

TOURISM CENTRAL AUSTRALIA
STRATEGIC PLAN
2019 – 2024



TOURISM
CENTRAL AUSTRALIA

Your Tourism Voice

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Our Operating Context

Introduction from the Chair



I am pleased to present the Tourism Central Australia Strategic Plan for 2019 – 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.

The ongoing support of the Northern Territory Government with the 5-year funding agreement to assist in the operation of the Alice Springs Visitor Information Centre is essential to the organisation's success.

This ongoing 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 ongoing support and confidence in Tourism Central Australia. I also thank the NT Government for their continued Turbocharging Tourism Funding, which sees 2 further years of increased investment in the Tourism Sector.

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;

- Implementation of our new Membership structure, allowing a streamlined membership structure and flexibility for our members. It was exciting to receive the prestigious DK Shifflet Award, International Tourism & Travel Research Award for this piece work, in conjunction with our consultant

- Winning the NT Tourism Brolga Award for Visitor Information services for the 4th year in a row and going on to win a Bronze at the Qantas Australian Tourism Awards
- 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
- Continuing our strong strategic focus on revenue growth

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. These projects are so important and are real game changers for the Red Centre.
- Continuing to be a strong voice for increased airline capacity and a reduction in airfare cost to the Red Centre
- One new initiative is work with Members to deliver vital front-line staff induction programs aimed at increasing staff awareness and knowledge
- Looking to expand TCA's participation in Australian based trade missions to build agent and consumer understanding of our destination
- Internally we are looking to continue to streamline and professionalise our operations including vital operating systems such as a CRM and work on the Tourism Development role to build industry capacity

Tourism is in an exciting phase with record NT Government investment into the industry and Tourism Central Australia looks forward to helping grow the 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.

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.

Key Challenges

Background

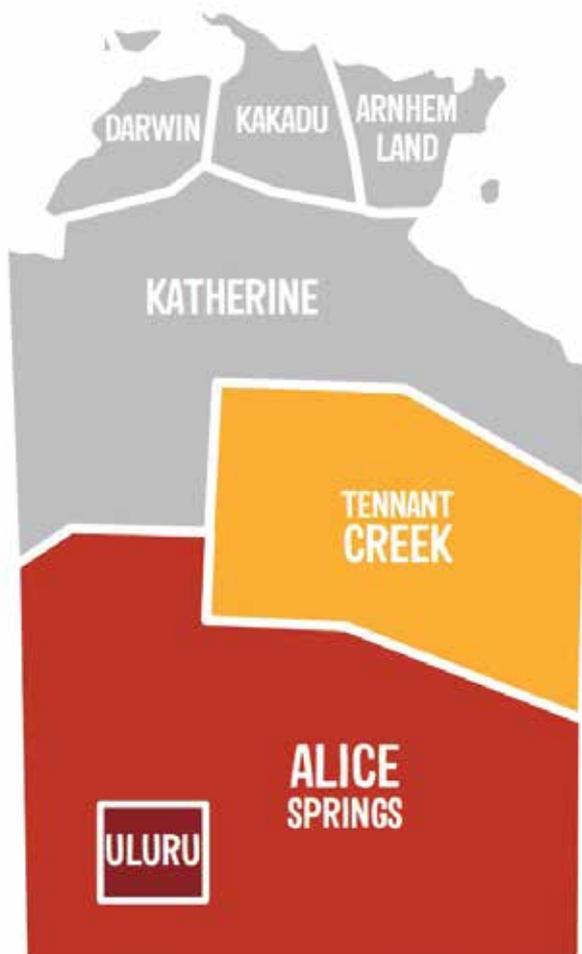
The #RedCentreNT region is the adventure capital of Australia. It is a loose region of outback areas, from northern outback South Australia in the south to Newcastle Waters in the north, and from the edge of the Gibson Desert near the WA border to the Queensland border including the Simpson Desert, encompassing 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 \$2.23b to the Northern Territory, with \$855m 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] For more information see the Visitation to the NT Snapshot for the Year Ending September 2018 at http://www.tourismnt.com.au/~media/files/corporate/research/quickstats_snapshot_ye%20sep%202018.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 around a third 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] See the Visitation to the NT Snapshot for the Year Ending September 2018 at http://www.tourismnt.com.au/~//media/files/corporate/research/quickstats_snapshot_ye%20sep%202018.ash

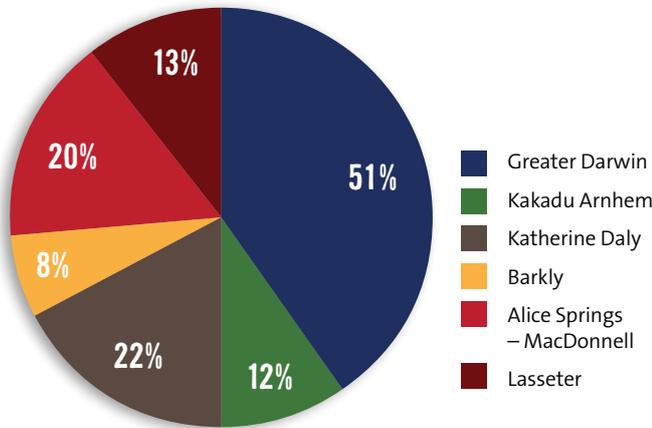
^[6] World Travel and Tourism Council. (2017). Travel and Tourism Economic Impact 2017 Australia. (n.p.)

Our Operating Context

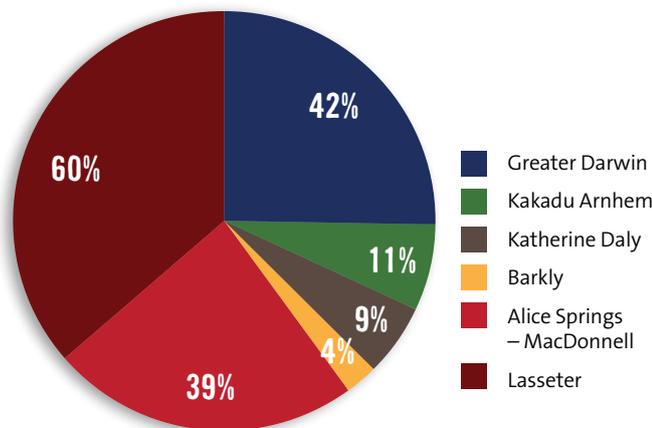
The Facts

The total number of overnight holiday visitors to the Northern Territory in 2018 was 912,000. Of the total number of holiday visitors to the Northern Territory, approximately 40% visited the #RedCentreNT.

Northern Territory Domestic Travel*
– Visitors By Region

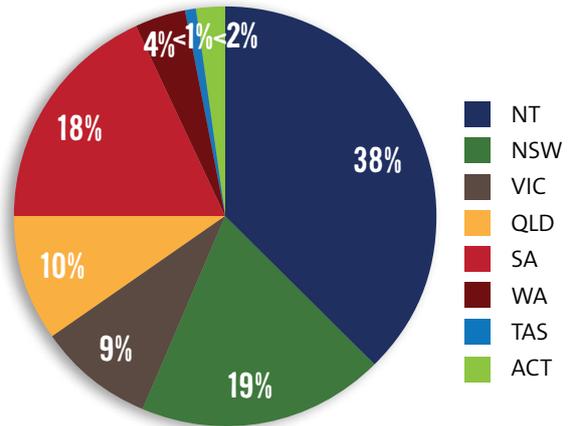


Northern Territory International Travel*
– Visitors By Region



*Figures add up to more than 100% as many visitors visit multiple regions during their travel.

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

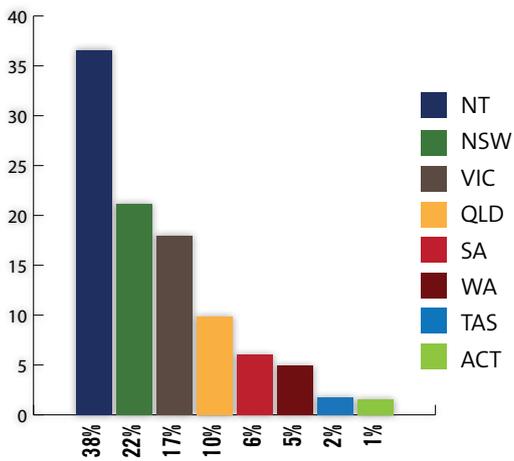


Visitors to Central Australia stay for an average of 4.5 nights, spending \$779m.

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.

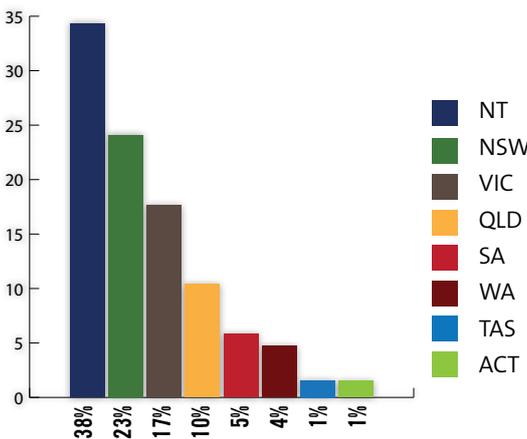
Our Operating Context

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

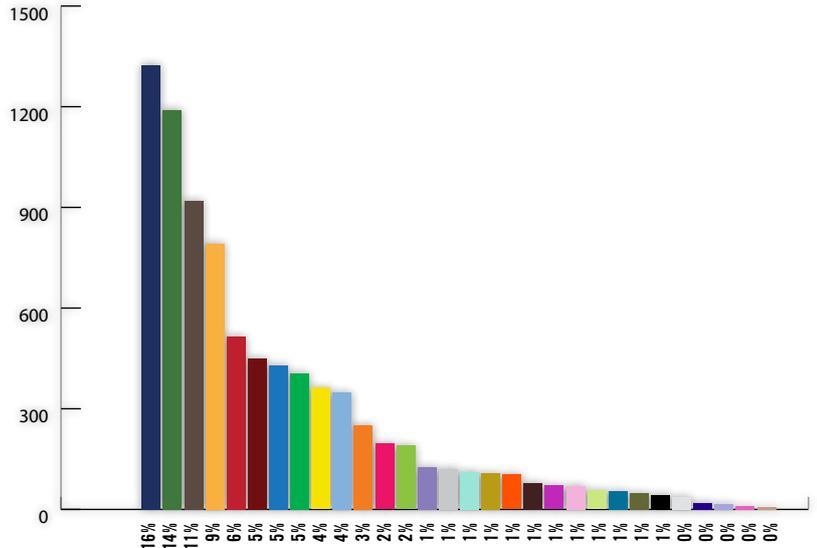


The share of bookings by both value and quantity are comparable for all States and Territories.

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

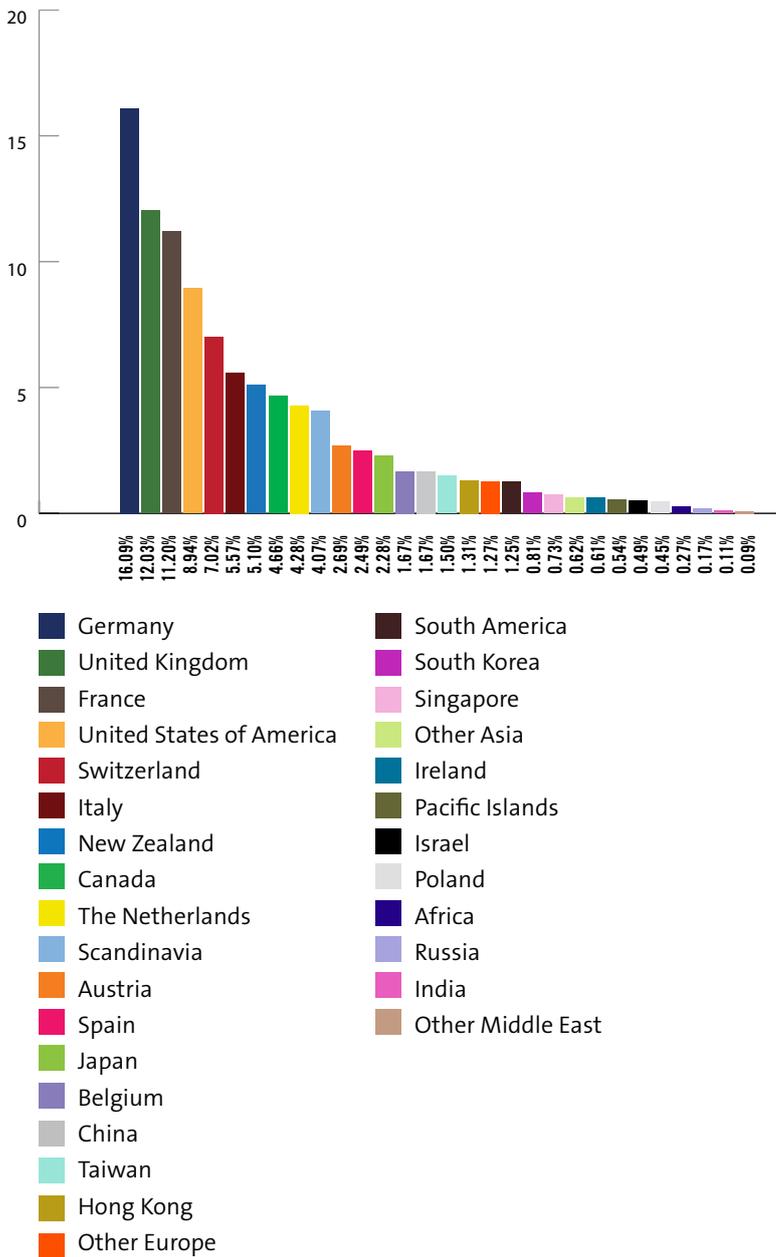


- Germany
- United Kingdom
- France
- United States of America
- Switzerland
- New Zealand
- Italy
- Canada
- Scandinavia
- The Netherlands
- Austria
- Japan
- Spain
- China
- Belgium
- Other Europe
- Taiwan
- Hong Kong
- South Korea
- South America
- Other Asia
- Singapore
- Ireland
- Israel
- Poland
- Pacific Islands
- Africa
- Russia
- Other Middle East
- India

Germany, the United Kingdom, France, the USA and Switzerland are the top five performing countries of visitor origin by both value and number of bookings. China, Hong Kong and Taiwan continue to grow as a booking source region, however Europe still is the source of most of our international bookings in both volume and value.

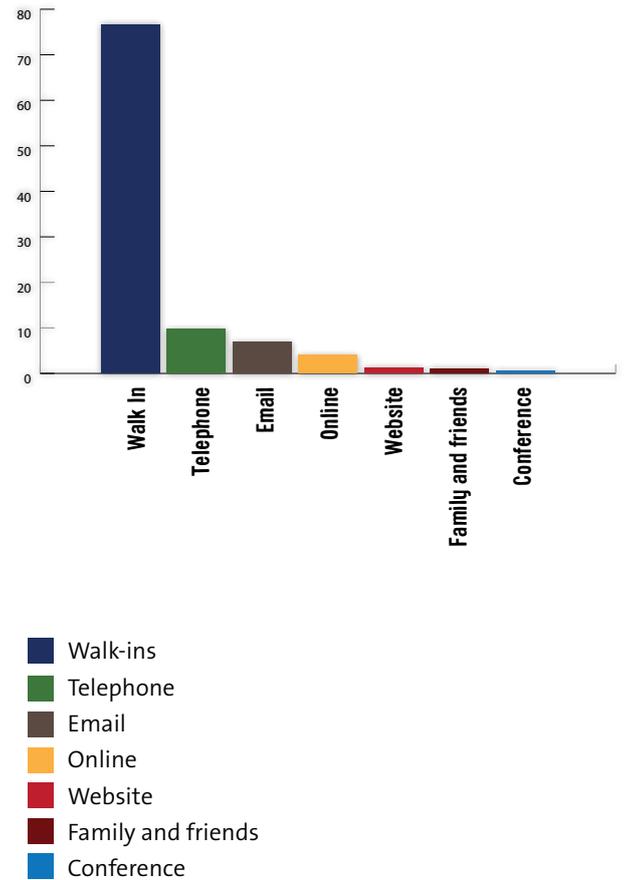
Our Operating Context

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



The top five source markets by value provide more than half of the total international bookings spend at the Alice Springs VIC.

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



Walk-ins have always been the largest source of bookings for the centre, however the proportion of walk-ins to other sources of bookings is shifting. In the 2016-2017 financial year, 84% of bookings came from walk-ins. In the 2018-2019 financial year, this had reduced to 76%, with all other forms increasing in proportion. When considering email bookings, bookings made through the website enquiry form, Live Chat generated bookings and Gold online bookable products together, these now make up 12% of our booking proportion. Digital methods of enquiry and booking continue to grow.

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%	11%	55%	1%	0%	32%
INTRA-TERRITORY	1%	4%	95%	0%	0%	0%
INTERNATIONAL	2%	42%	37%	19%	0%	0%

(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/MACDONNELL

						
	FLY ONLY	FLY/DRIVE	DRIVE ONLY	COACH/BUS	TRAIN	OTHER
INTERSTATE	33%	13%	40%	5%	5%	13%
INTRA-TERRITORY	5%	1%	94%	0%	0%	0%
INTERNATIONAL	57%	19%	7%	31%	3%	1%

(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	46%	14%	34%	3%	0%	8%
INTRA-TERRITORY	0%	1%	99%	0%	0%	0%
INTERNATIONAL	58%	14%	5%	28%	0%	0%

(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)

Note: Figures are 3 year average for YE Dec 16 -18 due to low sample sizes

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.

Tourism Central Australia - Strategic Focus Areas

EXTERNAL SERVICES

ADVOCACY

- ▶ Advocate for the development of the National Aboriginal Art Gallery and National Indigenous Cultural Centre (High Priority)
- ▶ Advocate for an increase in air routes and reduction in air fares to the #RedCentreNT (High Priority)
- ▶ Create and implement an Advocacy Plan highlighting the importance of tourism to the NT and Australian economies
- ▶ Advocate for the continuation of increased government investment in tourism, such as Turbocharging Tourism



VISITOR INFORMATION SERVICES

- ▶ Continue refreshing and expanding our visitor servicing program (High Priority)
- ▶ Continue focussing on sales conversion opportunities to increase TCA's financial sustainability
- ▶ Create and implement an Alice Springs Induction Program for front line staff of member businesses



MARKETING & COMMUNICATIONS

- ▶ Participate in Australian based travel missions, to build agent and consumer understanding of the destination and how to access it (High Priority)
- ▶ Continue promoting the #RedCentreNT as the Adventure Capital of Australia
- ▶ Investigate food trails as a marketing option, in addition to continuing other trail marketing



INTERNAL SERVICES

TOURISM INDUSTRY DEVELOPMENT

- ▶ Continue to fund a Tourism Industry Development role to work with businesses on capacity development (High Priority)
- ▶ Implement the #RedCentreNT Leisure Events Strategy through partnerships (High Priority)
- ▶ Assist in implementing the East MacDonnell Ranges and Plenty Region Tourism Masterplan
- ▶ Assist in implementing the Barkly Region Tourism Masterplan
- ▶ Assist in implementing the Ntaria/Hermannsburg Tourism Masterplan
- ▶ Assist in implementing the NT Mountain Biking Tourism Masterplan



MEMBERSHIP & STAKEHOLDER ENGAGEMENT AND PROMOTION

- ▶ Finalise CRM installation for TCA (High Priority)
- ▶ Create a destination intelligence framework, to communicate market intelligence to members (High Priority)
- ▶ Leverage the partnership with the Northern Territory Government (High Priority)
- ▶ Identify the most engaging suite of communication methods for members and implement them
- ▶ Identify and develop methods of intra-regional industry co-operation



ORGANISATIONAL DEVELOPMENT

- ▶ Identify and implement new revenue streams
- ▶ Investigate fee for service marketing options





TOURISM EMPLOYS 16,300
people in the NT¹

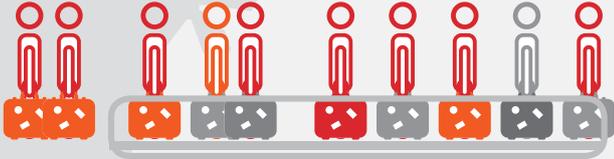
9,100
people directly employed

7,200
people indirectly employed



TOURISM CENTRAL AUSTRALIA

Your Tourism Voice



PASSENGER MOVEMENTS AT #REDCENTRENT AIRPORTS
ALICE SPRINGS AIRPORT 615,058²
AYERS ROCK AIRPORT 380,266²



TOURISM IS WORTH \$779m
to the #RedCentreNT economy³



475,000 OVERNIGHT VISITORS
come to the #RedCentreNT every year, with an average stay of 4.5 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 >80,000
people each year, and a further >150,000 are serviced through our website, over the phone and by email



52% of all **INTERNATIONAL TRAVELLERS** to Uluru also visit Alice Springs and surrounds⁵



45% of all **DOMESTIC TRAVELLERS** to Uluru also visit Alice Springs and surrounds⁵



HELP US ACHIEVE OUR 5 YEAR STRATEGIC VISION, 2019 – 2024

EXTERNAL SERVICES

ADVOCACY



- ▶ Advocate for the development of the National Aboriginal Art Gallery and National Indigenous Cultural Centre
- ▶ Advocate for an increase in air routes and reduction in air fares to the #RedCentreNT

VISITOR INFORMATION SERVICES



- ▶ Continue refreshing and expanding our visitor servicing program

MARKETING & COMMUNICATIONS



- ▶ Participate in Australian based travel missions, to build agent and consumer understanding of the destination and how to access it

INTERNAL SERVICES

TOURISM INDUSTRY DEVELOPMENT



- ▶ Continue to fund a Tourism Industry Development role to work with businesses on capacity development
- ▶ Implement the #RedCentreNT Leisure Events Strategy through partnership

MEMBERSHIP & STAKEHOLDER ENGAGEMENT & PROMOTION



- ▶ Finalise CRM installation for TCA
- ▶ Create a destination intelligence framework, to communicate market intelligence to members
- ▶ Leverage the partnership with the Northern Territory Government

ORGANISATIONAL DEVELOPMENT



Your Tourism Voice

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Corner of Todd Mall & Parsons Street, Alice Springs
1800 645 199 or info@discoverca.com.au
www.discovercentralaustralia.com



¹Tourism Research Australia's State Tourism Satellite Accounts, 2016-2017 | ²Bureau of Infrastructure, Transport and Regional Economics airport traffic data | ³Northern Territory Tourism – Latest Visitor Data Snapshot, year ending December 2017 | ⁴2016-2017 Aspire Report | ⁵Uluru and Surrounds Regional Report YE June 2016-2018, available at http://www.tourismnt.com.au/~media/files/corporate/research/tnt_lasseter-profile_jun-18.ashx



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