

TOURISM CENTRAL AUSTRALIA
**STRATEGIC
PLAN**
2018 – 2023



**TOURISM
CENTRAL AUSTRALIA**

Your Tourism Voice

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Introduction from the Chair



I am pleased to present the Tourism Central Australia Strategic Plan for 2018 – 2023. This is a working document outlining the initiatives and projects to be undertaken over the next five years. The Plan not only provides a platform for achieving a sustainable future for the Association but provides a viable strategic direction.

Significantly Tourism Central Australia has signed off on a 5-year funding agreement with the NT Government and the Department of Tourism & Culture. This historic agreement provides stability for the organisation and allows us to look at a longer term strategic position and picture. I wish to thank the Minister for her support and confidence in Tourism Central Australia.

This Strategic Plan consolidates many sources of information. The Tourism NT 2020 strategy, input from NT Government agencies, TCA Board members, staff and our members have all been canvassed to create this strategy.

We have achieved so much as an organisation in the last 12 months;

- Finalisation of our new Membership structure, allowing a streamlined membership structure and flexibility for our members
- Winning the NT Tourism Brolga Award for Visitor Information services for the 3rd year in a row and going on to win a Silver at the Qantas Australian Tourism Awards

- Winning an award for SKAL International Most Sustainable Tourism Destination and the #RedCentreNT being announced as one of the Top 100 Global Green Destinations
- TCA's advocacy platform has seen us gain traction in many areas of NT Government Policy
- Our increase in revenue from Grants and alternative sources, allowing TCA to work harder for our members
- A strong strategic focus on revenue growth
- Our expansion into Outback South Australia has future potential

As we move forward as an organisation and Industry we have highlighted our key areas of strategic focus.

- Continuing to support the National Aboriginal Art Gallery and National Indigenous Cultural Centre projects
- Looking at some niche trail opportunities, expanding on our successful Art Trails app
- Focus on the development of the East Macs/Plenty region masterplan development
- Looking at opportunities to expand on our Visitor Information services within the Red Centre region
- Looking at opportunities for our organisation to increase our revenue and income streams aiming for financial stability
- Continuing to be a strong voice and lobby on behalf of our members on a number of key projects
- Continuing to operate our award winning Alice Springs Visitor Information Centre and aiming for best practice
- Continuing to market the Red Centre and in particular our Outback Adventure Experiences

Tourism is in an exciting phase with record NT Government investment into the industry and Tourism Central Australia looks forward to the growth of our visitor economy.

Cheers

Ms. Dale McIver
Chairperson



Our Operating Context

Our Vision

Organisation Vision

Tourism Central Australia is the leading Regional Tourism Organisation in Australia. Everyone in the #RedCentreNT visitor economy engages with us for guidance and support, and we are globally connected.

Destination Vision

The #RedCentreNT is the pilgrimage that everyone makes. It remains an outback destination, famous for its authenticity and adventurous experiences.

Our Mission

Tourism Central Australia is a business led organisation, committed to sustainably growing the visitor economy in the #RedCentreNT. We are the leading provider of tourism information and marketing services in the region, continuously improving our services.

Our Objectives

The objectives and purpose of the Association as stated in our Constitution are as follows

- **To provide leadership and to work in partnership with the tourism industry in Central Australia to assist the development of tourism product, marketing and infrastructure**
- **To promote the Central Australia Region to increase visitor numbers, yield and dispersal**
- **To work with industry stakeholders to facilitate quality tourism experiences and products are presented to visitors to the Region**
- **To represent and advocate on behalf of members in relation to tourism issues, and to facilitate within the tourism industry collaboration and professionalism**

Objectives Summary:

1. To provide leadership of and work with businesses in the visitor economy in the #RedCentreNT to develop experiences, products and infrastructure that appeal to travellers.
2. To market the #RedCentreNT to increase visitation, expenditure, regional dispersal and length of stay.
3. To advocate on behalf of businesses in the visitor economy for policies and programs that increase visitation to the #RedCentreNT, and to provide opportunities for businesses to collaborate and increase their capabilities.

Key Challenges

BACKGROUND

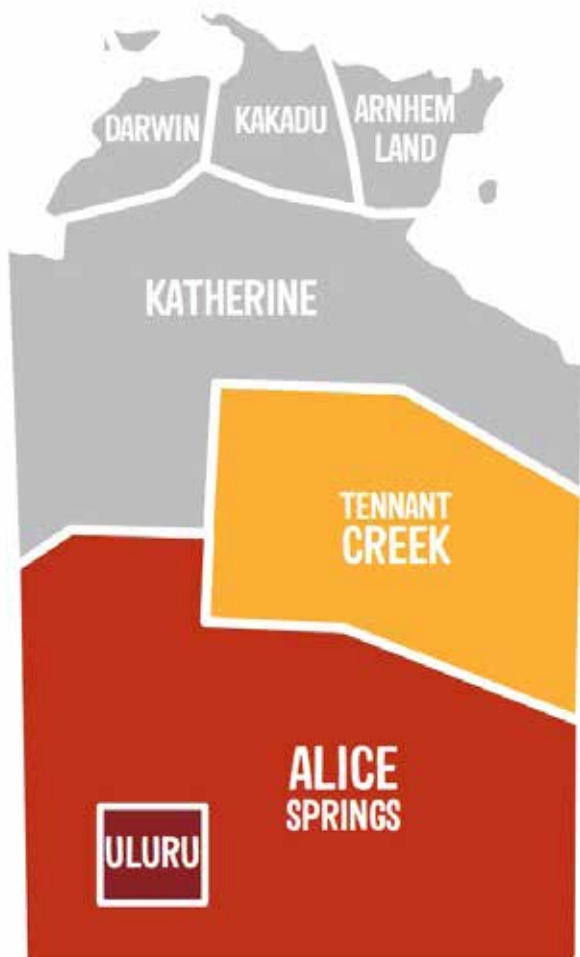
The #RedCentreNT region is the heart, soul and centre of Australia. It is a loose region of outback areas, from northern outback South Australia in the south to Newcastle Waters in the north, and from the edge of the Gibson Desert near the WA border to the Queensland border including the Simpson Desert, encompassing Alice Springs, Yulara, Watarrka and Tennant Creek amongst other regional towns (refer Maps 1 & 2). We are also working more closely with tourism businesses in outback SA than ever before.

Tourism Central Australia is one of two Regional Tourism Organisations in the Northern Territory, the other being Tourism Top End (servicing the region north of Newcastle Waters). Tourism Central Australia supports a wide variety of stakeholders including individuals, businesses and organisations to help grow the visitor economy in the #RedCentreNT. It also manages the Alice Springs Visitor Information Centre.

Tourism Central Australia operates within a highly competitive, yet growth focussed, tourism environment. Tourism in the NT contributes \$2.259b to the Northern Territory, with \$851m of this being in the #RedCentreNT.^[1]

Our competitive strengths are based upon the natural outback landscape, our cultural heritage and unique events. The competitive position of the Northern Territory and the #RedCentreNT is affected by difficulty and cost of access and the affordability of competing destinations.

^[1] Cited from Tourism NT, Year Ending December 2017 Visitor Data, available at http://www.tourismnt.com.au/~/_media/files/corporate/research/quickstats_snapshot_ye%20dec%202017.ashx



MAP 1. Tourism Central Australia's Northern Territory Government funded operating area

Tourism Central Australia is the official industry association for the visitor economy in the #RedCentreNT. As such, the organisation works in partnership with stakeholders including all levels of Government to benefit the visitor economy.

Tourism Central Australia recognises the importance of tourism to the NT economy and the huge potential of the industry to further contribute to the economic development of the Northern Territory.

Deloitte continues to identify tourism as one of the 'Fantastic Five' industries; one of the five industries that has the greatest potential to position Australia for prosperity.^[1]

In the Northern Territory, with a 2020 financial target of tourism to be worth \$2.2b to the economy, we have already exceeded this target. With further investment on infrastructure, industry development and marketing, the Northern Territory can significantly grow in value not just to the NT economy, but the Australian economy.^[2]

Consumers participate in the visitor economy using multiple methods for information and booking purposes, such as digital media, television and print media and face to face



MAP 2. Tourism Central Australia's wider operating area

options. Along with the increase of channels used by the consumer, multiple devices and digital platforms are used throughout their experience.

The Northern Territory is dependent on air transport to connect the local towns and communities with Australian cities^[3]. Air access to Central Australia will continue to play a major role in the growth or otherwise of the tourism industry, none more so than in Alice Springs where the lack of an ongoing presence of a budget airline affects the area's competitiveness. If there is a generated increase in passenger demand to Central Australia, the need for aviation expansion will be required.^[4]

Global economic conditions can have major impacts on the local tourism economy given that just over 40% of all visitors to Central Australia come from overseas.^[5] The growth of travel and tourism is increasing at a greater rate than the global economy, continuing to benefit connecting industries.^[6]

^[1] See Deloitte's Positioning for Prosperity report, available at <https://www2.deloitte.com/au/en/pages/building-lucky-country/articles/positioning-for-prosperity.html>

^[2] Northern Territory Government. (2017). Northern Territory Budget 2017-18. (n.p.)

^[3] Department of Transport. (2016). Aviation Industry and Services Strategy 2020. (n.p.), p.6

^[4] Ibid. p.12

^[5] Tourism Research Australia. (2016). International Visitor Survey, (n.p.)

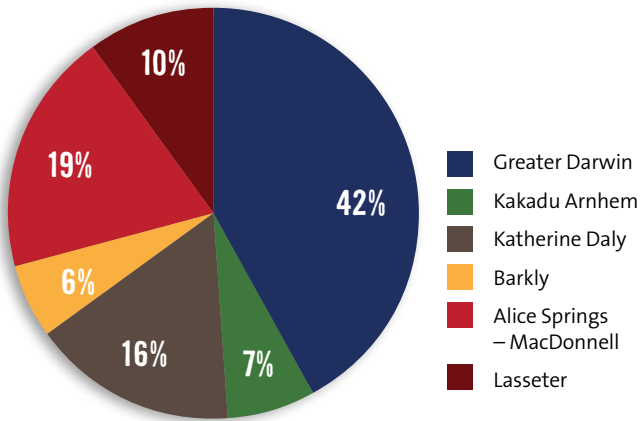
^[6] World Travel and Tourism Council. (2017). Travel and Tourism Economic Impact 2017 Australia. (n.p.)

Our Operating Context

THE FACTS

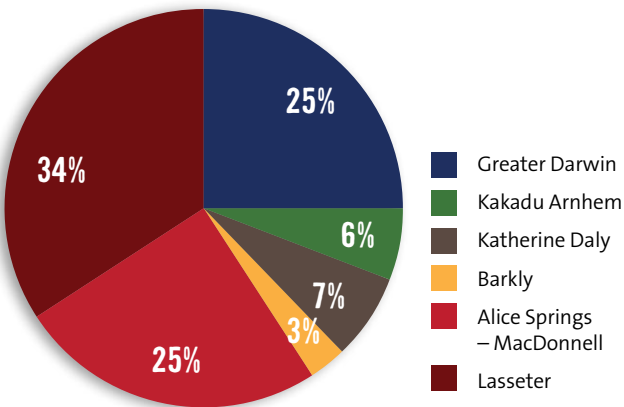
The total number of overnight holiday visitors to the Northern Territory in 2017 was 834,000, with international holiday visitation of 253,000 visitors. Of the total number of holiday visitors to the Northern Territory, 50% visited the #RedCentreNT.

Northern Territory Domestic Travel – Visitors By Region

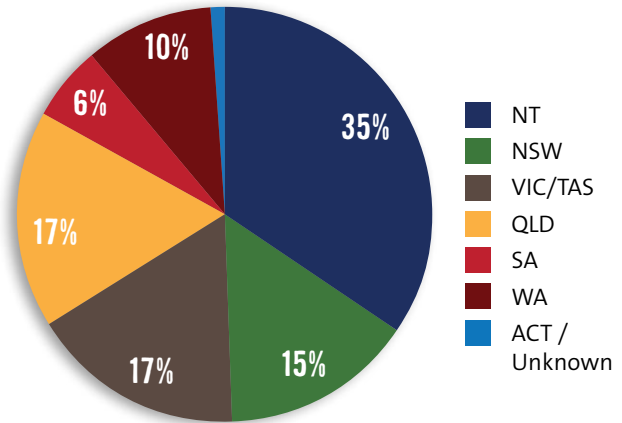


Central Australia received 419,000 overnight holiday visitors in 2017.

Northern Territory International Travel – Visitors By Region



Domestic Visitors to the #RedCentreNT – State/Territory of Origin



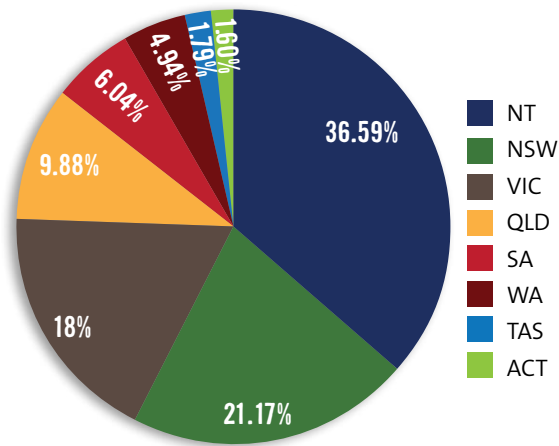
Visitors to Central Australia stay for an average of 4.8 nights, spending \$851m.

Domestic visitation is the greatest proportion of visitation and travel booking value to the Alice Springs VIC. Following can be found details on the number of travellers and value of their trade based on travel sales data recorded in the BookEasy booking system. This data includes all visitation and purchases since data began to be tracked on the BookEasy system in 2012.

Alice Springs remains the place from which visitors to the Northern Territory are most likely to disperse from. Despite this being the case dispersal from Alice Springs to the rest of the Northern Territory has suffered a gradual decline since 2010 from 70% to 62%. Dispersal from Lasseter and Barkly remains steady at 54% and 20% respectively.

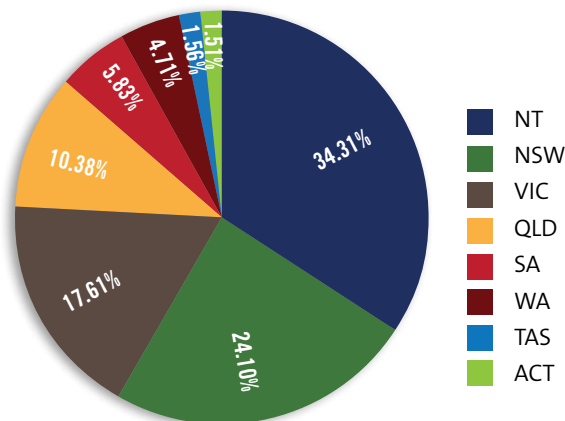
Our Operating Context

Bookings by Domestic Travellers at Alice Springs Visitor Information Centre, by Number of Bookings

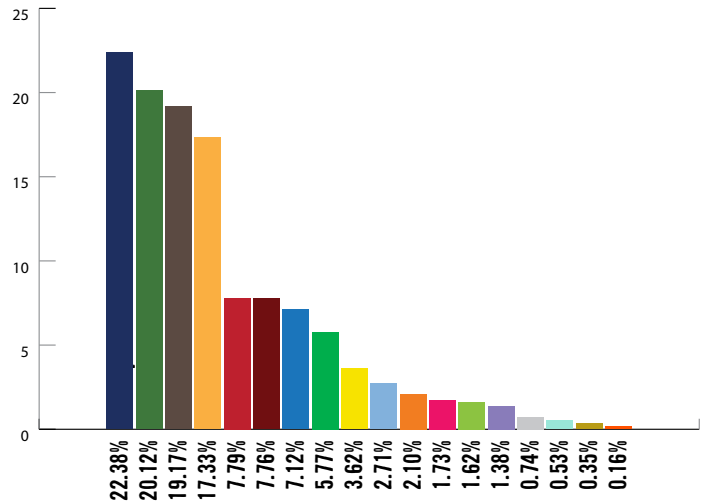


Whilst the share of bookings both value and quantity are comparable for most states, it is interesting to note that NSW provides slightly more value for money than the Northern Territory sourced bookings.

Bookings by Domestic Travellers at Alice Springs Visitor Information Centre, by Booking Value



Bookings by International Travellers at Alice Springs Visitor Information Centre, by Number of Bookings

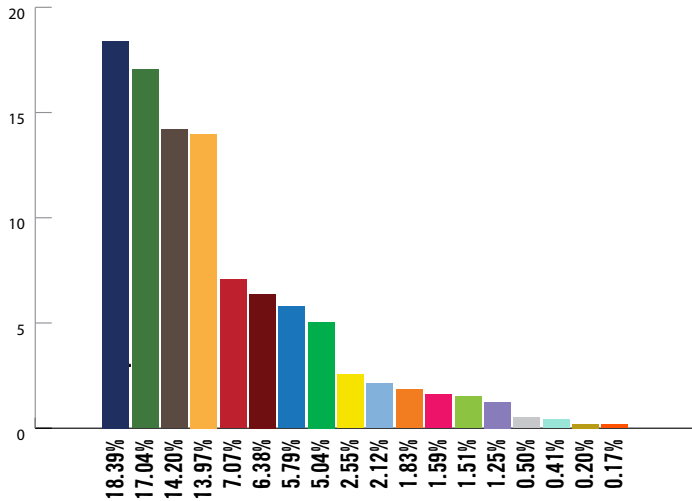


- Other EU
- Germany
- UK
- North America
- Switzerland
- France
- New Zealand
- Italy
- Other Asia
- China
- Japan
- Hong Kong
- Taiwan
- South America
- Middle East
- Pacific Islands
- Russia
- Africa

International visitors to the Northern Territory primarily arrive from (in order) USA, UK, Germany, Japan, NZ and Greater China, with European source nations and Canada rounding out the top 10 source markets.

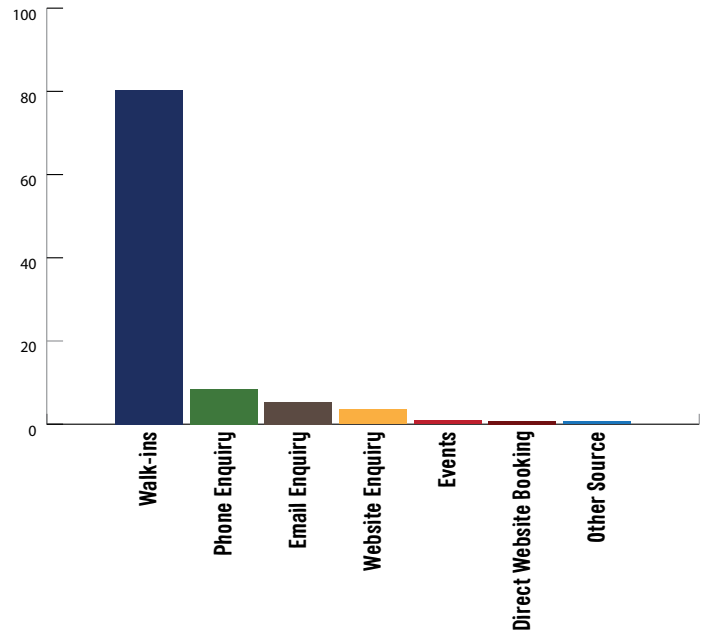
Our Operating Context

Bookings by International Travellers at the Alice Springs Visitor Information Centre, by Value



- Other EU
- Germany
- UK
- North America
- Switzerland
- France
- New Zealand
- Italy
- Other Asia
- China
- Japan
- Hong Kong
- Taiwan
- South America
- Middle East
- Pacific Islands
- Russia
- Africa

Booking Sources at the Alice Springs Visitor Information Centre by Number of Bookings



- Walk-ins
- Phone Enquiry
- Email Enquiry
- Website Enquiry
- Events
- Direct Website Booking
- Other Source







Walk-ins have always been the largest source of bookings for the centre, however in recent years has declined in its total share (from 84% in 2016-2017 to 80% in 2017-2018). Phone and website enquiries have increased in share, demonstrating a gradual shift in consumer preferences. Phone enquiries have remained stable. As digital means of enquiry have increased, a staff member has been allocated to focus on this area to grow our business.

The top 4 international traveller source regions provide a higher average booking value than most other travellers.

MODES OF TRANSPORT







Visitors to Central Australia utilise a variety of modes of transport. The following three tables show the various modes of transport used to get to each of the three regions that make up Central Australia.

TRANSPORT USED - HOLIDAY VISITORS - BARKLY REGIONAL

						
	FLY ONLY	FLY/DRIVE	DRIVE ONLY	COACH/BUS	TRAIN	OTHER
INTERSTATE	0%	15%	42%	8%	0%	0%
INTRA-TERRITORY	0%	7%	79%	0%	0%	0%
INTERNATIONAL	1%	46%	28%	0%	4%	21%







(NB: Figures may not add up to 100% as some responders were not asked this question and some may have used multiple forms of transport)

TRANSPORT USED - HOLIDAY VISITORS - ALICE SPRINGS/MCDONNELL

						
	FLY ONLY	FLY/DRIVE	DRIVE ONLY	COACH/BUS	TRAIN	OTHER
INTERSTATE	32%	15%	35%	13%	8%	1%
INTRA-TERRITORY	3%	0%	94%	0%	0%	2%
INTERNATIONAL	58%	19%	5%	3%	5%	24%

(NB: Figures may not add up to 100% as some responders were not asked this question and some may have used multiple forms of transport)

TRANSPORT USED - HOLIDAY VISITORS - LASSETER REGIONAL

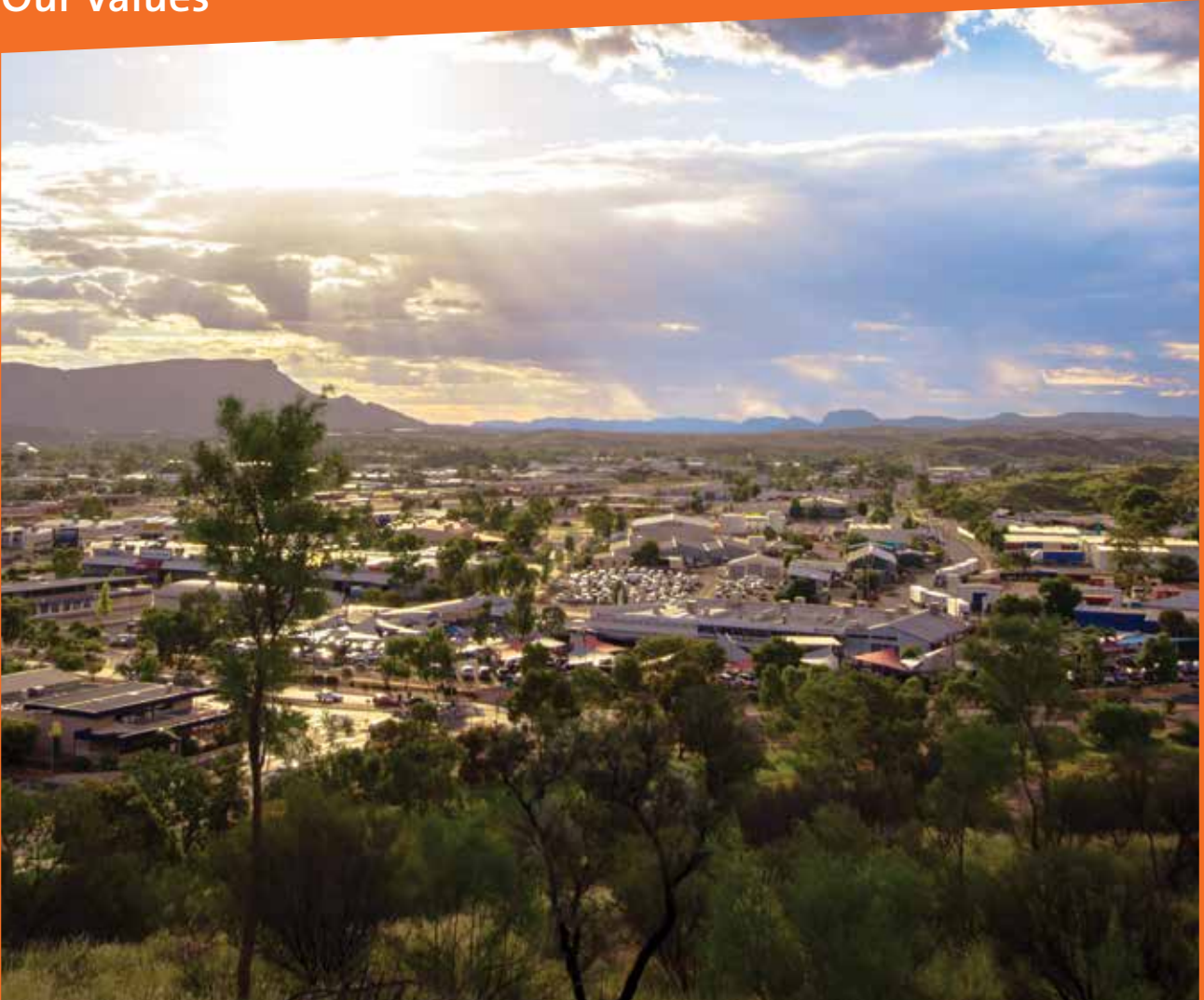
						
	FLY ONLY	FLY/DRIVE	DRIVE ONLY	COACH/BUS	TRAIN	OTHER
INTERSTATE	39%	15%	31%	12%	0%	1%
INTRA-TERRITORY	1%	8%	74%	8%	0%	0%
INTERNATIONAL	59%	16%	4%	0%	3%	24%

(NB: Figures may not add up to 100% as some responders were not asked this question and some may have used multiple forms of transport)

Data courtesy of Tourism NT.

This data enables Tourism Central Australia to better understand the visitor economy, to identify trends in visitation and expenditure statistics that will help us focus on the best allocation of resources to programs and projects.

Our Values



Tourism Central Australia holds the following as the key values of the organisation:

- Integrity - Tourism Central Australia's staff, Board and volunteers believe that being honest and having strong moral principles are essential. Integrity includes transparency, respect and commitment to all responsibilities.
- Engagement - Teamwork is vital for organisational success. Tourism Central Australia staff, Board and volunteers actively engage with each other, members and stakeholders to maintain a cohesive and collaborative tourism industry.
- Adaptability - Change is constant. Tourism Central Australia adapts and evolves through these changes, and continually improves, keeping ahead of competitors.
- Consideration - Tourism Central Australia are here to help people create lifelong positive memories; whether it be members and stakeholders, or customers who plan and book their special trips.

Tourism Central Australia - Strategic Focus Areas

IMMEDIATE NEEDS



ADVOCACY

National Aboriginal Art Gallery and National Indigenous Cultural Centre

Advocate for their development, and co-location of the sites.
Advocate for the inclusion of the Alice Springs Visitor Information Centre on this site.

East MacDonnell Ranges/Plenty Region Tourism Masterplan

Ensure the Alcoota fossil site is in the plan as a location for tourism development.



MARKETING & COMMUNICATIONS

Investigate niche trails to enhance the visitor experience



VISITOR INFORMATION SERVICES

Continue to operate an accredited Visitor Information Centre in Alice Springs

MEDIUM TERM



VISITOR INFORMATION SERVICES

Visitor Information Delivery

Investigate information delivery options and partnerships across our operational area.
Investigate a future ideal location for the Alice Springs Visitor Information Centre.
Increase information delivery methods to encourage repeat and dispersed visitation from Ulu u-Kata Tju a National Park and Yulara precinct.



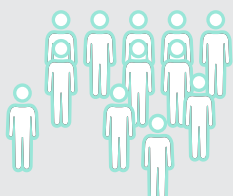
INCOME DEVELOPMENT FOR TOURISM CENTRAL AUSTRALIA

Membership Review Implementation

Conversion Options

Investigate the potential for Alice Springs Visitor Information Centre to be a travel agency.
Investigate other income sources, and grow existing revenue sources.

LONG TERM



EVENTS

Implement the #RedCentreNT Regional Events Strategy

Advocate for funding of the implementation plan
Develop partnerships to implement the plan

Tourism Central Australia - Strategic Focus Areas

ONGOING



ADVOCACY

Improve Drive Access

- Continued sealing of the Outback Way.
- Advocate for sealing of the Mereenie Outer Loop.
- Advocate for sealing of the Ellery Creek access road.
- Advocate for the widening of the Ross Highway.
- Advocate and educate for ease of access on CLC permitted roads.
- Advocate for the widening and sealing of the verges on the Lasseter Highway.

Leverage and Support the Turbocharging Tourism Policy

Barkly Region Tourism Masterplan

- Advocate for funding to implement the plan



MARKETING AND COMMUNICATIONS

- Market our Outback Adventure Experiences



MEMBER CAPACITY BUILDING

Digital Capacity Development

- Investigate partnership delivery options to upskill tourism businesses in digital technologies.
- Investigate the potential for fee for service delivery of digital upskilling programs.



INCOME DEVELOPMENT FOR TOURISM CENTRAL AUSTRALIA

- Leverage the Department of Tourism and Culture Partnership in Alternative Services Delivery.



**TOURISM
CENTRAL AUSTRALIA**

Your Tourism Voice



**TOURISM
EMPLOYS
16,300**

people in the NT, up 1.2%¹



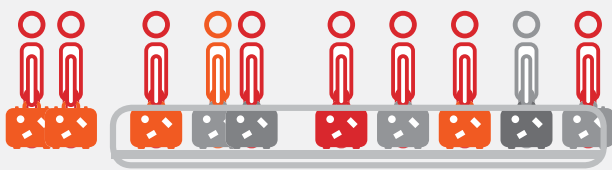
9,100

people directly employed



7,200

people indirectly employed



PASSENGER MOVEMENTS AT #REDCENTRENT AIRPORTS

ALICE SPRINGS AIRPORT 617,186² • AYERS ROCK AIRPORT 364,818²



**TOURISM
IS WORTH
\$851m**

in visitor expenditure
to the #RedCentreNT³



**419,000
OVERNIGHT
VISITORS**

come to the #RedCentreNT
every year, with an average
stay of 4.8 nights³



\$1,599
is generated in the
VISITOR ECONOMY

for every \$1 of Government
funding provided to Tourism
Central Australia (11% higher
than like organisations)⁴



**ALICE SPRINGS VISITOR
INFORMATION CENTRE SERVES**

>90,000

people each year, and a further
>50,000 are serviced through our
website, over the phone and by email.



HELP US ACHIEVE OUR 5 YEAR STRATEGIC VISION, 2018 – 2023

ADVOCACY

- National Aboriginal Art Gallery and National Indigenous Cultural Centre
- East MacDonnell Ranges/Plenty Region Tourism Masterplan
- Improve Drive Access
- Leverage and Support the Turbocharging Tourism Policy
- Barkly Region Tourism Masterplan

MARKETING AND COMMUNICATIONS

- Niche Trails
- Outback Adventure Experiences

VISITOR INFORMATION SERVICES

- Alice Springs Visitor Information Centre Operation and Location
- Visitor Information Delivery Expansion

INCOME DEVELOPMENT

- Membership Review Implementation
- Sales Conversion Opportunities
- Leverage the Partnership Agreement With the Northern - Territory Government

EVENTS

- #RedCentreNT Regional Events Strategy Implementation

MEMBER CAPACITY BUILDING

- Digital Capacity Development



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