

AUSTRALIAN CAPITAL TERRITORY BUDGET 2015-16

Submission to the ACT Government

OCTOBER 2014



Tourism & Transport Forum

Tourism & Transport Forum (TTF) is a national, member-funded CEO forum, advocating the public policy interests of leading corporations and institutions in the Australian tourism, transport and investment sectors.

For further information please contact:

Justin Koek | Deputy Director, Tourism 02 9240 2026 | jkoek@tff.org.au

Ashleigh Cormack | Tourism Policy Officer 02 9240 2027 | acormack@tff.org.au



Contents

EXECUTIVE SUMMARY	4
RECOMMENDATIONS	5
BACKGROUND	6
1. The economic impact of tourism	6
2. Towards Tourism 2020	6
3. Tourism trends in the ACT	8
GROWING DEMAND FOR TRAVEL TO THE TERRITORY	11
1. Promoting the Australian Capital Territory	11
a. Visit Canberra	11
b. Major events calendar and business events	12
BOOSTING VISITOR ECONOMY INVESTMENT	14
1. City to the Lake project	14
a. New Civic stadium	14
b. New convention and exhibition centre	15
IMPROVING THE VISITOR EXPERIENCE	16
1. Aviation and visitor transport	16
a. International air services	16
b. Franchising of public transport services	18
c. Capital Metro	18
d. Rental car regulation harmonisation	19
2. Enhancing Canberra's retail experience	20
a. Tourist Refund Scheme	20

Executive Summary

Tourism is a key component of the Australian Capital Territory (ACT) economy, supporting 17,000 jobs and contributing \$1.8 billion to Gross Territory Product (GTP)¹. Consumption by international and domestic visitors drives economic activity, export earnings and employment in metropolitan and regional ACT. Appropriately supported and strengthened, the tourism industry can serve as an economic development strategy.

The ACT tourism industry, through the *2020 Tourism Strategy*, has set out an ambitious plan to grow the value of overnight visitor expenditure from the 2013 base of \$1.58 billion to \$2.5 billion in 2020². Significant momentum has been gained through major events such as the 2013 Centenary of Canberra celebrations and upcoming Anzac Centenary. These events have profiled the territory as a vibrant, historic and diverse destination. To reach the \$2.5 billion stretch goal, a strong focus is needed on destination marketing, event acquisition, international airline attraction and infrastructure investment.

The ACT is home to some of Australia's best food and wine experiences, cultural and sporting events, and iconic national attractions. Through effective destination branding and development of major events, the Territory can leverage these assets to support growth in the visitor economy, particularly from international tourism markets in New Zealand, Singapore and China. Two of these markets are currently being targeted for direct international flights. Increasing high-yielding international visitors will be crucial to the ACT achieving its 2020 targets. As the headquarters of the federal border agencies, Canberra has the opportunity to lead the country as the pilot site for a new lightweight clearance model.

Infrastructure investment is critical to attracting new visitors, improving the visitor experience and increasing visitor yield. TTF recognises that the current funding climate in the ACT is challenging and there are competing priorities. However, withdrawing funds which would have progressed the planning of the City to the Lake development, new Civic stadium and new national convention centre will have a detrimental effect on the tourism industry. Planning for these projects should continue in recognition of the broader economic benefits their completion will bring to the territory economy.

This submission will demonstrate the essential role tourism plays in supporting the broader ACT economy and the importance of government support for the sector to achieve the 2020 target.

¹ Tourism Research Australia (2014), State Tourism Satellite Account (2013-14)

² 2020 Tourism Strategy – Growing the visitor economy 2014-2020 (2013)

Recommendations

RECOMMENDATIONS

Growing demand for travel to the Australian Capital Territory

Increase funding for Visit Canberra

- Increase funding for Visit Canberra by ten per cent in real terms over forward estimates

Increase funding for Territory Venues and Events

- Increase funding for Territory Venues and Events by ten per cent in real terms over forward estimates

Special Event Fund

- Continue the Special Event Fund initiative which allows the territory to attract demand-driving events

Leverage value of the international business event markets

- Recognise the important role of the Canberra Convention Bureau in attracting strategic international markets in New Zealand and Singapore, creating consumer demand for direct international flights

Boosting visitor economy investment

Support active visitor precincts

- Allocate resources to progress planning of the City to the Lake development to an investment-ready stage
- In the interim, maximise existing facilities to ensure ACT's reputation as a major sporting and business event destination is maintained

Improving the visitor experience

Attract international air services

- Continue funding the ACT's international marketing campaign to support new direct international flights into Canberra
- Encourage the federal government to establish Canberra Airport as the pilot site for a lightweight border agency clearance model
- ACT Government to fund pilot phase of lightweight, integrated border agency clearance model for international services

Improve public transport services

- Consider options for franchising ACTION buses to improve the customer experience and reduce costs
- Build stage 1 of Capital Metro in partnership with the private sector
- Continue planning for further light rail network extensions

Improve rental car regulation harmonisation

- Engage the federal government to harmonise state and territory taxes and regulation for the rental vehicle sector.

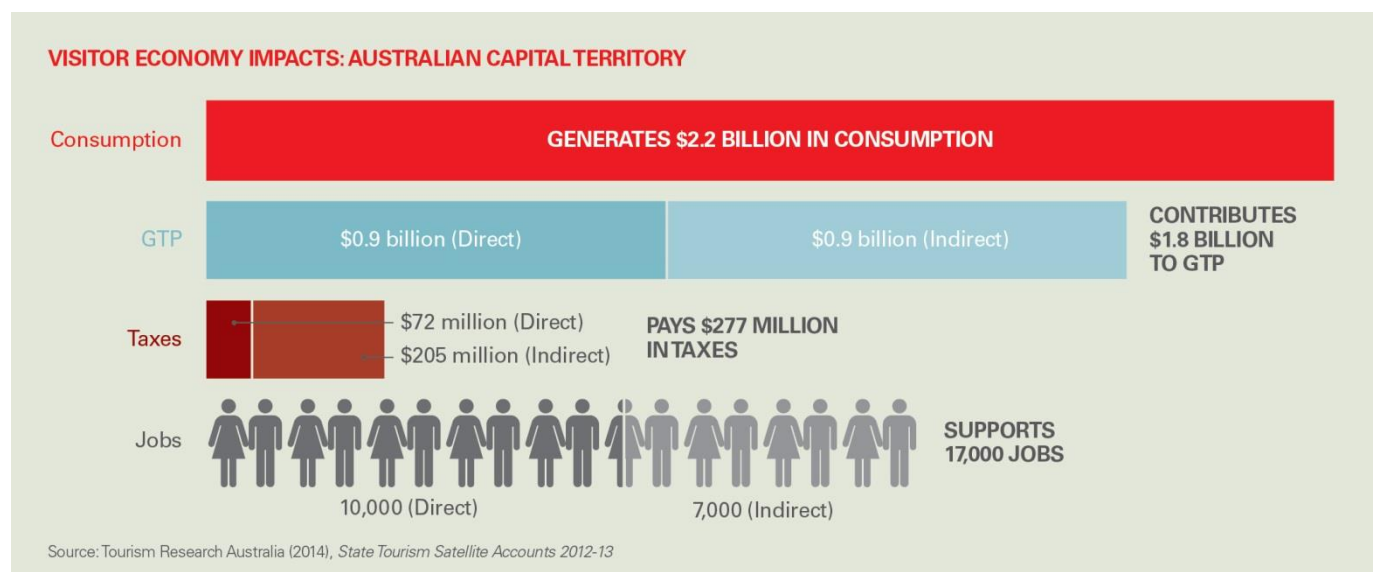
Enhancing the visitor retail experience

- ACT Treasury to support reform of the TRS scheme as being considered by the GST administration sub-committee

The visitor economy is critical to the Australian Capital Territory

1. The economic impact of tourism

- **\$2.2 billion** – Tourism consumption in the Australian Capital Territory totalled \$2.2 billion in 2012-13
- **\$4.6 million** – Spending by Australian and international visitors in the ACT averages \$4.6 million each day
- **\$1.8 billion** – Tourism's contribution to the ACT's gross territory product (GTP) includes \$852 million in direct GTP and another \$943 million in flow-on indirect GTP, representing a 5.1% share of the ACT economy
- **17,000** – Tourism consumption generates 10,000 direct ACT jobs and indirectly supports another 7,000, representing nearly 1 in every 12 jobs across the territory
- **\$277 million** – Tax revenue generated by visitor expenditure in the Australian Capital Territory
- **\$1960** – The amount each ACT household would pay in additional taxes without the tax revenue generated by tourism



2. Towards Tourism 2020

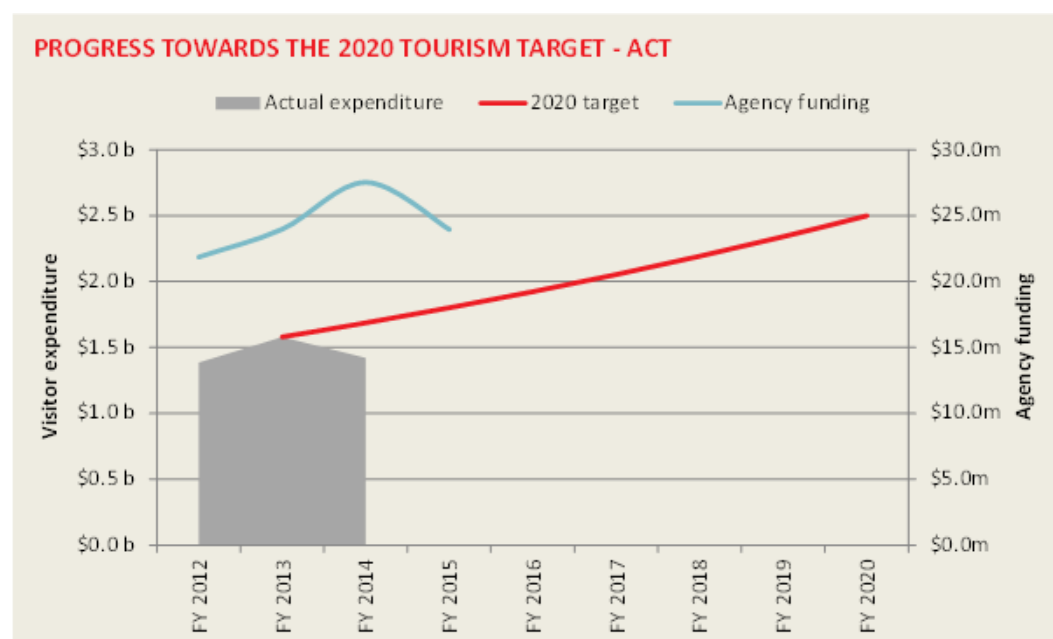
In 2009, federal, state and territory tourism ministers endorsed a goal for Australian tourism to increase overnight visitor expenditure from \$70 billion in 2009 to up to \$140 billion in 2020³.

The ACT government has announced, in its 2020 Tourism Strategy, corresponding plans to grow the value of overnight visitor expenditure from a 2013 base of \$1.58 billion to \$2.5 billion in 2020. The industry strongly

³ Tourism Australia / Department of Resources, Energy and Tourism (2010), *2020 Tourism Industry Potential*

supports the development of this strategy to guide growth in the visitor economy and leverage opportunities for public-private partnerships in international airline attraction and infrastructure investment.

However, territory's performance in the year ending June 2014 has seen a 10.0 per cent decline in this measure, driven by softness in the international business and education segments and a downturn in the territory's significant domestic overnight visiting friends and relatives (VFR) segment. In particular, industry is concerned by declining visitation from key Asian markets that have exhibited strong growth in other jurisdictions.



A critical component of the 2020 strategy is increasing aviation capacity, in particular from high-yield international markets, to boost and diversify the visitation base for the ACT. Of potential aviation links, New Zealand and Singapore stand out as viable hubs to introduce direct international services.

The ACT currently welcomes some 16,000 visitors from New Zealand each year, with average trip lengths of 13 nights in Australia and average spend of \$2,100 per trip⁵ – improving access holds tremendous potential to stimulate this mature market, given its propensity for repeat visitation for both business and leisure.

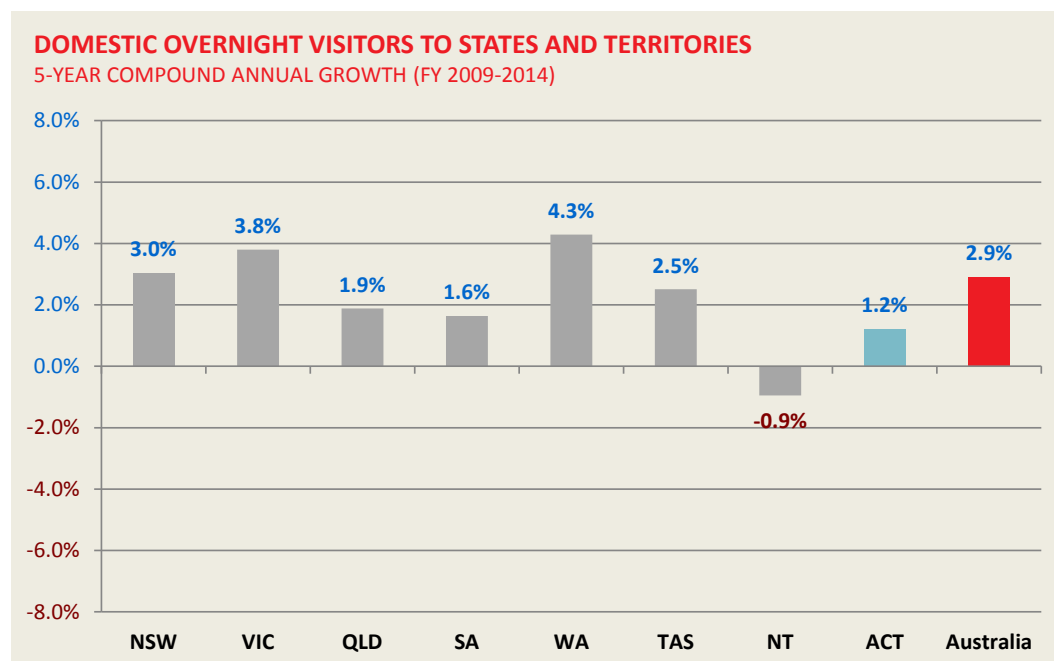
Similarly, some 6,000 residents of Singapore currently visit the ACT each year, spending 15 nights and \$3,400 per trip to Australia. Australia has seen sustained growth from this market, with visitation up 8.7 per cent in FY 2014 and forecast to sustain average growth of 6.0 per cent per annum in the decade to FY 2023⁶.

⁵ TTF analysis of Tourism Research Australia (2014), International Visitor Survey, June quarter 2014

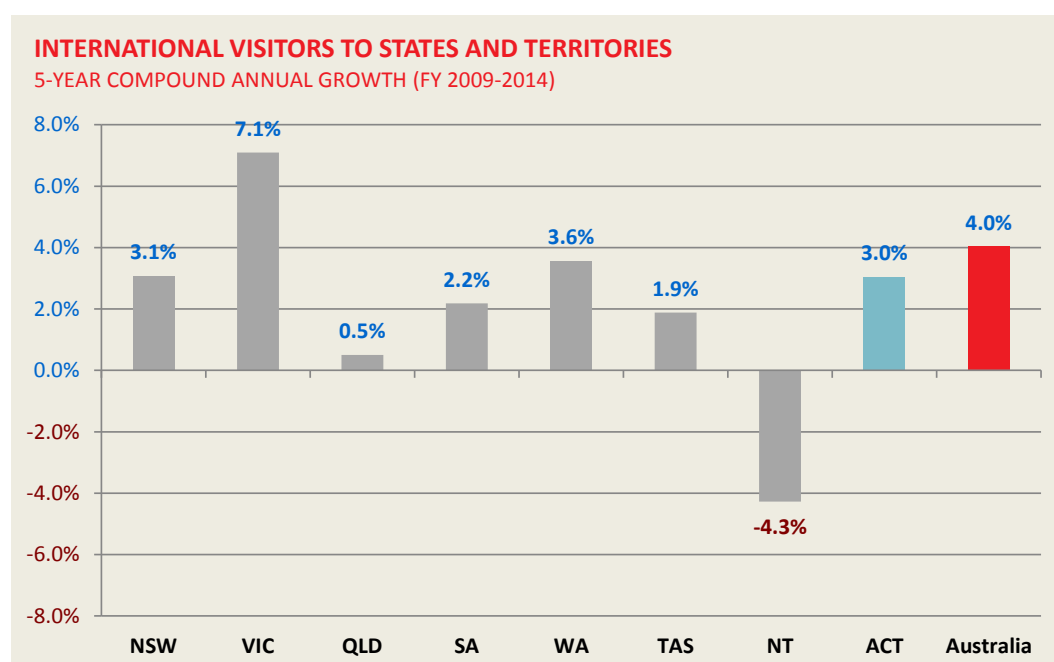
⁶ Tourism Research Australia (2014), Tourism Forecast, Autumn 2014

3. Tourism trends in the ACT

Tourism in the ACT has not kept pace with growth around the country in recent years. Domestic overnight travel, which still represents the bulk of the territory tourism industry by visitor expenditure, has increased at an average rate of 1.2 per cent per annum in the five years ending June 2014, behind national average growth of 2.9 per cent per annum. This places the territory in second last place for performance over this period – only ahead of the NT.

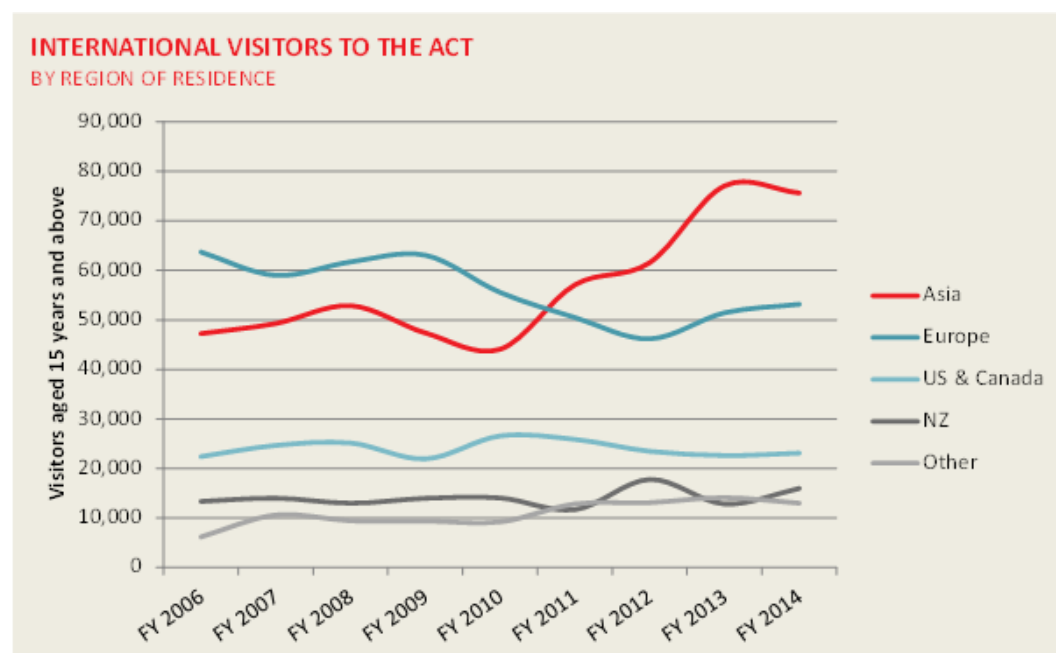


The ACT has also fallen behind national average growth of 4.0 per cent in international visitor arrivals over the same period, recording average growth of only 3.0 per cent per annum. While this is a stronger result than many other jurisdictions around the country, it is less than half the gains made by Victoria in attracting international visitors over the past five years, demonstrating potential to capture a greater share of demand.

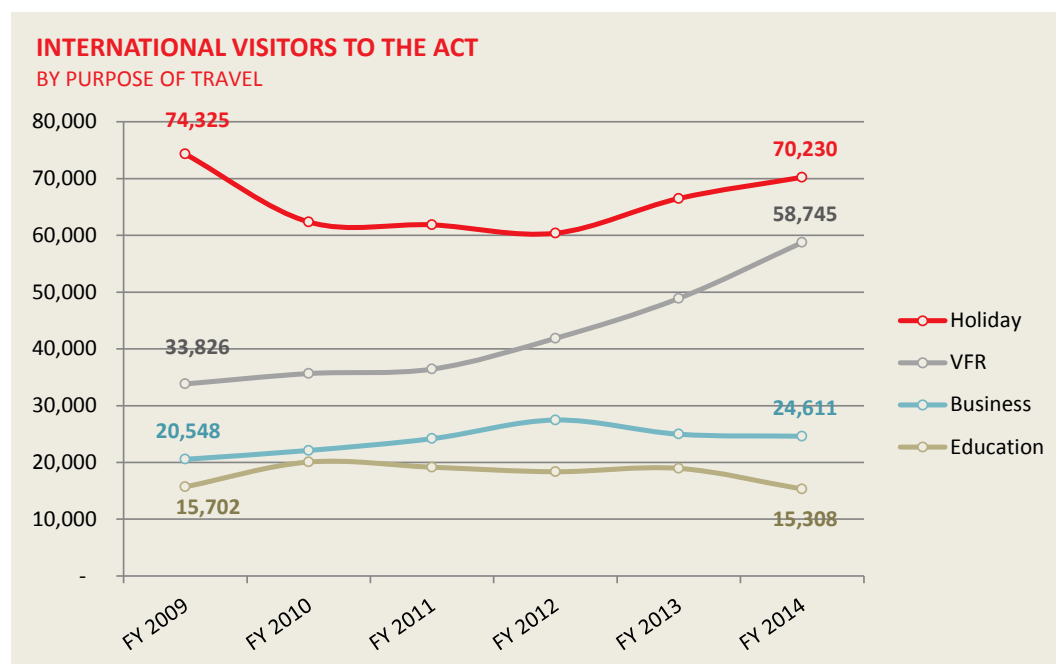
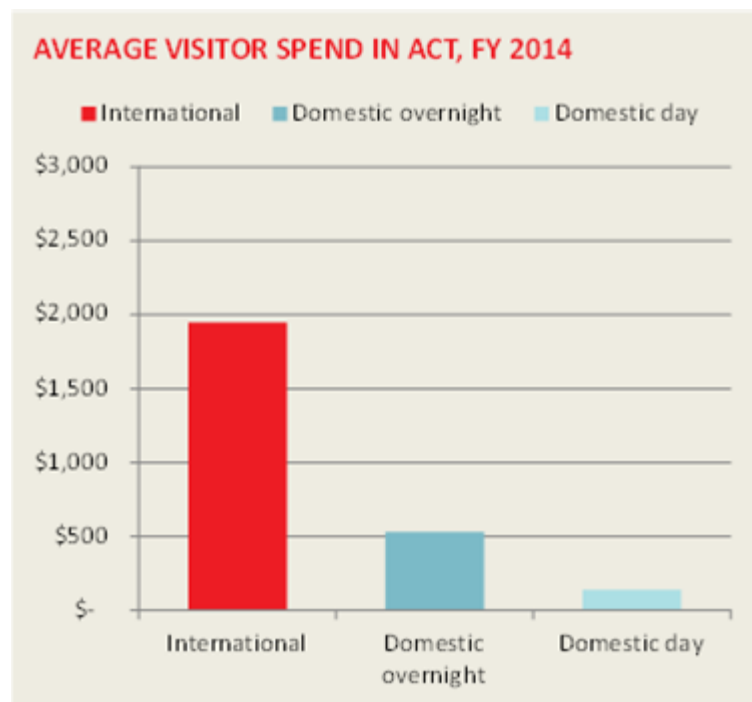


The territory has performed well in capitalising on the emergence of strong demand from a growing Asian middle class, bolstered by the increasing availability of aviation capacity – in particular from low cost carriers – to Australia. Visitation from Asia to the territory has increased at an average rate of 9.8 per cent per annum over the past five years, countering the effects of weaker economic conditions in traditional European and North American markets that have only recently begun to return to growth.

However, this growth has Asia waned in the year ending 2014, down 1.9 per cent and bucking the national trend of 10.4 per cent growth. While visitation continued to increase from mainland China – now the ACT's largest inbound market – Hong Kong and Malaysia, all other key Asian markets delivered decline. Indeed, overall international visitation to the ACT grew at only 1.6 per cent in the financial year, contrasting 7.6 per cent growth across the country.



While international visitors account for a smaller share of total visitor expenditure in the ACT, the high-yielding nature of these visitors make them attractive targets for furthering the economic benefits of tourism – spending an average of \$1,950 in the Territory per trip. The ACT has performed particularly well in the visiting friends and relatives (VFR) segment, with more modest growth in the holidaymaker segment and muted performance in the business and education segments. This latter point should be of note, as the business and education segments are particularly high-yielding – the former for the intensity of expenditure over shorter trips and the latter for ongoing economic contributions over a longer period of visit.



Growing demand for travel to the Australian Capital Territory

The economic benefit of tourism in the Australian Capital Territory extends well beyond the sector itself. Public sector investment in destination marketing is necessary to foster private sector investment in tourism product.

1. Promoting the Australian Capital Territory

Major events such as the 2013 Centenary of Canberra celebrations and upcoming Centenary of ANZAC play a critical role in the visitor economy. This is because events drive demand, giving consumers a time frame in which they must travel or miss out. In 2013, the Centenary of Canberra year, the ACT had outstanding visitation and economic outcomes. Domestic overnight visitors increased by 5.1%, against a national average of +1.8%, with domestic overnight visitor expenditure increasing 12.5%.

Events also add value to the brand and profile of Canberra as a destination, contributing to its appeal in the leisure, business and education markets. The ACT has historically been very good at leveraging the value of tourism marketing and events. A new challenge for the ACT, as it looks to attract direct international flights, is linking tourism marketing with airline attraction. Creating demand in the key international markets of New Zealand and Singapore through tourism marketing will be integral to building the business case supporting these flights.

a. Visit Canberra

Tourism promotion and campaigns drive demand and support visitation to the ACT. The longevity and effectiveness of campaigns, however, are contingent on the ability to add and refresh program content, creating new reasons for visitors to return to the territory. It is imperative increased funding is provided to Visit Canberra to ensure campaigns currently in market maximise awareness and intention to travel to the ACT. Visit Canberra has shown leadership in the area of social media marketing with the award winning '*Human Brochure*' campaign. Media monitoring activities indicated that the '*Human Brochure*' achieved \$81 million in earned media impressions and vastly enhanced both the volume and sentiment of social media content about Canberra. The industry wishes to see this success continue, through further development of this initiative.

Marketing funding should be increased in real terms to preserve the value of current promotions and enable Visit Canberra to continue to innovate and remain competitive with other destination marketing organisations. The industry would also like to see that funding for Visit Canberra is kept for tourism-related activities. This is to ensure funding not used would not be redistributed within the government.

RECOMMENDATION

- Increase funding for Visit Canberra by ten per cent in real terms over forward estimates

b. Major events calendar and business events

Canberra's tourism industry, especially its accommodation sector, suffers from extreme seasonality of demand, contingent on the federal parliament sitting schedule. The territory's calendar of annual events, such as *Floriade*, *Enlighten* and the major exhibitions at the national institutions, has successfully encouraged interstate travel outside these periods, adding value to the visitor experience and providing more consistent visitation and yield for tourism operators.

Increased investment in event organisation and acquisition needs to be prioritised in recognition of its role in driving visitor demand to the territory. Failure to do so will affect the sustainability of the calendar of events and the overall quality and delivery of these activities.

Special Event Fund

The Special Event Fund has been a very successful initiative, allowing government to attract and promote major events which create positive economic outcomes and contribute to the brand enhancement of the ACT. Major exhibitions at the national institutions, such as *Turner from the Tate: The Making of a Master*, *Toulouse-Lautrec: Paris & The Moulin Rouge* and *Renaissance: Raphael, Botticelli, Titian & Bellini*, are clear examples of the significant return on investment that can be made through cooperative support for iconic touring events. The latter exhibition attracted 213,000 visitors and generated \$75 million in additional visitor expenditure in the ACT economy.

To date, the Special Event Fund has allocated \$2.54 million in total across seven exhibitions. These exhibitions have attracted in excess of 910,000 attendees and have delivered approximately \$222 million in economic return to the ACT. TTF supports the continuation of this fund which attracts major demand-driving events to the territory.

Business events

Business events such as conferences, conventions, exhibitions and trade fairs have a similar effect, providing consistent visitation to the territory. Business events attract high-yield domestic and international visitors who spend more and stay longer than the average traveller⁷. The Canberra Convention Bureau has an important role in strategically targeting international business events markets in Singapore and New Zealand. Attracting business events from these markets will increase consumer demand for direct international flights into Canberra, and help support the business case for attracting them.

RECOMMENDATION

- Increase funding for Territory Venues and Events by ten per cent in real terms over forward estimates
- Continue the Special Event Fund initiative which allows the Territory to attract demand-driving events
- Recognise the important role of the Canberra Convention Bureau in attracting strategic international markets in New Zealand and Singapore, creating consumer demand for direct international flights

⁷ TTF analysis of Tourism Research Australia (2014) – International and National Visitor Survey, June 2014 edition

Boosting visitor economy investment

Private investment in tourism product, including hotels, depends on investment in public infrastructure to drive demand. Government assets and precincts which attract visitors to the territory must be maintained, expanded and appropriately planned to grow the visitor economy.

1. City to the Lake project

TTF appreciates the ACT government is in a challenging environment and there are competing priorities for government funding, however, halting planning for the City to the Lake project will have an adverse impact on the tourism industry, broader territory economy and on private sector confidence.

Linking the natural environment of Lake Burley Griffin, Commonwealth Park and Acton Park with the retail, sporting and cultural precincts of the city will make the experiences of these precincts easier to access and create a space where visitors will want to visit and linger. The City to the Lake project will help attract new visitors to Canberra, providing them with additional attractions which will improve visitor spend and length of stay

It is important that planning for the City to the Lake project continues to get it to an investment-ready stage. TTF would recommend that funds are allocated to seek private investment for this major infrastructure project. In the interim, existing facilities need to be maximised to ensure the brand the ACT has developed as a major sporting and business event destination is maintained

a. New Civic stadium

As home of the Australian Institute of Sport and with major sporting events such as the Cricket World Cup and AFC Asian Cup to be held in 2015, there is great potential to develop Canberra as a sports tourism destination. The ACT's sporting stadia have a critical role in supporting large tourism events and TTF supports the concept of a new multi-use stadium located closer to the city. It will increase Canberra's reputation as a sporting and major events destination and the associated precinct will provide visitors with a place to congregate before and after events.

b. New convention and exhibition centre

The business events market is a critical component of the territory's visitor economy. It provides high-yielding visitors who flatten out the seasonality of demand that surrounds the federal parliament's sitting calendar. New convention and exhibition facilities would greatly assist in attracting interstate and international business events. Other states and territories are heavily investing in business events infrastructure and to remain competitive, the ACT needs to as well.

RECOMMENDATION

- Allocate resources to progress planning of the City to the Lake development to an investment-ready stage
- In the interim, maximise existing facilities to ensure ACT's reputation as a major sporting and business event destination is maintained

Improving the visitor experience

The Australian Capital Territory continues to face increasing domestic and international competition for share of the visitor market. The visitor experience – from airport to final destination – is of critical importance in ensuring visitor satisfaction and encouraging repeat visitation.

1. Aviation and visitor transport

a. International air services

Canberra has a world-class airport yet remains one of a handful of national capitals not to have international services. Feasibility studies by the airport, the ACT Economic Development Directorate and external consultants have concluded that Canberra's catchment area, which extends deep into southern NSW, would provide a good outbound passenger base to underpin the valuable inbound international services. Although international services to Canberra would be limited, TTF believes direct services to New Zealand offer the greatest potential to boost visitation to Canberra in the short term.

Services to an Asian or Middle Eastern hub would also appear to be viable based on the number of government and leisure travellers currently flying from the region to Europe. Similarly, we would expect an Auckland service to also offer Canberra residents a new link to the US and South Pacific.

Canberra Airport's new terminal and sterile baggage facilities would satisfy the physical infrastructure requirements of international airports set out by the border agencies. However, a border agency staffing levy imposed by the federal government creates an additional barrier to the ACT receiving international services.

At airports not currently designated as international, the Australian Customs Border Protection Service, the Department of Immigration and Border Protection, the Department of Agriculture, the Australian Federal Police and other border agencies have to charge the airport operator for their presence. This can add a surcharge of around \$15 to each ticket once passed on to passengers. This further adds to the burden Canberra Airport would face in developing a new international route. This is in direct contrast to the aims of the airline attraction fund and runs contrary to what airlines expect from airports in terms of reduced landing fees during route development periods.

The merger of Customs with the Department of Immigration scheduled for June 2015 and closer cooperation with the Department of Agriculture provides an opportunity for the federal government to develop a lightweight

border processing model. This would leverage technological advances in risk assessment and passenger profiling to deliver secure borders with fewer personnel. For airports like Canberra with potential for only limited international services, a lightweight border clearance model is essential in reducing costs and making new services viable.

The ACT government is committed to the attraction of new international carriers, as demonstrated by the \$2.4 million four-year commitment to the Cooperative Airline Stimulus Fund, which supports marketing Canberra as a destination internationally. The ACT government should continue its talks with federal government border agencies to ensure that a new lightweight clearance model is introduced. Canberra Airport, with close proximity to national headquarters of the agencies, could serve as an excellent pilot site for mobile cross-trained border agency teams.

A new route from Auckland or Wellington to Canberra would provide the ideal testing ground for such an initiative. The two countries' border agencies already have deep collaboration and share data on the risk profiles of those on board. The biosecurity and immigration risk for arrivals from New Zealand is very low and, as such, a very small team of cross-trained officers equipped with mobile devices could be deployed to process both outbound and inbound passengers from any new service at far lower cost than previous international flights from Canberra to Fiji.

Similar to an underwriting the Sunshine Coast Council provided Maroochydore Airport to partially offset its border agency staffing levy, there is scope for the ACT government to fund a study into the lightweight integrated border agency clearance model and its pilot in Canberra. TTF will continue to advocate for the removal of the extra levy as it applies to regional airports wishing to trial international services, but there may be a requirement for the ACT government to fund the staffing levy until federal legislation is changed.

RECOMMENDATION

- Continue funding the ACT's international marketing campaign to support new direct international flights into Canberra
- Encourage the federal government to establish Canberra Airport as the pilot site for a lightweight border agency clearance model
- ACT Government to fund pilot phase of lightweight, integrated border agency clearance model for international services

b. Franchising of public transport services

ACTION Buses Canberra operates Canberra's public bus service, one of the last wholly government-run bus networks in Australia. As detailed in TTF's paper *Public Transport, Private Operators*, there is a strong weight of evidence, both domestically and internationally, to demonstrate that franchising public transport services can bring significant benefits to the customer and the taxpayer.

Relative to government-run public transport services, the private sector has stronger incentives to use infrastructure more efficiently, deliver better operational performance, and improve the customer experience. Private operators are able to deliver these benefits because they can leverage significant, often global, experience from involvement with multiple public transport networks, and they are better equipped to attract and retain high quality staff. This can be reinforced by financial incentives to realise efficiencies and deliver high levels of customer satisfaction. In contrast, public operators in monopoly markets tend to lack strong incentives to improve services for customers and increase efficiency.

The introduction of competitive tendering for Canberra's bus network is likely to improve the quality of service and lower the operational costs for government and taxpayers. Consequently, TTF believes the ACT government should explore opportunities to franchise the operation of ACTION Buses.

RECOMMENDATION

- Consider options for franchising ACTION Buses to improve the customer experience and reduce costs

c. Capital Metro

Canberra is Australia's most car-dependent capital city. Until recent years, most residential growth has occurred at the fringe of the metropolitan area with the establishment of low density suburbs, thus increasing reliance on cars. While this model was viable previously, Canberra's road infrastructure is now showing its limits. By 2030, about 200 kilometres of Canberra's road network will reach saturation levels, which will lead to greater congestion costs reaching \$200 million by 2020. As the city grows to over 600,000 by 2050, traffic congestion will worsen, inhibiting productivity and affecting the city's amenity and liveability.

As for other Australian capital cities, public transport has a prime role in reducing congestion costs and improving accessibility across the urban area. Capital Metro 1, the first stage of Canberra's light rail network, is set to become the backbone of the public transport network. Integrated with a re-designed and enhanced bus network, light rail will be a catalyst for change in mobility and urban development. The increased capacity of the transport

network will enable greater urban densities along the selected corridor and reduce the car dependence of Canberra's fast growing northern suburbs.

TTF supports the construction of Capital Metro stage 1, from the city to Gungahlin, and encourages the ACT government to pursue the planning of the broader light rail network via the development of the Canberra Light Rail Master Plan. TTF also supports the light rail project occurring in partnership with the private sector, which will bring potential national and international expertise to the delivery of the service.

RECOMMENDATION

- Build stage 1 of Capital Metro in partnership with the private sector
- Continue planning for further light rail network extensions

d. Rental car regulation harmonisation

The rental vehicle industry abides by eight different state and territory regulatory and tax regimes – with only one state recognising rental vehicles within their own regulatory framework. Regulatory guidance and legislative instruments have been created without a clear national policy objective and lack the simplicity and flexibility required for a healthy operating environment. For operators, this has stymied industry growth, hindered product innovation, reduced the efficiency of the workforce, made it difficult to determine the compliance task, created a significant administrative burden, and led to cost inefficiencies. For regulatory agencies, it has fashioned a significant knowledge gap, limited national data on the size, value and economic contribution of the industry, and created cost inefficiencies.

TTF calls for regulatory and tax reform to ensure the industry has a streamlined national framework that allows it to invest in the innovation required to drive the sector forward.

RECOMMENDATION

- Engage the federal government to harmonise state and territory taxes and regulation for the rental vehicle sector.

2. Enhancing Canberra's retail experience

a. Tourist Refund Scheme

Australia's retail offering is a key attraction for international visitors, particularly those from the growing Asian visitor markets. It is also a key part of achieving the yield targets associated with growing overnight visitor expenditure. To increase competitiveness in this area, Australia needs to reform its Tourist Refund Scheme (TRS). The TRS is the program under which departing travellers can claim back either the Goods and Services Tax (GST) or the Wine Equalisation Tax (WET) on purchases.

However the current system, administered by the Australian Customs and Border Protection Service, can be cumbersome and time consuming. This provides a negative impression of Australia to travellers as they depart, making them less likely to recommend Australia to their friends and them less likely to return. There has been significant reform to the TRS process in recent years, notably with the introduction of online claim forms and through a revision of the rules around multiple purchases and the minimum claim amount. TTF believes that opening up the TRS to a private provider would deliver benefits to Australian tourism, including promotion of Australia as a shopping destination in key source markets and an improved visitor experience leading to increased visitor spending. This is the model adopted very successfully by other destinations in our region, such as Singapore, and used in more than 40 countries worldwide.

The administrative costs of Australia's TRS are currently funded by state and territory taxpayers under the GST agreement. In other countries, the scheme operates on a user-pays basis. The Victorian government is leading the proposal to enhance the TRS through the GST administration sub-committee (GSTAS) of the Heads of Treasuries inter-governmental committee. TTF recommends the ACT government continue to support to the privatisation of TRS administration. This will deliver benefits to visitors, retailers, duty-free operators and the broader ACT visitor economy.

RECOMMENDATION

- ACT Treasury to support reform of the Tourist Refund Scheme as being considered by the GST administration sub-committee

8TH FLOOR
8-10 LOFTUS STREET
SYDNEY NSW 2000
PO BOX R1804
ROYAL EXCHANGE NSW 1225

T +61 2 9240 2000
F +61 2 9240 2020
contact@tff.org.au

www.tff.org.au

TTF 
A U S T R A L I A
Tourism & Transport Forum