanced triple bottom line. Only two states, Queensland and Victoria, still have a focus on economic discourse. However, of these only Victoria has a somewhat *unbalanced* approach in favour of the economy over environmental and social issues. These findings concur with Torres-Delgado and Palomegue (2012) and Edwards et al. (2003) who suggest that tourism policy and planning is becoming increasingly balanced or more focused on environmental concerns, as opposed to economic considerations.

It must be acknowledged that the findings of this research are particular to a specific context and governance regime, which is not necessarily transferable to other developed world regimes. Thus, there are several avenues for future studies that have emerged from this research, such as expanding the current study to other countries, particularly those with different political ideologies. For instance, others have noted a need to better understand the differences between Western and Eastern sustainable tourism thinking and paradigms in order to understand how sustainable development can be implemented successfully (Sofield & Li, 2011). Future research could also investigate whether the public sector policies relating to sustainable tourism are being adopted and implemented by the private sector. Moreover, there is scope to expand the present study to investigate the evolution of sustainability in all Australian policy and planning documents by expanding beyond the current focus on tourism policy and planning documents. Thus, the methodology used in this paper could be used to assess industry or business strategic planning documents. There is also an opportunity to investigate legislation rather than policy documents. As Hall (1997) notes, as long as planning remains confined to policy documents, rather than in legislation, the principles of sustainable tourism development will be difficult to implement.

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