



TOURISM INFRASTRUCTURE POLICY & PRIORITIES





Tourism infrastructure
policy and priorities
document prepared in 2008

The Tourism & Transport Forum's (TTF) earlier Tourism Infrastructure Policy and Priorities document was released in 2008 to inform the Infrastructure Priority List developed by newly-formed Infrastructure Australia. Recognising the ability of tourism infrastructure to achieve economic, social and environmental objectives of government, TTF prioritised projects for infrastructure investment in regional and metropolitan Australia.

Five years on TTF in partnership with industry has revised and further identified key projects necessary to support sustainable growth for the sector into the future.

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EXECUTIVE SUMMARY

Investing in tourism infrastructure is critical to driving demand for travel to and within Australia. This travel generates economic activity which supports the employment of hundreds of thousands of Australians in every region of the country.

Publicly-funded tourism infrastructure should improve a destination's appeal to visitors by creating or updating unique experiences or by improving access to existing tourism attractions.

TTF acknowledges the difficult task governments face in determining where to spend limited resources and understands that taxpayers expect their money to be spent wisely.

It is therefore vital a strategy is in place to prioritise tourism infrastructure development that will maximise return on investment. The strategy must address instances of market failure in the provision of tourism infrastructure and prioritise investment in those destinations which offer the best chance of delivering additional economic activity.

The provision of publicly-funded tourism infrastructure can lead to additional investment by the private sector in complementary products and services, including accommodation, attractions and events venues. This makes it critical to maintain priority infrastructure commitments over time to give businesses the certainty they require to make investment decisions.

The strategy must also be consistent with existing programs, such as Australia's National Landscapes program, and with the promotional activities of state and national tourism agencies.

TTF's *Tourism Infrastructure Policy & Priorities* provides a blueprint for tourism investment which will deliver the best outcomes for the national economy and assist with reaching the Tourism Industry Potential target of doubling overnight tourism expenditure to \$140 billion by 2020.

INTRODUCTION

Tourism is one of the most globally competitive industries, with virtually every country around the world trying to attract visitors from home and abroad. It is therefore essential that Australia is able to offer desirable products and experiences. With infinite demands for finite government resources, it is critical money invested in tourism infrastructure delivers the greatest return on that investment.

The common perception is that tourism is leisure travel – people on holidays or visiting friends and family. Yet, the reality is that people travel to and within Australia for a variety of different reasons including: education; employment; health; sport and athletic training; business; conferences, conventions and exhibitions; working holidays; and more. All of these travellers make contributions to the visitor economy, creating employment opportunities across Australia.

Tourism infrastructure is a broad category which includes accommodation, event venues, parks facilities, dining and entertainment precincts, cultural and arts amenities, transport networks and interchanges, aviation, maritime and roads infrastructure and more. However, this infrastructure benefits more than visitors with improved amenity and greater economic and employment opportunities for local residents.

Sustained TTF advocacy on tourism infrastructure investment has resulted in positive outcomes for the sector: for example, construction has begun on expanded facilities at the Adelaide Convention Centre, the Three Capes Track has progressed in Tasmania, and the Museum of Contemporary Art Australia has recently opened its new facilities in Sydney.

A RENEWED FOCUS

The adoption of the Tourism Industry Potential target by the Tourism Ministers' Council has implications for both the demand and supply side of tourism. A renewed focus on tourism product means now is the time to evaluate and re-assess those infrastructure projects that will make the greatest contribution to the visitor economy over the next decade, and help the sector achieve the goal of doubling overnight visitor expenditure to \$140 billion by 2020.

TTF's *Tourism Infrastructure Policy & Priorities* paper will highlight key projects identified by industry as necessary to support the sustainable growth of the sector.

The document will be used to inform TTF's ongoing advocacy and provide a targeted list of projects when commonwealth and state funding becomes available.



THE IMPORTANCE OF THE VISITOR ECONOMY

Tourism is defined and measured by the Australian Bureau of Statistics' Tourism Satellite Account¹. Tourism consumption in Australia totalled \$95.7 billion in 2010-11. This consumption provides considerable economic and employment benefits across multiple sectors and regions of the country.

CONSUMPTION	\$95.7 BILLION
GDP	\$34.6 BILLION
EMPLOYMENT	513,700
EXPORTS	\$23.7 BILLION
NET TAXES ON TOURISM PRODUCTS	\$7.2 BILLION

GROSS DOMESTIC PRODUCT (GDP)

In 2010-11, tourism directly contributed \$34.6 billion to the Australian economy, accounting for 2.5 per cent of total GDP. Discounting the effects of product taxes across the supply chain, tourism accounted for \$31.5 billion in gross value added (GVA) – more than power, water and waste services and almost nine-tenths the GVA of agriculture, forestry and fishing.

Adding the indirect contribution, which is measured by Tourism Research Australia, tourism contributes a total of \$73.3 billion to the economy, representing 5.2 per cent of total GDP².

EMPLOYMENT

Tourism directly employs 513,700 persons – nearly 100,000 more than financial and insurance services, one and a half times more than agriculture, forestry and fishing, and two and a half times more than mining. Tourism indirectly employs a further 393,400 persons, accounting for a total of 7.9 per cent of national employment.

TAX REVENUE

In 2010-11, tourism activity generated \$7.2 billion in net taxes to government revenue.

EXPORTS

Tourism exports account for 8.0 per cent of all Australian exports, totalling \$23.7 billion in 2010-11.

This is nearly eight times the value of wool and sheepskin exports and more than three times the value of cereal grains, trailing only metal ores and minerals, and coal, coke and briquettes.

LOOKING AHEAD TO 2020

The Tourism Forecasting Committee expects international arrivals to increase by 38 per cent to almost 8.2 million, while domestic visitor nights are forecast to total almost 274 million³.

The Australian Government, together with all the states and territories, has endorsed a target for increasing visitor expenditure by 2020 higher than the official forecast from the Tourism Forecasting Committee. This aspirational goal, to double overnight visitor spending in Australia between 2009 and 2020 to \$140 billion, is a cornerstone of Tourism 2020, the policy update of the National Long-Term Tourism Strategy (NLTS), announced in December 2011.

Key to being able to accommodate this growth is appropriate investment in tourism infrastructure which underpins tourism product and encourages visitor expenditure (see Table 1 which highlights expenditure across infrastructure and product categories).

¹ Tourism Satellite Account, Australian National Accounts, cat no. 5249.0, Australian Bureau of Statistics

² Tourism's Contribution to the Australian Economy, 1997-98 to 2010-11, Tourism Research Australia

³ Tourism Forecasting Committee, Forecast 2012 Issue 1, Tourism Research Australia.

TABLE 1: TOURISM INFRASTRUCTURE, PRODUCT AND RELATED EXPENDITURE

INFRASTRUCTURE & TOURISM PRODUCT	EXPENDITURE ITEMS	EXPENDITURE (\$B)
ACCOMMODATION AND HOSPITALITY		\$34.7
Hotels, motels, hostels, apartments, resorts Restaurants, cafes, takeaway diners Bars, nightclubs, liquor shops	Accommodation, alcohol, food and drinks, groceries, takeaway and restaurant meals	
RETAIL		\$11.3
Retail outlets, shopping centres, retail precincts Souvenir shops, art and handicraft stores	Shopping to take home and to use in Australia, gifts, souvenirs	
PRIVATE AND LONG-DISTANCE TRANSPORT		\$10.9
Rental vehicles, coach services, car dealerships Fuel stations, roads, railways Cruise shipping terminals, ports	Car hire, motor vehicles, fuel, vehicle maintenance and repair, long-distance public transport and other long-distance transport	
AVIATION		\$6.2
Airports, airfields, access roads	International and domestic airfares	
EDUCATION		\$3.7
Educational institutions, libraries, Book shops, stationary suppliers	Education and course fees	
ATTRACTIONS AND EVENTS		\$3.2
Convention and exhibition space Sporting stadia Entertainment and recreation facilities Casinos, racetracks and gaming facilities National parks and visitor infrastructure Museums, galleries, casinos, racetracks	Zoos and aquariums, sporting events and training, entertainment, museums, movies, horse racing, gambling, casinos, convention, conference and exhibition fees	
PACKAGES AND TOURS		\$2.3
Travel agencies, tour guides Packaged tours and group travel	Organised tours Package tours	
LOCAL TRANSPORT		\$1.4
Ferries, water taxis, taxi fleets, ports Urban heavy and light railways, bus operators	Taxis, local public transport, other local transport	
OTHER		\$2.3
Telecommunications, postal service Various other infrastructure	Phone, fax and postage, other expenditure	
TOTAL		\$76.1

Source Tourism Research Australia – International and National Visitor Surveys, June 2011 editions



DEFINING TOURISM INFRASTRUCTURE

Tourism infrastructure results from a mix of both private and public sector investment.

International airports and accommodation room stock, for example, represent private infrastructure, while roads, rail networks and seaports are typically public infrastructure. Infrastructure such as convention centres and national parks are public assets provided due to market failure or for social and environmental policy objectives.

It is also important to note that these assets are also economic infrastructure, generating expenditure by visitors, providing employment and underpinning regional development.

However, the provision of tourism infrastructure is often a complicated process because of the fragmented nature of the industry. Legislation and regulation can determine the viability (or otherwise) of a tourism investment.

While federal, state and territory governments have tourism ministers, the responsibility for many pieces of tourism infrastructure, including, airports, casinos, museums and national parks, generally falls outside the responsibility of the Minister for Tourism. Furthermore, the policy levers to plan, build, manage or regulate both public and private tourism infrastructure often lie outside the tourism portfolio (see Table 2). The potential influence of multiple portfolios on tourism policy issues makes a whole-of-government approach essential so that the right projects can be prioritised.

TOURISM INFRASTRUCTURE RESULTS FROM A MIX OF BOTH PRIVATE AND PUBLIC SECTOR INVESTMENT... IT IS IMPORTANT TO NOTE THAT THESE ASSETS ARE ECONOMIC INFRASTRUCTURE, GENERATING EXPENDITURE BY VISITORS, PROVIDING EMPLOYMENT AND UNDERPINNING REGIONAL DEVELOPMENT.

TABLE 2: GOVERNMENT PORTFOLIOS AND TOURISM INFRASTRUCTURE

GOVERNMENT PORTFOLIOS AND TOURISM INFRASTRUCTURE	
TYPICAL FEDERAL / STATE PORTFOLIOS Plan, build, manage or regulate infrastructure	TOURISM INFRASTRUCTURE Fundamental infrastructure for tourism access and product
Aviation	Airports and aviation capacity
Education	Tertiary education facilities
Environment	National parks and visitor facilities
Gaming and Racing	Casinos, racetracks and gaming facilities
Heritage and Arts	Museums, art galleries and cultural facilities
Indigenous Affairs	Indigenous tourism facilities
Planning, Lands and Local Government	Accommodation and precinct development
Regional Development	Infrastructure in regional tourism destinations
Sport and Recreation	Stadia, sporting venues and recreation facilities
State Development	Convention, exhibition and entertainment venues
Tourism	Minor infrastructure for product development
Transport and Infrastructure	Roads, passenger rail and cruise shipping ports

CRITICAL VISITOR INFRASTRUCTURE

It is important to understand the different types of tourism infrastructure and their role in supporting the visitor economy through the tourism supply chain. Tourism infrastructure can be broken into two core groups: demand drivers and supporting visitor infrastructure.

DEMAND DRIVERS

Demand drivers create and encourage visitation to a destination. Critically, they can extend the length of stay and increase visitor expenditure. Demand drivers are vital to ensure visitor dispersal to regional areas, spreading the economic benefits of tourism to communities outside capital cities and gateways.

Demand drivers are 'must-see' icons – like the Sydney Opera House – or they host activities that encourage travel. Demand drivers include convention and exhibition centres, stadia, and visitor attractions such as national parks, museums, art galleries, zoos and aquariums. Demand drivers are usually public infrastructure, requiring ongoing investment by government.

SUPPORTING VISITOR INFRASTRUCTURE

The visitor economy would not function without appropriate investment in supporting infrastructure including our airport, road, rail and ferry networks, as well as hotel accommodation.

While these pieces of infrastructure may not form the core purpose of travel, the quality and delivery of these facilities greatly impacts the visitor experience.



DEMAND DRIVERS

CONVENTION & EXHIBITION CENTRES



Business events (BE) are a \$17 billion industry in Australia⁴. The average international BE visitor, for example, spent \$3,641 per trip in 2011 – \$267 more than non-BE international visitors. Australia's major convention and exhibition centres are critical in facilitating large-scale business events. Major business events can attract up to 2,000-3,000 high-yielding visitors to a destination who each spend on accommodation, retail, hospitality and leisure tourism activities during their stay.

However, the size and nature of major exhibitions and conventions are changing. Increasingly, flexible convention and exhibition spaces are required to operate concurrent sessions. Australia also faces considerable competition from neighbouring South-East Asian countries that have invested significant capital in the expansion of their facilities.

Without addressing the capacity constraints of Australia's leading convention and exhibition centres, Australia will be unable to mount compelling event bids to attract convention and exhibition business to the country.

STADIA AND ENTERTAINMENT VENUES



Sports tourism is a popular and growing underlying purpose of travel. Sports tourism is estimated to represent approximately 5 per cent of all visitor travel in Australia, injecting \$3 billion per annum into the Australian economy⁵.

Stadia and sporting infrastructure need to be flexible enough to support multiple sporting codes as well as the influx of visitors that travel specifically to support their local team. Similarly, destinations can extend the economic contribution of sporting infrastructure in the off-season by accommodating athletes requiring year-round training.

These venues, along with dedicated entertainment venues and theatres, host concerts by international acts, musical theatre and music festivals, which encourage people to travel to see a concert, a one-off event or a show with a limited season. Precinct planning and transportation networks are critical in supporting sports tourism and associated events, as they generally require the movement of large volumes of people to and from a destination before and after an event.

ADELAIDE CONVENTION CENTRE

Following extensive advocacy from TTF ahead of the 2010 state election, the Rann government announced a \$394 million expansion of the Adelaide Convention Centre. Expanded facilities are expected to deliver an economic return of \$1.92 billion over the next 25 years⁶. The redevelopment of the Adelaide Convention Centre has been a catalyst for private and public sector investment in urban renewal projects along the Riverbank precinct, including the \$250 million upgrade to the Adelaide Casino, the refurbishment of the Intercontinental Hotel and the new Crowne Plaza hotel, and the \$535 million Adelaide Oval redevelopment.



⁴ A National Business Events Strategy for Australia 2020: The business of events – Australia's untapped potential, Business Events Strategy Group, 2008

⁵ Towards a National Sports Tourism Strategy, Industry Science Resources – Sport & Tourism Division, 2000

⁶ Media Release: \$350 Million Adelaide Convention Centre Redevelopment to bring \$1.92 billion business boost, 28 June 2011

NATIONAL PARKS

Two in three international visitors to Australia participate in some form of nature-based tourism. In 2010-11, 3.4 million international visitors participated in nature-based activities, spending \$3,841 per trip - \$497 more than the average international visitor⁷. Natural icons within Australia's national park system, including Uluru and Kata Tjuta, the Great Barrier Reef, and the Great Ocean Road, form a key component of Australia's destination branding and promotion. While the value of these regions has already been noted through the National Landscapes program, it must be recognised that consumer preferences for nature-based tourism activities are changing, with visitors wanting more immersive experiences in nature.

Australia requires smarter and more efficient investment in national park visitor infrastructure such as interpretive amenities, long-distance walking trails and viewing platforms, to facilitate iconic experiences that attract international and domestic visitors. Demand for low-impact accommodation to support extended stays in national park areas continues to increase, representing a potential source of revenue for parks agencies.



THREE CAPES TRACK

In 2010, TTF, in partnership with the Tasmania Parks & Wildlife Service and the Tourism Industry Council of Tasmania, secured \$25 million in joint commonwealth and state funding for the development of the Three Capes Track: a multi-day walking experience on the Tasman Peninsula. The track will include private sector investment in low-impact accommodation to support overnight stays as part of the long-distance walk. It is estimated the project will generate 334 jobs and contribute \$17.1 million per year to gross state product⁸.

⁷ International Visitor Survey, Tourism Research Australia, 2011

⁸ Economic Impact analysis for Three Capes Track, Tasman National Park, Seneca Consulting Pty Ltd prepared for Tasmanian Parks & Wildlife Service

VISITOR ATTRACTIONS

Australia's visitor attractions, including zoos, museums, art galleries, theme parks and aquariums, activate precincts and create reasons to travel to a destination. More Australians visit zoos each year than any other form of cultural entertainment activity apart from visiting the movies⁹.

In addition, museums, art galleries and theatres play a significant role in the interpretation of our culture by visitors. In 2010-11, 23.4 million visitors participated in some form of cultural tourism in Australia, representing half of all international visitors, one in seven of all domestic overnight

travellers and a further 7 per cent of all day trippers¹⁰. The significant investment made by many state major event companies to secure internationally recognised touring exhibitions such as *Masterpieces from Paris: Van Gogh, Gauguin, Cézanne & Beyond*; *Tutankhamun and the Golden Age of the Pharaohs*; and *Alexander the Great: 200 Years of Treasures*, encourages interstate and international visitation to Australia. Appropriate maintenance and expansion of cultural infrastructure is required to ensure Australia delivers world-class cultural experiences and exhibitions.

MUSEUM OF CONTEMPORARY ART AUSTRALIA

The \$53 million redevelopment of the Museum of Contemporary Art Australia (MCA) includes increased floor space and a new National Centre for Creative Learning to support international touring exhibitions and increased participation from the education market. The redevelopment was a result of joint funding from all levels of government and a \$15 million contribution from a private donor. The MCA is now better able to attract world-renowned exhibitions, including Annie Leibovitz: *A Photographer's Life 1990 – 2005*, which attracted 183,000 people over a five-month period from November 2010–April 2011¹¹.



Image courtesy © Museum of Contemporary Art Ltd. Brett Boardman Photography.

⁹ Aegis Consulting and Applied Economics, Report on the Economic and Social Contribution of the Zoological Industry in Australia, March 2009

¹⁰ National and International Visitor Surveys, Tourism Research Australia, 2011.

¹¹ Destination NSW, Sydney International Art Series 2011/12 Background

SUPPORTING VISITOR INFRASTRUCTURE

AIRPORT AND TRANSPORT LINKAGES



As an island nation, Australia is highly reliant on aviation for international visitation. As one of the largest countries we are also dependent on aviation for domestic leisure and business travel.

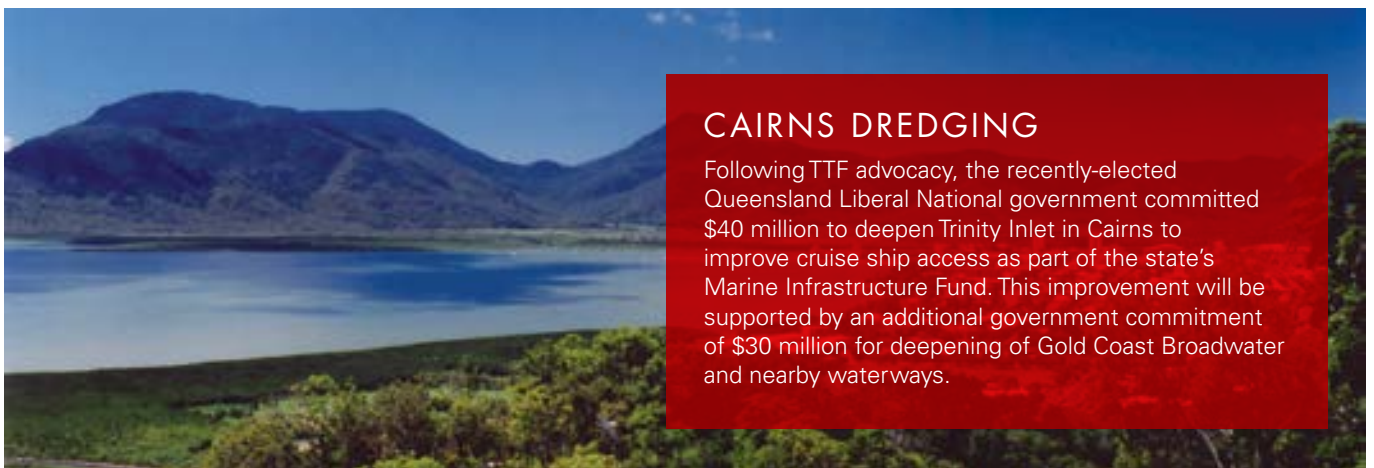
Capacity constraints at Australia's major airports inhibit growth in passenger movements, and inevitably the country's ability to achieve the Tourism Industry Potential target of growing overnight visitor expenditure to \$140 billion by 2020.

Furthermore, connectivity to and from Australia's major airports affects the visitor experience and perceptions of a destination. Recognising the importance of our major airports and connectivity to key destinations, TTF released its *Accessing Our Airports* paper in 2011, highlighting key infrastructure requirements at each major airport, including increasing public transport services and road upgrades.

CRUISE SHIPPING



Cruise shipping continues to be the fastest growing sector of the Australian tourism industry. In 2010-11, the cruise sector contributed \$830 million in GVA to the Australian economy¹². The advent of larger cruise ships, as well as multiple port calls, means current infrastructure, including supporting road networks, is unable to cope with passenger and freight movements. Without considerable investment in improved and expanded cruise infrastructure in Australia, growth in cruise visitation will be constrained.



CAIRNS DREDGING

Following TTF advocacy, the recently-elected Queensland Liberal National government committed \$40 million to deepen Trinity Inlet in Cairns to improve cruise ship access as part of the state's Marine Infrastructure Fund. This improvement will be supported by an additional government commitment of \$30 million for deepening of Gold Coast Broadwater and nearby waterways.

¹² Economic contribution of the cruise sector to Australia, Deloitte Access Economics, February 2012.

PUBLIC PRECINCTS AND RECREATION FACILITIES



Mixed-use public precincts including commercial, retail and hospitality services, can help attract both local residents and visitors to a destination. It is this mix of people, visiting for a range of purposes, which activates a precinct, encouraging people to stay longer and spend more at that destination. Mixed-used precincts are becoming more prevalent in the delivery of tourism experiences to multiple users in our major gateway destinations, evident through the expansion of South Bank in Brisbane, the Riverbank precinct in Adelaide, and the Waterfront development in Perth.

CITY ACCOMMODATION



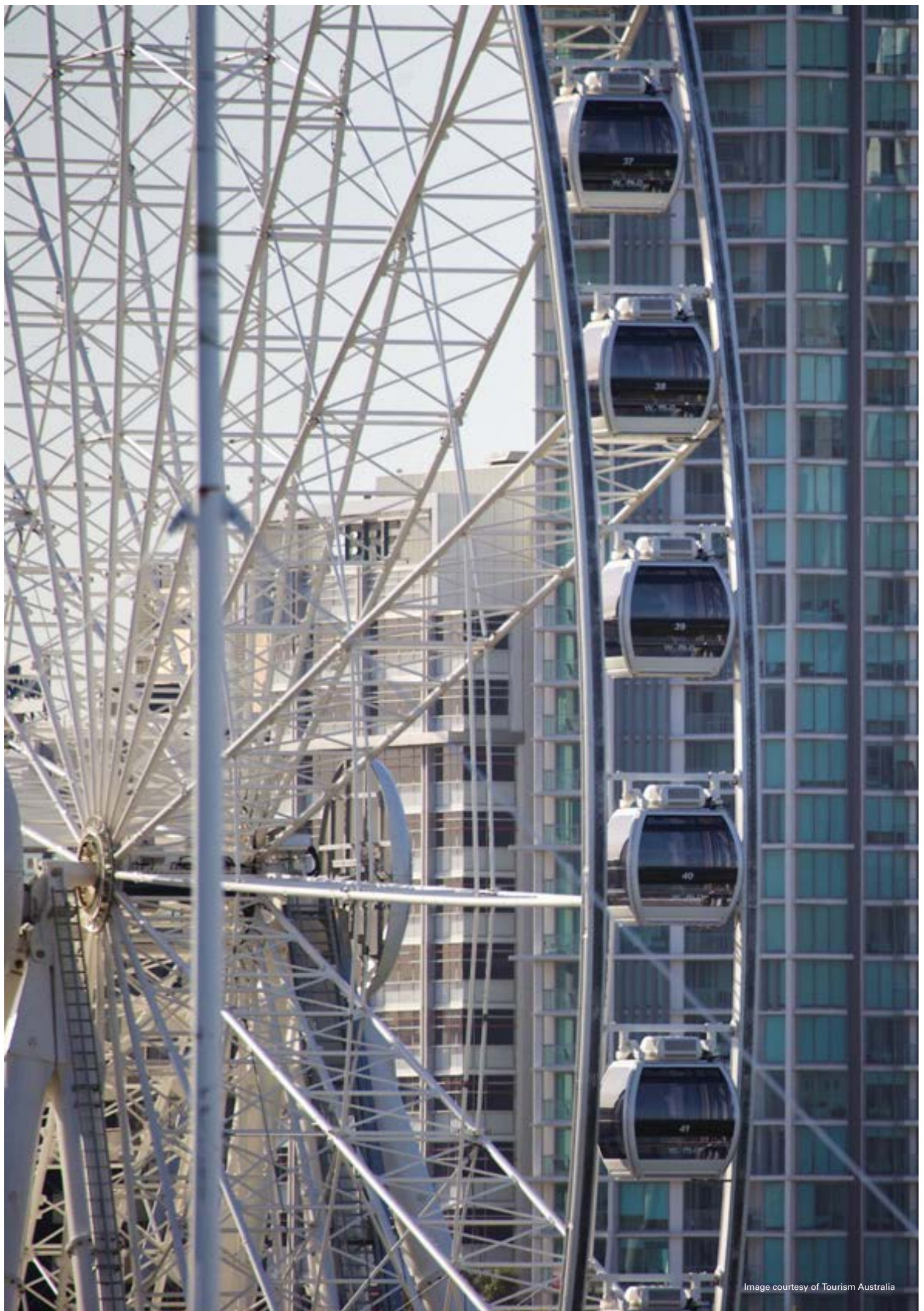
Demand for city accommodation, particularly from business travellers, has seen occupancy rates in Australia's capital cities reach record levels. With occupancy rates regularly exceeding 80 per cent in most major Australian cities¹³, CBD accommodation is commonly full Monday to Thursday.

A lack of room availability in major gateway capital cities results in lost leisure tourism business in regional areas. Visitors who cannot find suitably priced accommodation upon arrival in gateway cities often forego extensive travel dispersal due to cost, depriving surrounding regions of economic activity. Room capacity constraints also increase the cost and reduce the productivity of business travel.

While tourism property is a sound and viable property class, under-investment in accommodation will continue unless it can become a more competitive asset class when compared with commercial, retail and residential developments. This is the most critical infrastructure constraint on tourism growth.

Some innovative solutions to this issue are being canvassed, including relaxing planning restrictions for mixed-use developments, floor space ratio concessions, allowing the adaptive reuse of government-owned buildings at reduced rents and releasing Crown land for tourism purposes.

¹³ Capital City Accommodation Index, Tourism & Transport Forum, 2011 based on data from the Survey of Tourist Accommodation, cat. 8635.0, Australian Bureau of Statistics, 2011



TOURISM INFRASTRUCTURE CHALLENGES

Given the significant contribution tourism demand drivers and supporting visitor infrastructure make to the economy, there is a need to ensure appropriate investment in visitor infrastructure. However, there is often an under-investment in tourism infrastructure as it forms part of a larger supply chain that is rarely looked at in its totality by government, in particular destination and precinct planners.

TOURISM AS A SECONDARY USER

When planning investment in nationally significant infrastructure, tourism is rarely considered a primary user of the infrastructure. This is particularly the case for road and transport infrastructure, precinct planning and CBD land-use zoning. Failure to recognise the needs of different groups, such as visitors, and how they use transport and precinct infrastructure, can result in a disjointed visitor experience, or failure to capitalise on the significant money visitors are willing to spend while travelling.

PLANNING, APPROVAL AND REGULATORY BARRIERS

State and local statutory planning instruments can prevent tourism development by zoning land use only for residential, agricultural and environmental protection. There can be a failure to identify different types of tourism infrastructure that can complement development in a particular zone.

Widely varying zoning, building regulation, approval and enforcement practices by state and local governments create considerable uncertainty, particularly between residential and tourist accommodation. Development approval processes can be time-consuming and unpredictable. Due to the fragmented nature of tourism, many development proposals attract multiple federal and state agency concurrences, particularly nature-based tourism development or matters of heritage significance. Furthermore, local governments often lack the capacity to assess the broader external economic value of tourism to the region.

In the limited zones where tourism development is permitted, tourism usually competes with other land uses such as office development. Tourism is rarely the 'highest and best use' of available sites with developers commonly electing to invest in non-tourism development, which produces fewer and lesser positive externalities.

LACK OF CERTAINTY OF TOURISM MARKETING FUNDING

The private sector is unlikely to invest in significant demand-driving infrastructure or supporting visitor infrastructure if there is uncertainty around tourism marketing funding for the destination. Addressing market failure in tourism marketing by providing funding certainty for state tourism organisations

and Tourism Australia will facilitate private sector investment in tourism product and access, including new attractions and accommodation, additional airline capacity or increased visitor services. Furthermore, tourism marketing funding must be prioritised based on destinations that capture the greatest share of visitor expenditure.

UNTARGETED GOVERNMENT FUNDING

The tourism industry is sometimes the recipient of government funding for infrastructure through portfolios as diverse as regional development, transport, environment, heritage, arts, and sport and recreation. However, this funding is rarely coordinated across government portfolios or specifically targeted at addressing the needs of the visitor economy. As a result, investment rarely meets the needs of priority destination supply chains. It therefore fails to maximise the return on public or private sector investment.

A coordinated, whole-of-government approach to destination development, such as the Australia's National Landscapes program (see case study over), will ensure money is spent on strategic priorities which deliver the greatest return on investment, maximise the contribution to the visitor economy, and sustain and create employment opportunities. A coordinated approach will also leverage greater private sector investment and foster partnerships between industry and government.



Image courtesy of Tourism Australia

PRIORITISING INVESTMENT IN TOURISM INFRASTRUCTURE: A CO-ORDINATED APPROACH

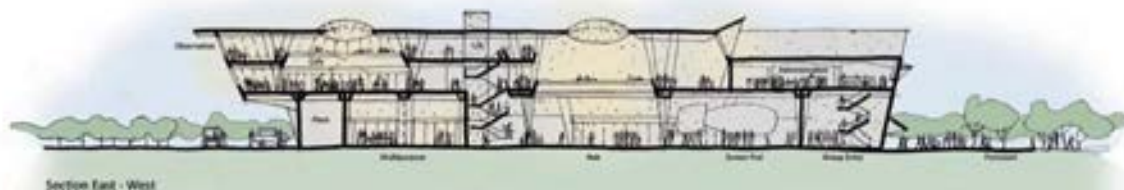
Australia's National Landscapes Program

The current political nature of tourism marketing funding in Australia often means destination promotion is not targeted or prioritised using the same commercial and economic rationale as the private sector. This often results in disparate messaging about destinations.

Australia's National Landscapes Program, developed by Tourism Australia and Parks Australia, provides a best-practice example of destination development, industry cooperation and tourism promotion in Australia. Aimed at promoting the best of Australia's nature-based tourism experiences to international visitors, the program has evolved to focus on delivering iconic visitor experiences in nature through appropriate development of destination infrastructure. Experience Development Strategies and branding strategies are developed by each destination to guide infrastructure development and visitor experiences based on the unique attributes of each landscape. Of the twenty most economically significant tourism regions identified in TTF's analysis, 15 are part of the National Landscapes Program (See Table 3 opposite).



PRIORITY REGIONAL INFRASTRUCTURE: LOCH ARD INTERPRETIVE CENTRE



Victoria's Great Ocean Road is the third most popular natural attraction in Australia¹⁴. The visitor appeal of the Great Ocean Road is recognised through its inclusion in Australia's National Landscape Program. The region is highly dependent on tourism for economic development and employment, with the sector supporting over 3,500 jobs in the region. The 12 Apostles including Loch Ard attract over 1.4 million visitors a year, with two thirds of visitors to the region being non-Victorians. This number is predicted to grow to 3.2 million by 2025¹⁵.

Yet research indicates that international visitors spend only one day out of an average 34 day trip in the Great Ocean Road region¹⁶. Industry has identified a need to increase length of stay of visitors to the region by providing more to see and do. Aging infrastructure, lack of signature interpretive facilities, poor visitor amenity and access to accommodation all affect visitors' perception of the destination.

The development of the Loch Ard Interpretive Centre, similar to the Canyon Views in the USA or the Icefields Centre in Canada, will provide an additional 'must see' visitor attraction in the region. The facility will feature state-of-the-art interactive interpretation facilities, viewing

platforms and hospitality services, encouraging visitors to extend their stay.

The project has been identified as a key infrastructure priority in the Nature Based Tourism Investment Case prepared by Parks Victoria and in a variety of regional reports, including the Great Ocean Road Destination Management Plan and National Landscape Heritage Project, based on the contribution this investment would make to the regional economy. The project is expected to generate an additional \$217 million in gross regional product, contribute 25,000 visitor nights to the region by 2020, and create an additional 225 jobs in the region¹⁷.



¹⁴ Parks Victoria, A landmark project in South West Victoria, 2011

¹⁵ Ibid

¹⁶ Ibid

¹⁷ Ibid

ADDRESSING TOURISM INFRASTRUCTURE PRIORITIES

Public and private sector investment in tourism infrastructure should be prioritised in key tourism regions that make a significant contribution to the Australian economy and/or to their regional economies. Prioritising investment in this way ensures the greatest return and helps support sustainable visitor economies. Table 3 lists twenty Australian destinations by tourism expenditure, with tourism infrastructure priorities for each destination set out on the subsequent pages.

TABLE 3. PRIORITY TOURISM DESTINATIONS

OUTPUT RANK	REGION	STATE	TOURISM OUTPUT (\$M)	SHARE OF LOCAL ECONOMY	INTERNATIONAL VISITOR EXPENDITURE (\$M)
1	Sydney	NSW	\$11,057	2.4%	\$5,788
2	Melbourne & surrounds	VIC	\$8,708	2.3%	\$3,923
3	Perth & surrounds	WA	\$4,276	1.9%	\$1,811
4	Brisbane & surrounds	QLD	\$4,144	2.0%	\$1,454
5	NSW North Coast	NSW	\$3,621	6.9%	\$182
6	Gold Coast	QLD	\$3,319	6.4%	\$822
7	Tropical North Queensland	QLD	\$3,126	7.1%	\$954
8	Sunshine & Fraser Coast	QLD	\$3,112	5.1%	\$362
9	The Capital & Australian Alps	ACT, NSW, VIC	\$2,763	3.6%	\$351
10	Adelaide & surrounds	SA	\$2,331	2.0%	\$662
11	Hunter & Central Coast	NSW	\$2,081	3.0%	\$190
12	South East Coast	NSW, VIC	\$2,077	5.7%	\$182
13	Eastern Victoria	VIC	\$1,618	2.4%	\$66
14	Tasmania	TAS	\$1,535	3.8%	\$257
15	Blue Mountains & surrounds	NSW	\$1,285	4.9%	\$26
16	Australia's West Coast	WA	\$899	6.1%	\$119
17	Western Victoria	VIC	\$893	5.5%	\$48
18	Darwin & Kakadu	NT	\$768	3.3%	\$158
19	The Red Centre	NT	\$487	10.6%	\$207
20	Flinders Ranges	SA	\$422	4.6%	–
Total Priority Regions			\$58,522	3.0%	\$17,562
Total Remaining Regions			\$4,025	3.5%	\$52
ALL REGIONS			\$62,547	3.0%	\$18,262

Methodology

Tourism regions are comprised of a number of Statistical Local Areas (SLAs) as defined by the ABS in consultation with state and territory tourism organisations. Priority destinations can include more than one tourism region, with tourism expenditure modelled by TRA and the economic importance of tourism determined based on TRA's methodology.

Destinations have been ranked by tourism expenditure, tourism's share of the local economy is a ratio between each region's tourism output, a derivative of tourism expenditure that excludes taxes and subsidies at point of sale, and the region's total economic output.

TOURISM INFRASTRUCTURE PRIORITIES BY REGION

PRIORITY 1: SYDNEY (NSW)



TOURISM REGIONS

Sydney

DESTINATION INFRASTRUCTURE

Convention and exhibition space

Construct the Sydney International Convention, Exhibition and Entertainment Precinct at Darling Harbour.
Upgrade exhibition facilities at Sydney Olympic Park.

City accommodation

Sustainably increase accommodation stock to meet market needs.

Parks and reserves facilities

Develop an iconic multi-day walk around Sydney Harbour.
Upgrade island jetties, signage, walking tracks, car parking and road access around Sydney Harbour.

Precinct development

Upgrade Centennial Parklands sporting precinct in eastern Sydney.
Provide performing arts space, function and event facilities at Wharf 2/3, Walsh Bay.
Redevelop Campbell's Cove forecourt to provide public amphitheatre and event space.

Visitor facilities

Redesign public spaces and ferry terminal at Circular Quay.
Complete Sydney CBD cycleway network including improved access to Moore Park and Centennial Parkland from Green Square.
Upgrade performing and theatre facilities at Sydney Opera House.

TRANSPORT INFRASTRUCTURE

Gateway airport

Increase Sydney Airport movement cap from 80 to 90 movements per hour.
Review slot management system and regional ring fence affecting Sydney Airport capacity.
Remove Airport Link station access fees.
Identify site for second Sydney Airport.

Cruise shipping facilities

Increase berthing capacity east of the Harbour Bridge to accommodate large super-liners, including shared use of Garden Island.

Ferry infrastructure

Further expand and develop high frequency Harbour Hopper ferry service to major harbour attractions from Manly, Milsons Point and Darling Harbour.
Upgrade wharf infrastructure on Shark Island, QStation and other locations around Sydney Harbour to accommodate regular ferry services.
Extend integrated ticketing offers to private ferry and cruise operators, as well as major CBD and harbour attractions

Major road infrastructure

Construct M4 East, F3 to M2 Link, F6 to Loftus Link and Military Road tunnel.
Duplicate M5 East.

Heliport infrastructure

Develop heliport facilities in the Sydney CBD.

Light rail infrastructure

Expand the light rail network to Moore Park and Randwick Racecourse.
Extend light rail to Walsh Bay and Barangaroo.

NATIONAL LANDSCAPE

Sydney Harbour – *progressing candidacy*

PRIORITY 2: MELBOURNE AND SURROUNDS (VIC)



TOURISM REGIONS

Melbourne and Geelong

DESTINATION INFRASTRUCTURE

Convention and exhibition space

Expand exhibition space at Melbourne Exhibition Centre.

City accommodation

Sustainably increase accommodation stock to meet market needs including boutique heritage hotel at Flinders Street station.

Visitor facilities

Develop mineral springs bath-house at Eastern Beach, Geelong.

TRANSPORT INFRASTRUCTURE

Major road infrastructure

Widen Tullamarine Freeway between Melbourne Airport and Melbourne CBD.

Dedicate bus lanes on Tullamarine Freeway for Skybus service.

Cruise shipping facilities

Upgrade Yarra Street Pier, Geelong.

Heavy rail infrastructure

Construct Melbourne Airport rail link.

Progress development of the Metro Rail project.

Marina infrastructure

Progress St Kilda Pier, ferry and precinct development.

Improve transport links including taxi and car parking infrastructure at Central Pier, Docklands.

PRIORITY 3: PERTH AND SURROUNDS (WA)



TOURISM REGIONS

Experience Perth and Australia's South West

DESTINATION INFRASTRUCTURE

Convention & exhibition space

Expand Perth Convention Centre.

City accommodation

Sustainably increase accommodation stock in Perth to meet market needs.

Develop affordable accommodation including caravan parks in major regional precincts.

Regional accommodation

Progress further hotel development in Albany, Fremantle and Rottnest Island.

Precinct development

Progress Scarborough Beach redevelopment including retail, hospitality and leisure facilities.

Visitor facilities

Complete multi-user 60,000 seat sporting stadium in Perth CBD.

TRANSPORT INFRASTRUCTURE

Gateway airport

Reserve railway station box as part of the Perth Airport terminal redevelopment including retail, hospitality and leisure facilities.

Complete Gateway WA project to link Perth CBD with Perth Airport.

Regional airport

Upgrade Busselton Regional Airport.

Rail infrastructure

Construct the Perth Airport rail link.

Light rail infrastructure

Construct a light rail link between Perth CBD and Scarborough Beach.

NATIONAL LANDSCAPE

Great South West Edge

PRIORITY 4: BRISBANE AND SURROUNDS (QLD)



TOURISM REGIONS

Brisbane and Darling Downs

DESTINATION INFRASTRUCTURE

City accommodation

Sustainably increase accommodation stock to meet market needs.

Precinct development

Develop visitor attraction and supporting public amenities at Southbank precinct.

Expand Mt Coot-tha tourism precinct opportunities.

Nature-based accommodation

Develop boutique, low-impact accommodation and tourism product on North Stradbroke and Moreton Bay Island.

Build indigenous whale watching and interpretive facility at Point Lookout (North Stradbroke).

Visitor facilities

Build additional performing arts space in the Brisbane CBD, including expanded facilities at the Queensland Museum.

TELECOMMUNICATIONS INFRASTRUCTURE

Ensure NBN reaches South Queensland islands with potential for beach Wi-Fi.

TRANSPORT INFRASTRUCTURE

Gateway airport

Construct parallel runway project at Brisbane Airport.

Improve bus services to Brisbane Airport terminals and Airport Village.

Cruise shipping facilities

Develop cruise facilities at Port of Brisbane, to the east of the Gateway Bridge.

Ferry infrastructure

Improve access infrastructure to Moreton Bay Island including terminal upgrades in Toondah Harbour and Dunwich.

Rail infrastructure

Complete Moreton Bay Rail Link.

Deliver Cross River Rail project to expand rail capacity throughout South East Queensland.

PRIORITY 5: NSW NORTH COAST (NSW)



TOURISM REGIONS

**Mid North Coast; Northern Rivers and New England
North West**

DESTINATION INFRASTRUCTURE

Parks and reserves facilities

Upgrade walking tracks and interpretation to allow for the development of multi-day guided experiences in national parks.

Visitor facilities

Redevelop cultural facilities/museum at the World Heritage Visitor Centre at Murwillumbah.

TRANSPORT INFRASTRUCTURE

Major road access

Upgrade Pacific Highway to dual carriageway along the Sydney to Brisbane corridor.

Construct the F3-M2 connection linking Sydney with Northern NSW.

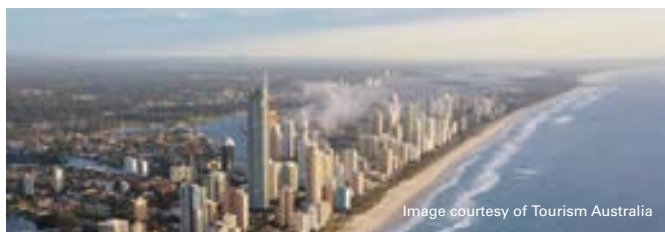
Rail infrastructure

Improve rail services and access along the Sydney to Brisbane corridor.

NATIONAL LANDSCAPE

Green Cauldron

PRIORITY 6: GOLD COAST (QLD)



TOURISM REGIONS

Gold Coast

DESTINATION INFRASTRUCTURE

Convention and exhibition space

Upgrade Gold Coast convention and exhibition facilities.

Precinct development

Develop Commonwealth Games and Gold Coast event infrastructure.

Upgrade Cavill Avenue mall.

Nature-based infrastructure

Expand nature-based tourism experiences in Gold Coast hinterland including cable car facilities.

Scuttle ship off the coast to develop dive attraction.

TRANSPORT INFRASTRUCTURE

Gateway airport

Construct ILS equipment at Gold Coast Airport.

Cruise shipping facilities

Commence dredging of Broadwater and Gold Coast waterways.

Develop supporting yacht and cruise shipping facilities at Broadwater.

Heavy rail infrastructure

Construct heavy rail services between Gold Coast Airport and existing line at Robina.

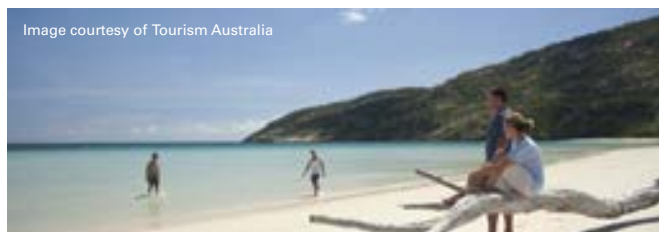
Light rail infrastructure

Construct light rail services between Gold Coast Airport and planned Phase 1 terminus at Broadbeach South.

NATIONAL LANDSCAPE

Green Cauldron

PRIORITY 7: TROPICAL NORTH QUEENSLAND (QLD)



TOURISM REGIONS

Tropical North Queensland; NorthA ern and Whitsundays

DESTINATION INFRASTRUCTURE

Convention and exhibition space

Upgrade existing convention and exhibition facilities.

Parks and reserves facilities

Develop eco-tourism experiences in White Mountains National Park and camping facilities at Cape York.

Precinct development

Further develop Townsville CBD and Strand precinct, complete the Port Douglas Waterfront Development and develop Cairns Cultural precinct.

Nature-based infrastructure

Progress the Eungella Edge Eco-Lodge conference and visitor complex development.

Develop Airlie Beach marine discovery centre and Jonah Beach Eco-safari camp.

Visitor facilities

Upgrade medical facilities on Hamilton Island for Whitsunday region.

TRANSPORT INFRASTRUCTURE

Gateway airport

Upgrade Prosperpine Airport runway surface and length.

Provide bus services between Cairns Airport and Cairns CBD.

Cruise shipping facilities

Upgrade Townsville Cruise Terminal, including dredging to accommodate larger vessels. Improve portside access to Cairns Cruise Terminal through dredging Trinity Inlet.

Major road infrastructure

Complete all-weather road upgrades to Bruce Highway.

Continue upgrades to Cook Highway and Peninsula Development Road.

Upgrade Shute Harbour Road.

Marine infrastructure

Develop super yacht facilities and upgrade reef and island marina facilities including Clump Port and Dunk Island jetties.

NATIONAL LANDSCAPE

Great Barrier Reef

PRIORITY 8: SUNSHINE AND FRASER COAST (QLD)



TOURISM REGIONS

Sunshine Coast; Central Queensland; Fraser Coast and Bundaberg

DESTINATION INFRASTRUCTURE

Precinct development

Progress Sunshine Coast Hinterland nature-based tourism precinct projects including the Maryborough historic and cultural precinct.

Visitor facilities

Upgrade Fraser Island visitor facilities.

Develop Hervey Bay Marina Biodiversity Centre.

TRANSPORT INFRASTRUCTURE

Gateway airport

Expand Sunshine Coast Airport infrastructure to allow for permanent international services.

Major road infrastructure

Upgrade Bruce Highway between Brisbane and Hervey Bay.

Upgrade key regional roads on Sunshine Coast.

Improve transport connectivity on Sunshine Coast.

PRIORITY 9: THE CAPITAL AND AUSTRALIAN ALPS (ACT/NSW/VIC)



TOURISM REGIONS

Canberra (ACT); Snowy Mountains (NSW); High Country (VIC); Riverina (NSW) and Capital Country

DESTINATION INFRASTRUCTURE

Precinct development

Develop biking, gondola and accommodation facilities at Stromlo Forest Park.

Nature-based infrastructure

Develop the Falls Creek Altitude Training and Wellness Facility.

Construct the Falls to Hotham Alpine Crossing walking trail with associated eco-lodge accommodation.

Improve cross-tenure access for walking, kayaking, fishing and mountain biking activities in the Australian Alps.

Visitor facilities

Develop the Smithsonian National Air and Space Museum at Stromlo.

Implement the Mt Buller Resort Masterplan including upgrade to water storage facilities, the Horse Hill gondola and year-round visitor experiences.

Expand ski field at Mt Hotham to Eagle Ridge.

Integrate Snowy River shared pathway linking bicycle, walking and canoe trails.

TRANSPORT INFRASTRUCTURE

Regional airport

Expand Albury (NSW) Airport and supporting transfer links.

Rail infrastructure

Build high speed rail link from Brisbane to Melbourne via Sydney and Canberra.

Improve transfer and rail links from Melbourne to the Victorian Alps.

Light rail infrastructure

Begin planning for light rail network between Canberra City, Canberra Airport and Queanbeyan.

Major road infrastructure

Provide additional lanes on key roads between Canberra Airport/Civic/Parliamentary Triangle.

Create the Mt Buller-Mt Stirling link road.

NATIONAL LANDSCAPE

Australian Alps

PRIORITY 10: ADELAIDE AND SURROUNDS (SA)



TOURISM REGIONS

Adelaide; Fleurieu Peninsula; Yorke Peninsula and Kangaroo Island

DESTINATION INFRASTRUCTURE

Convention and exhibition space

Progress stage 2 of the Adelaide Convention Centre expansion.

City accommodation

Sustainably increase accommodation stock to meet market needs.

Regional accommodation

Increase range of accommodation stock on Kangaroo Island including niche properties.

Upgrade existing regional accommodation to meet market demands.

Parks and reserves facilities

Improve trail and visitor facilities at Kelly Hill Conservation Park and Seal Bay Conservation Park.

Precinct development

Develop Adelaide Riverbank Precinct including Adelaide Oval redevelopment and Elder Park footbridge.

Upgrade Victor Harbor town precinct.

TRANSPORT INFRASTRUCTURE

Regional airport

Lengthen and strengthen tarmac at Kangaroo Island Airport.

Light rail infrastructure

Extend light rail services to Adelaide Airport.

Ferry infrastructure

Complete upgrade of ferry terminal upgrade at Penneshaw, Kangaroo Island.

NATIONAL LANDSCAPE

Kangaroo Island

PRIORITY 11: HUNTER AND CENTRAL COAST (NSW)



Image courtesy of Tourism Australia

TOURISM REGIONS

Hunter and Central Coast

DESTINATION INFRASTRUCTURE

Convention and exhibition space

Build a 1000 seat conference centre in the Hunter Valley.

Precinct development

Progress precinct development projects on the Central Coast including the landing at Gosford and Entrance revitalisation project.

TRANSPORT INFRASTRUCTURE

Regional airport

Approve international services to operate out of Newcastle Airport.

Major road infrastructure

Upgrade Golden Highway, linking the Hunter Valley and Outback NSW.

Seal arterial roads and improve transport links between Hunter Valley vineyards and Newcastle Airport.

Increase capacity of major roads between the F3 and Newcastle Airport.

Rail infrastructure

Build high speed rail link from Brisbane to Melbourne via Sydney and Canberra.

PRIORITY 12: SOUTH EAST COAST (NSW/VIC)



TOURISM REGIONS

South Coast (NSW) and Lakes (VIC)

DESTINATION INFRASTRUCTURE

Nature-based accommodation

Improve visitor experiences and accommodation offering along Light to Light walking track and Green Cape Lightstation in Ben Boyd National Park.

Parks and reserves facilities

Develop a series of walking trails and multi-day walks including the Coastal Wilderness Walk (Cape Conran to Mallacoota), Merimbula to Eden and within Croajingolong and Ben Boyd National Park.

Precinct development

Further develop commercial opportunities at Cape Conran and Point Hicks precincts.

TRANSPORT INFRASTRUCTURE

Major road access

Complete northern section of the F6 Freeway.

Marine infrastructure

Construct wharf on southern side of Twofold Bay to access Light to Light walk.

Construct Mallacoota Ocean access facility to cater for high-yield fishing experiences.

Develop/improve boating infrastructure on Gippsland Lakes.

NATIONAL LANDSCAPE

Australia's Coastal Wilderness

PRIORITY 13: EASTERN VICTORIA (VIC)



TOURISM REGIONS

Peninsula; Gippsland; Phillip Island and Melbourne East

DESTINATION INFRASTRUCTURE

Parks and reserves facilities

Facilitate adaptive re-use of the former Point Nepean Quarantine Station including visitor facilities and accommodation.

Upgrade visitor infrastructure including quality accommodation at Wilsons Promontory National Park.

Visitor facilities

Commence visitor experience upgrades at Phillip Island Nature Park and Puffing Billy Railway.

Develop an eco-resort at the gateway to the Wilsons Promontory National Park.

Develop dedicated conference facilities in Gippsland for niche events.

Develop hotel accommodation with conference facilities to complement food and wine product at Mornington Peninsula and Yarra Valley.

TRANSPORT INFRASTRUCTURE

Marine infrastructure

Develop Cowes Stony Point Ferry infrastructure.

Construct eco-boat infrastructure at Tidal River, Wilsons Promontory National Park.

PRIORITY 14: TASMANIA (TAS)



TOURISM REGIONS

Hobart & surrounds; Launceston and Tamar Valley; North West; East Coast; Southern West Coast and Northern

DESTINATION INFRASTRUCTURE

City accommodation

Sustainably increase accommodation stock in and around Hobart to meet market needs including adaptive re-use of heritage buildings.

Parks and reserves facilities

Upgrade Cradle Mountain Visitor Centre.

Repair South Coast Track within Southwest National Park.

Maintain and upgrade infrastructure in Walls of Jerusalem National Park.

Precinct development

Develop Hobart Waterfront precinct including function and accommodation facilities.

Maintain and upgrade Highfield Historic site.

TELECOMMUNICATIONS INFRASTRUCTURE

Expand telecommunication network and increase online access and mobile phone coverage.

TRANSPORT INFRASTRUCTURE

Gateway airport

Construct a cold storage facility and controlled temperature logistics chain at Hobart Airport.

Regional airport

Upgrade Devonport and St Helens Airport.

Cruise shipping facilities

Upgrade Hobart cruise ship terminal.

Marine infrastructure

Upgrade Darlington Jetty at Maria Island National Park.

Major road infrastructure

Upgrade and improve Cape Tourville and Hastings road infrastructure and supporting walkways.

NATIONAL LANDSCAPE

Tasmania – Progressing candidacy

PRIORITY 15: BLUE MOUNTAINS AND SURROUNDS (NSW)



TOURISM REGIONS

Central NSW and Blue Mountains

DESTINATION INFRASTRUCTURE

Parks and reserves facilities

Upgrade signage, walking tracks, car parking and road access in Blue Mountains National Park.

Nature-based accommodation

Upgrade Jenolan Caves House and develop associated multi-day visitor experiences.

Visitor infrastructure

Upgrade electricity, sewerage and storm water infrastructure.

TRANSPORT INFRASTRUCTURE

Major road access

Improve local link roads to major tourism precincts divided by Great Western Highway.

NATIONAL LANDSCAPE

Greater Blue Mountains

PRIORITY 16: AUSTRALIA'S WEST COAST (WA)

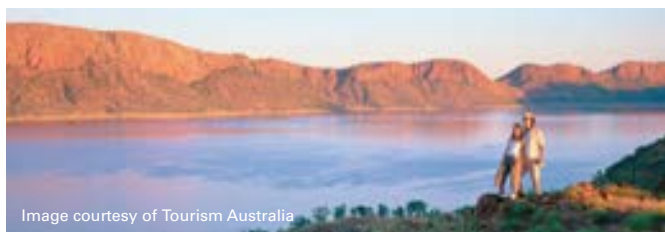


Image courtesy of Tourism Australia

TOURISM REGIONS

Australia's North West and Australia's Coral Coast

DESTINATION INFRASTRUCTURE

Regional accommodation

Develop affordable accommodation in Broome, Karratha and Tom Price.

Develop worker accommodation in Coral Bay.

Parks and reserves facilities

Develop eco-tourism offering at Mt Augustus and Ningaloo Coast.

Visitor facilities

Develop indigenous tours in Kimberley region.

TRANSPORT INFRASTRUCTURE

Gateway airport

Upgrade Broome International Airport terminal to allow for permanent international services.

Marine infrastructure

Expand Broome Pier to accommodate larger cruise ships.

Establish permanent customs and immigration facilities at the port of Broome for international cruise ships.

Construct marina infrastructure at Exmouth to allow cruise ships to berth offshore.

NATIONAL LANDSCAPE

Ningaloo – Shark Bay and Kimberley

PRIORITY 17: WESTERN VICTORIA (VIC)



TOURISM REGIONS

Western and Western Grampians

DESTINATION INFRASTRUCTURE

Regional accommodation

Develop boutique accommodation along the Great Ocean Road and nature-based walking trails.

Develop major resort facility on Great Ocean Road in the Port Campbell precinct.

Develop internationally-branded accommodation at Sovereign Hill.

Parks and reserves facilities

Improve visitor facilities at the Twelve Apostles and develop the Loch Ard Interpretive Centre.

Complete the Great Ocean Walk and the Grampians Peak Trail. Provide quality visitor infrastructure to cater for international and interstate visitors.

Develop Budj Bim National Heritage Landscape including Lake Condah Aboriginal interpretive experience.

Precinct development

Redevelop Apollo Bay Harbour into a tourism precinct.

TRANSPORT INFRASTRUCTURE

Major road infrastructure

Upgrade Great Ocean Road to meet forecast visitor demand.

Marine infrastructure

Build eco-boat infrastructure on jetty at Port Campbell National Park.

NATIONAL LANDSCAPE

Great Ocean Road

PRIORITY 18: DARWIN AND KAKADU (NT)



TOURISM REGIONS

Darwin and Top End

DESTINATION INFRASTRUCTURE

City accommodation

Sustainably increase accommodation stock in Darwin.

Regional accommodation

Improve quality of accommodation in Katherine.

Nature-based accommodation

Develop sustainable nature-based accommodation in national parks, on Crown Land or aboriginal land including Litchfield and Kakadu National Park.

Extend electricity grid to accommodation at Jim Jim Falls to reduce dependence on self-generated power.

Parks and reserves facilities

Develop commercial tourism opportunities, including interactive nature-based, cultural and adventure activities in Litchfield National Park.

Upgrade visitor facilities in national parks including the Nourlangie day-use area and extend walking tracks in Kakadu National Park.

Visitor facilities

Develop indigenous interpretive experiences in and around key national parks.

TRANSPORT INFRASTRUCTURE

Major airport

Improve bus services between Darwin airport and Darwin CBD.

Regional airport

Improve airstrip facilities at Jabiru.

Major road infrastructure

Upgrade all-weather road access to and within Kakadu National Park including Garnamarr, Twin Falls and Jim Jim Falls visitor destinations.

Marine infrastructure

Develop marina at Darwin Waterfront.

Develop berthing and mooring arrangements for commercial tour vessels in Darwin harbour.

Light rail infrastructure

Plan for the development of light rail services in Darwin CBD to Darwin airport.

NATIONAL LANDSCAPE

Australia's Timeless North

PRIORITY 19: THE RED CENTRE (NT)



TOURISM REGIONS

Central and Alice Springs

DESTINATION INFRASTRUCTURE

City accommodation

Improve quality of accommodation in Alice Springs.

Regional accommodation

Develop low impact eco accommodation stock in key regional areas along the Red Centre Way including West MacDonnell/Finke Gorge National Parks.

Parks and reserves facilities

Upgrade visitor facilities at sunset viewing area in Uluru-Kata Tjuta National Park.

Establish interactive nature-based, cultural and adventure activities including mountain bike trails in appropriate areas of national parks.

Visitor facilities

Develop a National Indigenous Centre providing visitor and cultural interpretation.

TRANSPORT INFRASTRUCTURE

Major road access

Seal remainder of the Red Centre Way road.

NATIONAL LANDSCAPE

Red Centre

PRIORITY 20: THE FLINDERS RANGES (SA)



TOURISM REGIONS

Eyre Peninsula; Flinders Rangers and Outback SA

DESTINATION INFRASTRUCTURE

Parks and reserves facilities

Upgrade walking tracks and develop National Landscape interpretive installations, especially in Brachina Gorge.

TELECOMMUNICATIONS INFRASTRUCTURE

Expand telecommunications network and online access.

TRANSPORT INFRASTRUCTURE

Regional airport

Expand runways at Port Lincoln and Port Augusta airports and upgrade terminal at Port Augusta.

Improve aerial facilities at supporting regional airstrips including Hawker, Leigh Creek and Balcanoona.

Major road access:

Seal key sections of the Flinders Rangers Touring Route: 6kms of Arkaroola–Balcanoona road and Blinman–Parachilna road.

NATIONAL LANDSCAPE

Flinders Ranges



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