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# Destination Management Plan Lasseter Region 2020

## Key Partners





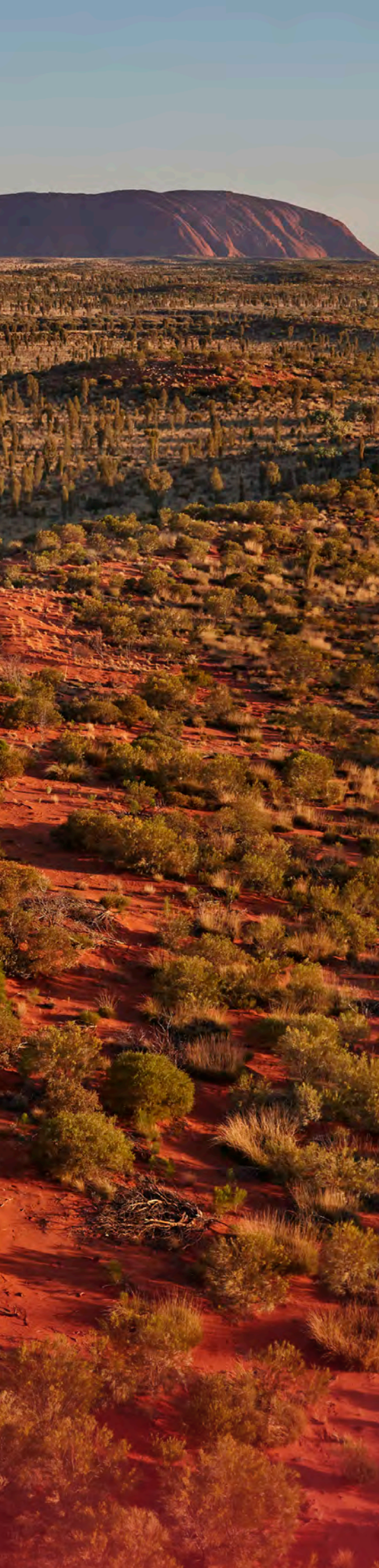


Front Cover:  
*Kings Canyon – Watarrka National Park*

Back Cover:  
*Kata Tjuta - Uluru-Kata Tjuta National Park*

This Page:  
*Longitude 131 with Uluru-Kata Tjuta National Park in the background*





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*Watarrka National Park*

# 1

## The Lasseter Destination Management Plan

The Lasseter Region (the Region) is located south of Alice Springs, extending to the South Australian border and stretching across the width of the Northern Territory (NT), from the Queensland and Western Australia borders.

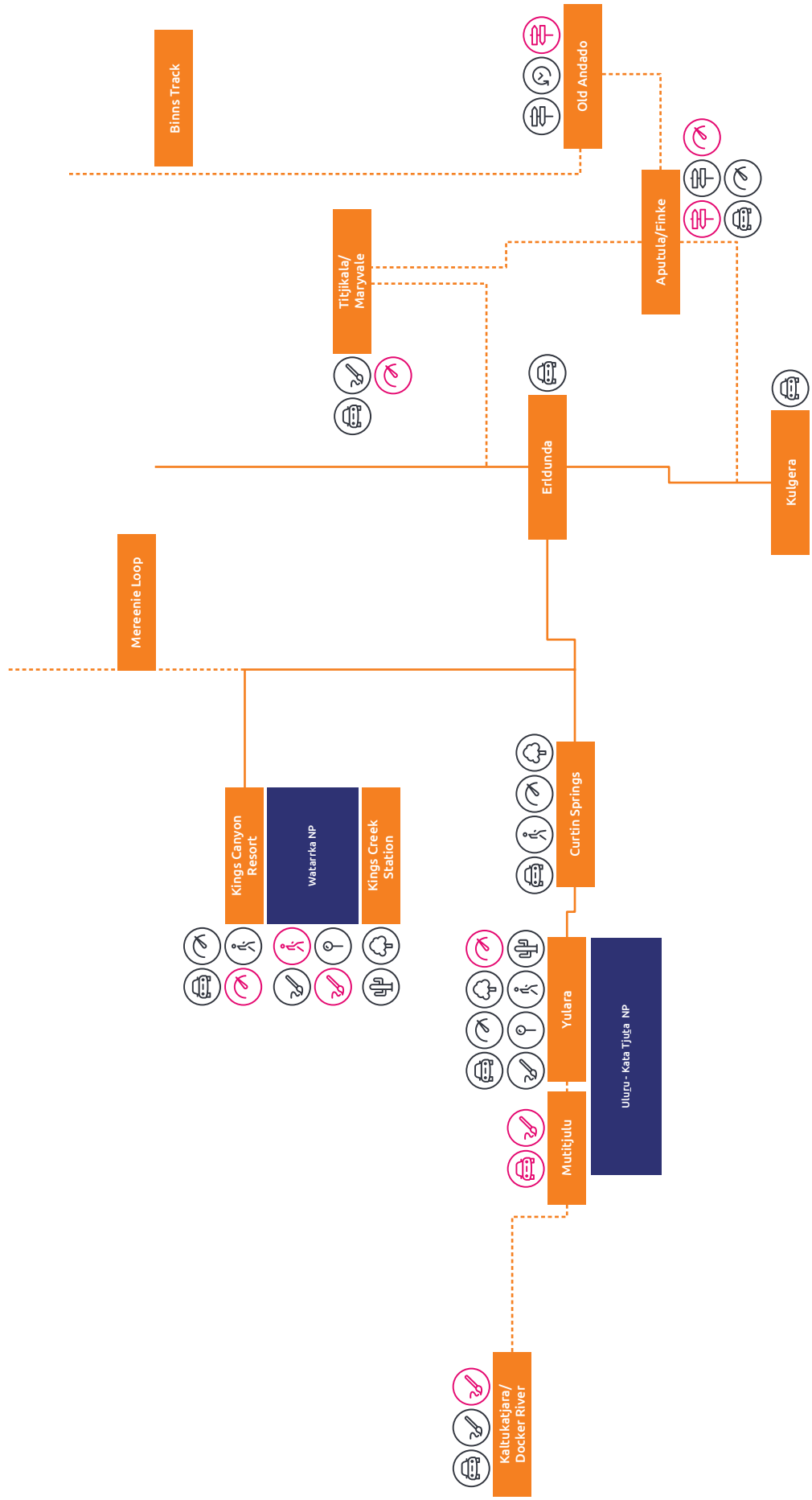
The Lasseter Region Destination Management Plan (DMP) identifies key strengths and assets across the Region. The plan considers visitation demand insights, existing planning and priorities for destinations in the Region and stakeholder input. Actions have been identified to activate opportunities, address gaps and prioritise product development seeking to meet visitor demand while encouraging the development of a sustainable tourism sector for the Region.

The Department of Industry, Tourism and Trade (DITT) has invested in destination management planning as part of a suite of actions following the development and release of the *NT's Tourism Industry Strategy 2030*. Stakeholder contributions were collected through direct engagement or survey responses in the consultation process. Stakeholder feedback has informed the guiding principles for development of the Region's tourism industry and supported analysis and design of the DMP.

## Tourism in the Lasseter Region

The Lasseter Region includes the iconic and World Heritage listed Uluru-Kata Tjuta National Park and Watarrka National Park, location of the famous landmark Kings Canyon. The Region is associated with remarkable landscapes, pioneering history and rich Aboriginal culture. Visitors to the Region are offered diverse and unique natural, cultural and adventure experiences.

Figure 1 also highlights the range of potential experiences to be addressed throughout the Region, as identified during stakeholder consultations (these are marked in pink). The snapshot highlights the potential for the Region to expand its current tourism offerings by enhancing or adding to the existing experiences and developing a sustainable tourism industry.



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Figure 1 - Lasseter Region tourism experiences

Tourism is a critical industry for the Region, contributing

**\$176 million**  
(97% of Gross  
Regional Product  
(GRP) for the Region)

in 2017/18<sup>1</sup> and employing  
approximately

**32%**  
of the working  
population<sup>2</sup>

The Region received an average of

**372,000**  
overnight visitors

with domestic (46%) and international visitors (44%) travelling to the Region in nearly equal proportion.<sup>3</sup> Visitors to the Region most commonly travel by air (comprising 47% of all travellers to the Region), private vehicle travellers comprised 38% of all visitors, while over a quarter (28%) of international visitors travel by bus/coach, highlighting the importance of diverse access options for the Region.

The proportion of the visitor market arriving by private vehicle, including motorhomes and campervans, is relatively small compared to other Regions in the NT. Private vehicle access is most important for intra-Territory visitors who overwhelmingly travel to the Region by private vehicle (92%), while 44% of interstate visitors and only 18% of international visitors arrive by private vehicle<sup>4</sup>.

## Tourism in the neighbouring NT regions

Table 1 below indicates the Lasseter Region is an important contributor to tourism in the NT and particularly important to tourism regions south of Greater Darwin, as it is a destination visited by many travellers in addition to other regions in the NT.

**Table 1 - Travel occurring between the Lasseter Region and other regions of the NT, % of visitors**

Region	Visitor	To Lasseter	From Lasseter
Greater Darwin	International	19	26
	Domestic	13	4
Kakadu and Arnhem Land	International	10	51
	Domestic	7	14
Big Rivers	International	9	40
	Domestic	14	21
Barkly	International	6	68
	Domestic	14	47
Alice Springs and MacDonnell Ranges	International	52	73
	Domestic	45	44

Source - *Tourism NT, Regional Profiles*

<sup>1</sup> Tourism Research Australia, 2019, Tourism Businesses in Australia.

<sup>2</sup> Tourism Research Australia, *Regional Tourism Satellite Account 2017-18: Lasseter*

<sup>3</sup> Tourism NT, *Regional Profile: Lasseter*

<sup>4</sup> Tourism NT, *Regional Profile: Lasseter, Three year average June 2016-2018*

Access to the Region includes road and air travel routes. Notable drive journeys offered to visitors in the Region are listed in Table 2.

**Table 2 - Road access and connections in the Lasseter Region**

Route	Contributes to tourism in the Region, as:	Key destinations of the Region on the route
Lasseter Highway	The primary connection from Stuart Highway to Uluru-Kata Tjuta National Park	Erlunda Roadhouse, Curtin Springs, Yulara, Uluru-Kata Tjuta National Park
Luritja Road	The primary connection between Lasseter Highway and Watarrka National Park	Watarrka National Park
Stuart Highway (also known as Explorers Way)	The primary connection of northern and central NT and SA	Erlunda Roadhouse, Kulgera Roadhouse
Larapinta Drive/Mereenie Loop Road	Non-bituminised connection between Lasseter and Alice Springs/MacDonnell regions (part of the Red Centre Way)	Watarrka National Park
Binns Track	Unique four-wheel drive experience	Old Andado
Old South Road/ Finke Road	Unique four-wheel drive experience (also known as the Old Ghan Heritage trail)	Titjikala/Maryvale, Aputula/Finke, Kulgera Roadhouse

Direct flights offered through low cost carriers are available between the east coast of Australia to Ayers Rock Airport (Yulara), significantly enhancing access to the Region.

Several common experiences and attractions support linkages across the Lasseter Region and other regions in the NT, as shown in Table 3. These connections act both as unique attractions for the Region, as well as attractions that support visitation across the regions.

**Table 3 - Common experiences and attractions in the NT regions**

Attraction	Greater Darwin	East Arnhem Land	Kakadu	Big Rivers	Barkly	Alice and MacDonnell	Lasseter
World War II history	●			●	●	●	
Pioneering history	●		●	●	●	●	●
Aboriginal cultural tourism and the NT Arts Trail	●	●	●	●	●	●	●
The Ghan train journey	●			●		●	
Drive journeys	●	●	●	●	●	●	●
Bird watching	●	●	●	●	●	●	●
Parks and natural attractions	●	●	●	●	●	●	●
Sporting & adventure activities	●			●		●	●
Hiking	●		●	●		●	●

Legend			
● Nature-based offerings	● Transport journey offerings		
● Aboriginal cultural offerings	● History and heritage offerings		



# Destination management planning for the Lasseter Region

A comprehensive study of the current and potential state of the tourism industry for the Lasseter Region was undertaken. This study focused on understanding the current market; available and potential tourism experiences in the Region; opportunities for sustainable growth in the industry; and industry stakeholders' priorities. This analysis highlights that the Region is an iconic travel destination and has opportunities to further develop the range of experiences available to travellers, as well as enhance travel linkages and experiences between the neighbouring region of Alice Springs and MacDonnell Ranges.

## Guiding principles

Stakeholders across the Region welcomed further development of the tourism industry, and identified that approaches to development efforts should be guided by the following principles:

- Build the capability of businesses to grow the potential of the industry over the long term
- Support the social, economic and cultural ambitions of Aboriginal communities through tourism development
- Balance visitation growth with the natural, social and cultural values of the Region
- Promote and develop the Region's deep Aboriginal and pastoral history
- Enhance coordination and collaboration of operators in the Region
- Develop tourism in alignment with the natural values and timeless experiences of the Region.

## Comparative advantages

The Lasseter Region has unique strengths that have motivated visitation to the Region and can be leveraged to further support the development of the Region's tourism industry. Comparative advantages for the Region include:

### The outstanding natural wonder of Uluru-Kata Tjuta National Park;

a bucket list experience for both domestic and international travellers.

### The quality of natural attractions of the Region;

the Lasseter Region includes Uluru-Kata Tjuta and Watarrka National Parks, each recognised for their natural beauty.

### Authentic Aboriginal cultural attractions and experiences;

a range of high quality Aboriginal cultural attractions are available to visitors in the Region and are a key enticement for visitors.

### The uniqueness of the historical and heritage experiences in the Region;

the Region is celebrated for its pioneering heritage.

### The sense of outback adventure;

the Region celebrates and is renowned for its unique outback experience which includes warm hospitality, adventure and off the beaten track experiences.



## Destination awareness

Trade partners, national operators and visitor trends confirm high levels of destination awareness exist for the Region and central Australia; however, this awareness is concentrated on the iconic Uluru-Kata Tjuta National Park. This focus is identified to have created a dependency among tourism operators, creating challenges in marketing the broad range of tourism experiences in the Region.

Notably, the greater capacity for marketing by Voyages Indigenous Tourism Australia (Voyages), Delaware North and AAT Kings establishes a significant base of brand and destination awareness which can be leveraged by smaller operators and Tourism NT to further enhance awareness for the destination and the broader offering and experiences among potential visitor markets.

Feedback from stakeholders and visitors to the Region indicates that opportunities exist to build on current high levels of destination awareness through nuanced marketing and storytelling to highlight the broad range of experiences available in the Region.

## Approach to developing visitor experiences in the Region

While the Lasseter Region is an iconic travel destination, several opportunities exist to continue to develop the tourism industry in the Region through a focus on product development, destination development and capacity building over the next 10 years. To support a strengths-based approach to development, the DMP works to leverage the Region's unique comparative advantages, and strengths in the visitor market while concurrently developing systems and investing in the structures that enable the tourism industry to develop sustainably. Recent recognition of the size and diversity of the accessible tourism market is an example of how an opportunity to progress the Region will utilise multiple tools to meet market needs.

To meet these needs, this DMP utilises the following tools to support sustainable growth.

To best leverage the value of the Region's assets and effectively engage target visitor markets.



**Strategic  
product  
packaging  
and  
marketing**



**Facilitate  
collaborative  
action**

To maximise the efficient and effective use of resources in the Region to advance tourism outcomes.

To build the quality and quantity of tourism product in the Region.



**Investments  
attraction  
initiative**



**Capacity  
building  
activities**

To establish resilience and capability in the industry to deliver quality tourism experiences and support continuous improvements.

## Industry gaps and opportunities

While the Region offers iconic and many unique natural, cultural and heritage experiences for visitors travelling in the NT, opportunities exist to enhance the current tourism offering through the development of new and expanded products and experiences. An analysis of the opportunities and gaps identified in the Region's tourism industry, and approaches to maximising these opportunities or minimising gaps is summarised in Table 4.

**Table 4 - Current opportunities and gaps in the Lasseter Region tourism industry**

		Approach to addressing opportunities and gaps
Opportunities to progress	Build on iconic assets and strong brand awareness to develop tourism experiences across the Region	Strategic product packaging and marketing
	Build on Tourism NT and large operator marketing to communicate the broader tourism experiences available in the Region	Strategic product packaging and marketing
	High demand for Aboriginal and nature-based tourism among Australian and international visitors	Capacity building activities
	Leverage attractiveness of the natural Kings Canyon Walk	Strategic product packaging and marketing
	Leverage the capacity of large operators in the Region, to support and build the capacity of small operators and develop a broader tourism offering	Facilitate collaborative action
	Capacity for product development leveraging the natural, cultural and historical assets of the Region, to meet the needs of current market demand	Investment attraction initiatives and capacity building activities
	Maximise strategic planning, investment in tourism and infrastructure, government services, and stakeholder capacity in the Region	Facilitate collaborative action
Gaps to address	Establish quality food offerings from fresh foods to unique culinary experiences focused on provenance	Investment attraction initiatives and capacity building activities
	Demand for investment in capacity building for Aboriginal tourism product development in the Region	Capacity building activities
	Coordinate land access for prospective investors and developers	Facilitate collaborative action
	Mechanisms for engagement and collaboration between Government, Land Councils, industry and prospective investors	Facilitate collaborative action
	Limited business development capacity among industry operators, including identifying and applying for funding, marketing and product packaging	Capacity building activities
	Strategic coordination and delivery of infrastructure supporting tourism (signage, vehicle turning points, vehicle parking, rest stops, waste services, internet and communications)	Facilitate collaborative action
	Limited existing capacity and the lack of planning and strategic consideration for supporting accessible tourism in the Region	Capacity building activities and investment attraction initiatives
	Variation in the quality and expectation of services and experiences in the Region	Capacity building activities and investment attraction initiatives



## Action plan

To ensure the sustainable development of the Region's tourism industry, a focus on capacity building; collaborative action; strategic product packaging and marketing; and investment attraction is recommended. A plan for the activation of these four tools through strategic actions in partnership with multiple stakeholders in the Region is outlined below.

### Capacity building activities

Demand for capacity building of smaller tourism operators across the Region was identified during consultations. The capability at a destination level as well as in the tourism industry is of central importance to developing and delivering quality tourism experiences and supporting the sustainable growth of the industry in the Region. In addition, opportunities to leverage the large tourism operators in the Region to build capacity across the industry is apparent.

#### Why is this a priority?

- The Region has a total of 9 employing tourism businesses, capacity building will assist in developing scale across the industry<sup>5</sup>
- Visitor data including destination satisfaction surveys identified opportunities to enhance experiences and offerings in the Region, such as diversity and quality of food offerings
- Large operators in the Region have scale and capacity to support the establishment and growth of the capacity of small Aboriginal and non-Indigenous tourism operators in the Region.

Leads:	Partners:	Actions:	Outcomes:
DITT	TCA, Hospitality NT, ISACNT	1. Department of Industry, Tourism and Trade (DITT) in collaboration with Tourism Central Australia (TCA), Industry Skills Advisory Council NT (ISACNT) and Hospitality NT to complete an assessment and deliver a suite of targeted skills development and capacity building training services to tourism operators in the Region (including Regional and Town Councils).	<ul style="list-style-type: none"> <li>• Enhanced skill and capacity of tourism operators to meet industry standards.</li> </ul>
TNT	TCA, Hospitality NT	2. Tourism NT to continue to invest in ReviewPro or similar data collection tools and work collaboratively with TCA and Hospitality NT to support the development of industry standards using data insights.	<ul style="list-style-type: none"> <li>• Enhanced awareness among tourism operators of visitor expectations and satisfaction ratings</li> <li>• Improved satisfaction of visitors to the Region</li> <li>• Improved visitor safety perceptions and ability to share and promote the Region via social media</li> <li>• An annual visitor satisfaction score card.</li> </ul>
TNT	ATC, PIT	3. Tourism NT, the NT Aboriginal Tourism Committee (ATC), Project Implementation Team (PIT) and industry to continue to implement the <i>NT Aboriginal Tourism Strategy</i> to build capacity across the Aboriginal tourism sector.	<ul style="list-style-type: none"> <li>• Increased quantity and improved quality of Aboriginal tourism products.</li> </ul>
Arts NT	ATC, TNT, Art Centres	4. Arts NT in partnership with the ATC to re-evaluate the NT Arts Trail with the aim to identify approaches to deliver this initiative.	<ul style="list-style-type: none"> <li>• Action plan to maximise the outcomes from the NT Arts Trail.</li> </ul>
TNT		5. Tourism NT to work with industry to implement self-assessment and rectify accessibility barriers in their operations.	<ul style="list-style-type: none"> <li>• Enhanced accessibility of tourism experiences in the Region</li> <li>• Increased visitation, consumption and experiences in the Region.</li> </ul>

<sup>5</sup> Tourism Research Australia, 2019, Tourism Businesses in Australia.

## Facilitation of collaborative action

Stakeholders in the Region have identified opportunities to develop the tourism industry by building collaborative relationships between operators in the Region and operators in the neighbouring tourism region of Alice Springs and MacDonnell Ranges. Effective coordination and collaboration across stakeholder cohorts will enhance the likelihood of efficient use of resources, through realisation of opportunities to share resources, obtain information that supports effective planning, and a reduction in duplication and waste.

### Why is this a priority?

- Stakeholders have identified critical business operation and human safety risks resulting from poor communications infrastructure in the Region
- Multiple stakeholders are required to coordinate services and infrastructure essential to the tourism market in the Region, such as waste management, communications infrastructure and signage
- Industry stakeholders engaged in consultation have expressed a desire to have greater engagement with Government agencies and Tourism Central Australia to develop tourism outcomes.

Leads:	Partners:	Actions:	Outcomes:
TNT	PIT	1. Tourism NT to establish a Project Implementation Team (PIT) to deliver, monitor and evaluate the agreed actions of the DMP.	<ul style="list-style-type: none"> <li>• Coordinated implementation of the DMP.</li> </ul>
TNT	PIT	2. Tourism NT, in partnership with the PIT to prioritise tourism communications infrastructure to address 'black-spots' in the Region.	<ul style="list-style-type: none"> <li>• Increased investment in communications infrastructure across the NT.</li> </ul>
DCM&C	TNT, ATC, CLC	3. Department of the Chief Minister & Cabinet (DCM&C), Tourism NT, ATC and the Central Land Council (CLC) to work collaboratively to review and address barriers to the coordination of Aboriginal land access in the Region.	<ul style="list-style-type: none"> <li>• Action plan to improve the coordination of Aboriginal land access in the Region.</li> </ul>
TNT	PIT	4. PIT to work within their agencies to coordinate grant programs to increase efficiency and ensure leveraging of common goals.	<ul style="list-style-type: none"> <li>• Reduced confusion within industry on the multiple grant programs</li> <li>• Enhanced outcomes for the funding available.</li> </ul>
TCA	DITT, TNT	5. Establish sub-Region/sector action and advocacy groups.	<ul style="list-style-type: none"> <li>• Better coordination between regional operators.</li> </ul>



## Strategic product packaging and marketing

High destination awareness exists for the Region among visitor markets, however this is focused on the iconic Uluru-Kata Tjuta National Park. Furthermore, while large operators in the Region bring significant capacity to develop and deliver destination awareness campaigns, small operators have more limited capacity to invest in marketing activities, establishing a dependence on large operators.

### Why is this a priority?

- Visitor satisfaction surveys indicate that additional marketing of experiences in the Region could be beneficial to promote lesser known yet engaging experiences
- Large operators in the Region offer capacity to support and enhance regional identity awareness campaigns that could be leveraged across the industry
- Small operators in the Region have identified the need for support to implement marketing and regional identity awareness campaigns.

Leads:	Partners:	Actions:	Outcomes:
TCA	TNT	1. TCA to facilitate packaging of tourism experiences in the Region.	<ul style="list-style-type: none"> <li>• Enhanced number and range of experience packages for the Region</li> <li>• Increase visitation, consumption and experiences in the Region</li> <li>• Enhanced skill and capacity of tourism operators to develop product packages.</li> </ul>
TCA	PIT, DIPL	2. Tourism NT to deliver a 'Drive Strategy,' building a strategic approach to investment in road infrastructure and linkage of tourism priorities. The PIT to be part of the consultation and have ongoing input in the delivery.	<ul style="list-style-type: none"> <li>• Increased visitation, consumption and experiences by the drive market in the Region</li> <li>• Action plans for the coordination of waste, signage and infrastructure.</li> </ul>
TNT	TCA, DITT, PIT	3. Tourism NT, TCA and industry to support a coordinated destination awareness marketing campaign across the Region and expand on the Region's identity.	<ul style="list-style-type: none"> <li>• Enhanced awareness of the regional identity and offerings of the Region among visitor markets</li> <li>• Increased visitation, consumption and experiences in the Region</li> <li>• Enhanced skill and capacity of tourism operators to market and promote tourism experiences</li> <li>• Enhanced awareness of the remoteness and preparedness of travellers visiting the Region.</li> </ul>
Heritage NT	National Trust, TNT, PIT	4. Tourism NT to support the history and heritage sector to realise the tourism potential of historical sites. Heritage NT and National Trust to continue to assist communities in maintaining and protecting key heritage assets in the Region. Tourism NT to support the history and heritage sector to realise tourism potential of historical sites.	<ul style="list-style-type: none"> <li>• Increased visitation, consumption and experiences in the Region.</li> </ul>

# Investment attraction initiatives

The Region has highly successful tourism product offerings and has several underdeveloped product opportunities which require development, or enhancement to enable a higher quality product offering through private investment.

## Why is this a priority?

- Identified as a core priority in the *NT's Tourism Industry Strategy 2030*, targeted investment in the NT's product and regions will drive significant increases in visitation and stimulate further investment in experiences
- Visitor data identified opportunities to enhance experiences and offerings in the Region, such as the variety of food offerings
- Stakeholder plans and activities to develop the destination present an opportunity to be leveraged by the tourism industry
- Several product development opportunities align to experiences resulting in visitor satisfaction, such as Aboriginal cultural, pioneering railway heritage experiences
- Enhanced access by sealing of the Mereenie Loop and Outback Way.

Leads:	Partners:	Actions:	Outcomes:
DITT	DCM&C, TCA, Hospitality NT, TNT, DIPL, PIT	1. Building on opportunities identified in the DMP, DITT and DCM&C in partnership with TCA, Hospitality NT, Tourism NT and industry, to develop a portfolio of product opportunities and engage across the public and private sector to establish a pipeline and investment prospectus.	<ul style="list-style-type: none"> <li>• Establishment of a structured approach to tourism investment attraction and coordination in the Region</li> <li>• Increased tourism investment in the Region.</li> </ul>
TNT	PIT	2. The PIT to develop and maintain a formalised framework for the articulation and development of investment initiatives in the Region.	<ul style="list-style-type: none"> <li>• A prioritisation matrix to inform the DITT and DCM&amp;C investment pipeline framework.</li> </ul>
TNT	PIT	3. Align industry support and grant funding program outcomes with DMP priorities.	<ul style="list-style-type: none"> <li>• Increased quantity and quality of tourism experiences in the Region</li> <li>• Tourism NT grant programs aligning with DMP priorities.</li> </ul>
TNT	PIT, PA	4. The PIT Government agencies to consider accessibility, when providing comment, or allocating funding to investment initiatives or grant rounds.	<ul style="list-style-type: none"> <li>• Enhanced accessibility of tourism experiences in the Region</li> <li>• Increased visitation, consumption and experiences in the Region.</li> </ul>
TNT	PIT	5. PIT to facilitate improved processes within the respective organisations to expedite investment opportunities.	<ul style="list-style-type: none"> <li>• Increased tourism investment in the region.</li> </ul>

## Acronyms

**ATC** - Aboriginal Tourism Committee

**CLC** - Central Land Council

**DCM&C** - Department of the Chief Minister and Cabinet

**DIPL** - Department of Infrastructure, Planning and Logistics

**DMP** - Destination Management Plan

**DITT** - Department of Industry, Tourism and Trade

**ISACNT** - Industry Skills Advisory Council NT

**PA** - Parks Australia

**PIT** - Project Implementation Team

**TCA** - Tourism Central Australia

**TNT** - Tourism NT



## Product development opportunities

In consultation with stakeholders, priority product development opportunities have been identified to support the sustainable development of tourism in the Region. A complete list and assessment of these opportunities is detailed in Appendix A. With consideration of industry insights, prioritisation of high impact and attainable opportunities that will facilitate the broadest impacts on the development of the Region's tourism industry across the Region are listed in Table 5.

**Table 5 - Priority product development opportunities in the Lasseter Region**

	Product opportunities	Product status	Level of stakeholder support	Current status	Estimated scale of investment	Possible action
Lasseter Region	Seal the Mereenie Loop Road to better connect Watarrka & West MacDonnell National Parks	Existing	Extensive	Identified opportunity	High	Investment case
	Complete sealing of the Outback Way and upgrade the wayside facilities and experiences	Existing	Extensive	Planned Activity	High	In progress
	Enhance regional and remote art centres/Arts Trail product in the Region	Existing	Extensive	Planned	Medium	Planning, grants and funding initiatives
	Expand the quantity of Aboriginal cultural offerings and experiences	New	Concentrated	Identified opportunity	High	Market assessment
	Develop night time tourism experiences	Existing / New	Extensive	Identified opportunity	Low - Medium	Market and feasibility assessment
Yulara	Develop a contemporary Visitor Information Centre	New	Broad	Identified opportunity	Medium	Project assessment
	Establish a new accommodation experience	New	Concentrated	Identified opportunity	Medium - High	Business case
Uluru-Kata Tjuṯa National Park	Develop Anangu cultural tourism experiences in Uluru-Kata Tjuṯa National Park	New	Concentrated	Identified opportunity	Low - Medium	Market assessment
	Enhance the Cultural Centre facilities including contemporary interpretations	Existing	Broad	Planned	Medium - High	Business case
	Enhance the soft adventure tourism offerings	Existing	Broad	Identified opportunity	Medium - High	Market assessment
	Mutiṯjulu to establish a campground/camping with custodians experience within the Mutiṯjulu lease	New	Concentrated	Planned	Medium - High	Business case
Watarrka National Park	Expand the Aboriginal cultural experiences in the Watarrka Region	Existing	Concentrated	Identified opportunity	High	Market assessment
	Improve existing accommodation and establish new accommodation offerings	Existing / New	Broad	Identified opportunity	High	Market assessment
	Develop a multi-day hike in Watarrka National Park	New	Broad	Identified opportunity	Medium - High	Market assessment

Legend	Level of stakeholder support		Estimated scale of investment (\$AUD)	
Nature-based offerings	Concentrated	Local community, individual or single Govt. agency	High	+1 million
Aboriginal cultural offerings	Broad	Community + others, or multiple agencies	Medium	0.1 – 1 million
Drive – journey offerings	Extensive	Community, Govt., multiple agencies and/or industry	Low	0 – 100,000
Quality facilities				

## Implementation, monitoring and evaluation

Tourism NT will lead the Project Implementation Team (PIT) who will be responsible for implementation of the DMP. The PIT consists of representatives from:

- Tourism Central Australia
- Central Land Council
- MacDonnell Regional Council
- Parks Australia
- Mutitjulu Aboriginal Corporation
- Voyages
- Delaware North
- Department of the Chief Minister & Cabinet
- NT Department of Infrastructure, Planning and Logistics
- NT Department of Industry, Tourism and Trade
- NT Department of Environment, Parks and Water Security
- NT Department of Territory Families, Housing and Communities.

The 10 year timeframe for the DMP establishes a need for regular monitoring and evaluation of the effectiveness of the plan in supporting industry growth. This will include annual progress reports and an annual review score card. Reviews of the DMP every two years will ensure stakeholders from the tourism sector as well as stakeholders from all sectors are involved in providing feedback and contributing to a sustainable tourism sector for the Region.







*Flying past Kata Tjuta - Uluru-Kata Tjuta National Park*





Old Andado Track – Lasseter Region

## 2 The Lasseter Region

The Lasseter Region comprises a vast and remote area in the southern-most area of the Northern Territory. Despite being remote, it is widely recognised as home to the World Heritage listed Uluru-Kata Tjuta National Park, an outstanding natural, Aboriginal cultural, and historical destination.

### Introduction

Tourism is one of the most valuable industries contributing to the Northern Territory (NT) economy.

**\$1.2 billion**  
direct Gross State  
Product (GSP)

**\$1.2 billion**  
indirect (GSP)

**9,700**  
direct jobs

**7,400**  
indirect jobs<sup>6</sup>

Tourism has ongoing importance for the NT, being identified as one of five growth sectors in the NT Economic Development Framework (EDF).

To secure the future prosperity of the tourism industry in the NT, *NT's Tourism Industry Strategy 2030* (the Strategy) was developed. The Strategy identifies the need to establish Destination Management Plans (DMPs) for regions in the NT as part of a systematic and sustainable approach to the growth of the industry.

Destination management planning aims to:

- Identify key strengths and assets for each region
- Recommend actions to activate opportunities, address gaps and identify potential investments in order to meet visitor demand.<sup>7</sup>

The Department has initiated destination management planning in the NT tourism regions of:

- Big Rivers (Katherine-Daly)
- Barkly
- Alice Springs and MacDonnell Ranges
- Lasseter.

<sup>6</sup> State Tourism Satellite Account, Tourism Value to the NT

<sup>7</sup> Tourism NT, *NT's Tourism Industry Strategy 2030*.



## The Lasseter Region

The Region is remote and sparsely populated, highlighted by a population density measure of zero persons per hectare<sup>8</sup>. Yet, the Region has a number of administrative bodies coordinating services and infrastructure, and representing stakeholders' interests in the Region including:

- Northern Territory Government
- Commonwealth Government of Australia
- Parks Australia
- Mutitjulu Aboriginal Corporation
- Voyages Indigenous Tourism Australia (Voyages)
- Delaware North
- MacDonnell Regional Council.

The Region contains a commercial aviation airport at Yulara (Ayers Rock Airport) which supports direct flights between several cities in Australia. Outside of air travel, sealed road access in the Region includes the Stuart and Lasseter Highways.

Figure 2 shows the scale and location of the Lasseter Region alongside other tourism regions in the NT.

## Socio-economic profile

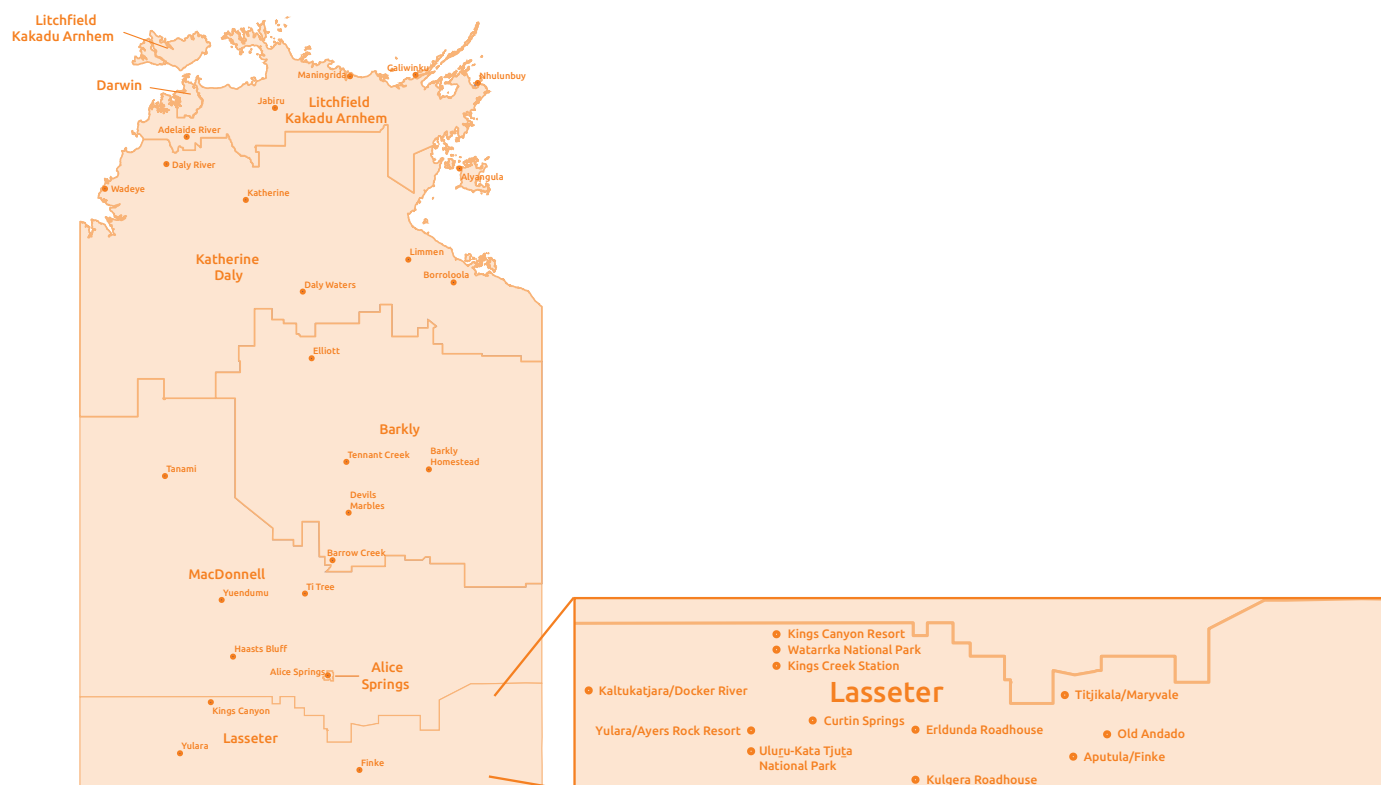
The Region's estimated residential population in 2017/18 totalled 2752 persons, representing 1% of the total NT population.<sup>9</sup>

The Region's Gross Regional Product (GRP) is valued at \$181 million in 2017/18, of which tourism contributed \$176 million (97% of GRP for the Region). Leading sectors in the tourism industry contributing to the Region's economy (measured as Gross Value Added (GVA)) include:

- Transport (\$52 million)
- Accommodation (\$34 million)
- Food services (\$33 million)
- Retail trade (\$11 million)
- Education and training (\$10 million).<sup>9</sup>

A further discussion of the Region's socio-economic profile is provided in Appendix B.

**Figure 2 - NT Tourism regions**



Source - TRA, *Tourism Region Maps, NT*.

<sup>8</sup> Economy id.

<sup>9</sup> Regional Tourism Satellite Account: Northern Territory: Lasseter.



## Tourism offerings in the Region

The Region is associated with iconic landscapes, rich Aboriginal culture, adventure and pioneering history. Visitors can experience the Region through a range of diverse nature, cultural and unique experiences.



## Nature

The NT is well known for its spectacular natural wonders, the most recognised being Uluru, a monolith rising from the desert in the middle of the country of cultural significance for the Anangu people. A vast range of opportunities are offered for tourists to experience Uluru, such as Aboriginal cultural tours, gastronomy experiences, and camel rides.

North-east of Uluru is Watarrka National Park, home to Kings Canyon, a spectacular geological formation in the Region, featuring 300-metre high sandstone cliffs. Experiences at Kings Canyon include bushwalking, Aboriginal cultural tours and scenic flights.<sup>10</sup>



## Destinations of the Region

The internationally iconic destination of Uluru-Kata Tjuta National Park is located in the Region, alongside a number of unique destinations and tourism experiences. Key locations currently contributing to the Region's tourism market include:

- **Uluru-Kata Tjuta National Park**
- **Yulara (Ayers Rock Resort)**
- **Curtin Springs**
- **Kings Canyon Resort**
- **Kings Creek Station**
- **Erlunda Roadhouse**
- **Watarrka National Park**
- **Kings Canyon**
- **Kulgera Roadhouse**
- **Aputula/Finke**
- **Old Andado**
- **Titjikala/Maryvale.**

A summary of each of the key destinations in the Region is outlined in Appendix C.

<sup>10</sup> Tourism NT, *Kings Canyon & Watarrka National Park*.





## Aboriginal culture

Aboriginal culture is strongly associated with Uluru-Kata Tjuta National Park, resulting in cultural tourism being a prominent feature of the Region. In addition to the cultural connection of Aboriginal Australians to Uluru, the Region is home to Aboriginal communities and features Aboriginal rock art, contemporary Aboriginal artists, events, cultural centres and tours sharing Aboriginal culture.



## Adventure

The Region offers a variety of adventure activities that can appeal to a diverse demographic, ranging from adventure tours and activities in Yulara and Kings Canyon to hiking, 4WD trails and the Finke Desert Race, an annual rally race from Alice Springs to Aputula/Finke and back again, considered to be one of the world's most premier rally events.<sup>11</sup>



## Pioneering history and heritage

The Region has a rich pioneering history, dating back to the 1800s and the early exploration of Central Australia by European settlers, including the first south-north crossing of Australia in 1862, the construction of the Adelaide to Darwin overland Telegraph Line in 1871/72, and the first European record of Uluru in 1873 when William Christie Grosse named it Ayres Rock after Sir Henry Ayres, the Chief Secretary of South Australia. The area was largely protected as a system of reserves until the 1930s when the gold prospector HB Lasseter encouraged exploration of the Region.<sup>12</sup> History and heritage experiences in the Region now largely centre on pastoral and pioneering history sites and experiences.

<sup>11</sup> Finke Desert Race, About Finke. <https://finkedesertrace.com.au/about/about-us> (accessed 15 April 2020).

<sup>12</sup> Fact Sheet, Uluru-Kata Tjuta National Park, Parks Australia





Kings Creek Walk - Watarrka National Park

## 3 Destination management planning

The Lasseter Region Destination Management Plan (DMP) aims to guide the sustainable growth of the tourism industry in the Region and the Territory more broadly. The Plan considers the Region's tourism products, visitor trends and expectations, and contributing social and economic factors for tourism planning, to enable a holistic and strategic approach towards growth of the industry over the next 10 years.

### Introduction

Destination management planning is a comprehensive approach to regional tourism development, accounting for social, economic and ecological factors in the destination. It considers the interrelatedness of these factors and their relationship to tourism outcomes.

Destination management is an ongoing process that allows private industry, government and communities to work together to define a unified vision for a destination. A plan to achieve the industry's desired future, and manage the desired outcomes for a destination.

The Lasseter Region DMP presents an important opportunity to engage in long term planning for the sustainable growth of the industry in the Region.

## Theory of destination management planning

Tourism can be an economic driver, contributing to the growth and development of a Region through job creation, investment attraction, and infrastructure development. Equally important are the social benefits delivered from tourism, such as added vibrancy and the lifestyle benefits that attract visitors and residents alike.

Destination management ensures that tourism is cohesively integrated into the economic, social, cultural and ecological fabrics of a community, by considering tourism growth holistically, through a regional lens and over a long-term timeframe.

The guiding approach utilised in the development of the Region's DMP includes:

- Defining the destination and its access points
- Understanding the market and offerings
- Engaging stakeholders to consider the vision for the future of the destination
- Using a clear, structured and well communicated process to engage all stakeholders in the delivery of the vision.

## Imperative for destination management planning

The *NT's Tourism Industry Strategy 2030* (the Strategy) highlights the value of investment in key attractions and regions, for the development of the Territory's regions and ultimately the growth of tourism in the Territory.

Increased investment by government and the private sector, targeting the Territory's products and regions which have the capacity to drive visitation, is a core tenant of the Strategy. The Strategy highlighted the need for Destination Management Plans to:

- Identify investment-ready opportunities across regions, including new experiences and products to be delivered by the private sector, and core infrastructure to be delivered by the public sector
- Identify priority segments for the regions.<sup>13</sup>

The Lasseter Region DMP identifies several priorities and opportunities for:

- The development of new product and experiences
- Infrastructure investments that will aid tourism development
- Gaps in industry capability.

The Region's DMP will serve as a guiding document to support the sustainable growth of the tourism industry.

## Collaboration in destination management

Multiple governing bodies and authorities have an interest and role in the development of tourism in the Region and have made investments in tourism infrastructure and services. An important role of the DMP is to identify and coordinate tourism industry and cross sectoral development initiatives across the Region, to maximise the impact of this activity for tourism, as well as avoid duplication and inefficiencies limiting destination outcomes.

The development of the DMP sought to actively engage a broad range of stakeholders, including those outside of the tourism industry that contribute to the development of destinations. Key stakeholder groups included:

- Parks Australia
- Mutitjulu Aboriginal Corporation
- MacDonnell Regional Council
- Voyages
- Delaware North
- Central Land Council
- Business, community and representative organisations
- NT Department of Infrastructure, Planning and Logistics
- NT Department of Industry, Tourism and Trade
- NT Department of Environment, Parks and Water Security.

A range of guidelines, plans and agreements establishing the vision, focus and plans for destinations in the Region have been considered in this study, to identify opportunities to leverage collective action, and support the strategic investment and allocation of resources in the Region. A summary of these considerations is outlined in Appendix E.

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<sup>13</sup> Tourism NT, *NT's Tourism Industry Strategy 2030*.



## Process of destination management planning

This DMP was developed over successive stages of research, consultation, design and refinement.

To inform the early stages of the planning process, a review of existing tourism strategy documents, such as the *NT's Tourism Industry Strategy 2030*, *Northern Territory Aboriginal Tourism Strategy 2020-2030*, regional municipal plans plus Parks Australia and Parks and Wildlife NT park management plans. Through a combination of document review and desktop research, an understanding of the current state and strategic directions in key destinations in the Territory was established. This provided a basis to commence destination management planning and align the approach of the DMP with existing strategies.

To build on the baseline data established in the early stages of the process, stakeholders were engaged with via a combination of surveys, phone calls, one-on-one interviews, and workshops across the Region. A summary of the stakeholder consultation process and outcomes is detailed in Chapter 5.

The consultation phase provided key insights of stakeholders from the tourism industry and other supporting industries, including government and community representatives. This input provided a check on the early insights gained through desktop research and confirmed the priorities of stakeholders in the Region. Following consultations, demand data from ReviewPro, research from Tourism Australia and Tourism NT, combined with insights offered through discussions with national trade partners and operators were analysed to better understand strategic challenges and opportunities for growth of the tourism industry in the Region.











*Uluru Camel Tours – Ayers Rock Resort*

## 4 Trends in regional tourism

The Lasseter Region has world class natural and cultural assets which position the Region strongly in relation to tourism trends. With travellers increasingly seeking authentic, cultural, and nature-based tourism experiences, the Region is well position to build on its current tourism capability.

### Introduction

Trends in regional tourism in Australia highlight an opportunity for the Region to leverage its available assets to meet the market's high demand for unique, authentic, cultural, and natural experiences.

Yet caution should be applied when considering opportunities in visitation trends, with several barriers to building the tourism industry remaining for the Region, including competition with capital cities in attracting visitors, and the investment in both time and expense required to visit the Region.

Over the next 10 years the tourism industry in the Region could focus its efforts on leveraging its natural, cultural and historical assets to maximise the benefits from current travel trends and expand the attractiveness of the Region through innovative experiences and opportunities. Investment in festivals and relevant events to drive visitation to the Region also presents an opportunity to build value in the tourism market.

**NOTE:** The tourism trends discussed in this chapter are based on information and data prior to COVID-19. Due to COVID-19, it is expected that the short to medium term trends in the Australian tourism industry will be impacted, creating disruption and changes in visitor demand and preferences. Accordingly, it will be critical to review shifting trends across the life of the DMP.



## General trends in regional tourism

Low exchange rates, low inflation, and increases in variable travel-budget options have increased domestic visitation across Australia in recent years. Domestic spend reached a record \$80.7 billion in 2019, with overnight trips increasing 12% from the prior year.<sup>14</sup>

Additionally, the number of international visitors grew 2% in 2019, with international visitor spending also reaching a record, at \$45.4 billion.<sup>15</sup>

Tourism Research Australia's State of the Industry 2018 identified the Asian middle class and the youth market are driving growth in tourism in Australia.

Asia contributed 88% of the \$1.5 billion in tourism spend gained in 2019 from 2018, and 69% of the 185,000 visitor increase.<sup>15</sup> The increasing number of Asian visitors are placing greater importance on experiences and cultural immersion.<sup>16</sup>

The youth market has shifted tourism demands, through a greater use of low-cost carriers, lower patronage of traditional hotel accommodation, and lower average daily spend. They have also caused a higher demand for authentic tourism experiences.

The Region's proximity to Asia, unique natural environments and Aboriginal tourism capacity presents significant opportunities for access by the key Asian market. Yet, while both international and domestic visitation is increasing in Australia, enticing visitors to regional and remote Australia remains a challenge.

A recent study examining regional dispersal in Australia found that among a set of traveller cohorts investigated, those most likely to visit regional destinations in Australia (in order of demand) include:

- Family road trippers, domestic travellers (62% travelled to regional Australia on their most recent trip)
- Traditional international market Gen Y and Z, on their first trip to Australia (59% travelled to regional Australia on their most recent trip)
- Affluent 55+ Australians (56% travelled to regional Australia on their most recent trip).<sup>17</sup>

Conversely, markets less likely to disperse to regional destinations in Australia are:

- The Asian marketing visiting friends or relatives (VFR) (19% travelled to regional Australia on their most recent trip)
- Festival and event goers (34% travelled to regional Australia on their last trip)
- The Asian market Gen Y and Z (41% travelled to regional Australia on their most recent trip).

The study identified that the common motivators influencing those that did not travel to a regional destination on their most recent trip included:

- Family and friends are a central motivator for travel, as opposed to place
- Time and money constraints, for both domestic and international visitors
- A preference for capital cities, which was related to shopping, dining and a greater range of experiences
- For domestic travellers a preference for overseas destinations
- For international travellers (particularly Chinese) a lack of knowledge about regional Australia was a key barrier to dispersal.

These barriers to regional tourism highlight the need for targeted tourism marketing and communication to viable markets, and the importance of coordinated tourism planning that considers strategic approaches to tourism markets, such as greater information sharing and travel planning support to Chinese markets.

<sup>14</sup> Tourism Research Australia, *Travel by Australians year ending December 2019*.

<sup>15</sup> Tourism Research Australia, *International visitors in Australia year ending December 2019*.

<sup>16</sup> Tourism and Events Queensland, *Queensland Asia Tourism Strategy 2016-2025*.

<sup>17</sup> Deloitte Access Economics, 2019, *Understanding visitor regional dispersal in Australia*.

## Festival and event tourism

Festivals and events can be an effective way to attract visitors to a regional destination. Tourism Research Australia published a survey on regional event tourism in 2014 which found that an event can be a main driver for visitation, with 57% of first-time visitors to a region being primarily motivated to visit by an event. In addition, 75% of the survey respondents advised the event was the only reason driving visitation. The survey found that the most popular events include:

- Food and wine
- Music related
- Garden and botanical
- Sport (as a spectator)
- Art exhibitions.

Recent research by Deloitte Access Economics considering visitors to regional destinations identified that of those travellers who prioritise festivals, events and sports when they travel, 34% had travelled to regional destinations in Australia on their most recent trip. For this group, sporting events were the most frequent draw card.<sup>18</sup> Notably this cohort is typically male, more likely to live in regional Australia and their travel involves minimal research and point to point travel.

This research is supported by the experience of the annual Finke Desert Race, considered to be one of the world's most premier rally events. The Race is a two-day event for bikes, cars and buggies that starts in Alice Springs and goes to the remote Finke community in the Lasseter Region, ending back in Alice Springs. The Race attracts 600 competitors, 300 volunteers and an estimated 12,000 spectators each year who camp along the racetrack.<sup>19</sup>

Another example of successful event tourism in the Lasseter Region includes the Field of Lights at Uluru by Bruce Munro. Opening on 1 April 2016 this was initially extended to 31 December 2020 and then further extended indefinitely based on the popularity of the exhibit, which attracted more than 450,000 visitors from its opening in 2016 to September 2019.<sup>20</sup>

## Aboriginal tourism

Increasingly, visitors are seeking authentic cultural experiences. Aboriginal tourism visitors are those who participate in at least one Aboriginal tourism activity during their trip. This can include visiting an Aboriginal site or community, experiencing an Aboriginal art, craft or cultural display, or attending an Aboriginal performance.

Demand for Aboriginal tourism is rising sharply, with the number of international tourists participating in some form of Aboriginal tourism increasing by over 40% between 2013 and 2019. For the year ending September 2019, 77% of international holiday visitors participated in an Aboriginal cultural activity during their trip in the Territory.<sup>21</sup>

Of all regions in Australia, when considering the visitor nights associated with international visitors participating in at least one Indigenous tourism activity, the Lasseter Region had the highest proportion of visitors staying overnight, (88%).<sup>22</sup>

Aboriginal tourism visitors are important for driving demand, but also for their comparative value. These visitors typically stay longer than other international visitors and spend substantially more (\$7,286 per visitor compared to \$4,792).<sup>23</sup>

The demand, value and existing capability to support Aboriginal tourism in the Region establishes the importance of ongoing investment in this tourism sector. The long-term growth trends for visitors seeking authentic cultural experiences suggests this opportunity can be sustained over the long-term, warranting a substantive development and investment timeframe. The Region is already a significant destination in Australia for Aboriginal tourism experiences, and has potential to expand early success in this segment as tourism trends focus on authentic cultural tourism experiences, and stakeholders in the Region support capacity building endeavours.

<sup>18</sup> Deloitte Access Economics, 2019, Understanding visitor regional dispersal in Australia.

<sup>19</sup> Finke Desert Race, *About Finke*. <https://finkedesertrace.com.au/about/about-us> (accessed 15 April 2020).

<sup>20</sup> Voyages, *Successful Field of Light Uluru to extend its stay*. <https://www.voyages.com.au/news-and-media/news/successful-field-of-light-ulu-ru-to-extend-its-stay> (accessed 15 April 2020)

<sup>21</sup> Tourism NT, *Combined Snapshot Year Ending September 2019*.

<sup>22</sup> Australian Government Department of Foreign Affairs and Trade, *Indigenous Tourism Surge*. <https://dfat.gov.au/about-us/publications/trade-investment/business-envoy/Pages/january-2019/indigenous-tourism-surge.aspx>

<sup>23</sup> Australian Government Department of Foreign Affairs and Trade, *Indigenous Tourism Surge*. <https://dfat.gov.au/about-us/publications/trade-investment/business-envoy/Pages/january-2019/indigenous-tourism-surge.aspx>



## Ecotourism

Nature-based tourism is defined as “leisure travel undertaken largely or solely for the purpose of enjoying natural attractions and engaging in a variety of nature-based activities.”<sup>24</sup> Eco and nature-based tourism is becoming more popular and is an attractive investment for regions focused on environmental preservation.

Nature-based tourism was identified as a top reason to visit regional destinations in Australia by both domestic and international visitors.<sup>25</sup> Nature-based and bucket list holidays were the second and third most popular reasons for visiting regional destinations in Australia amongst international visitors.

Of international visitors, ‘nature-based and/or other outdoor activities’ was listed in the top five reasons for visiting regional Australia for the Chinese, Japanese, and American markets. Another study showed that ‘nature and wildlife’ was the number one driver among Chinese, German, Indian, Indonesian, and Korean markets. Overall, Australia was rated as the number one country for nature and wildlife by international travellers.<sup>26</sup>

Australia is widely recognised for quality nature-based travel experiences, being rated as the number one country globally for nature and wildlife by international travellers.<sup>27</sup>

This brand presents an opportunity for the Region to leverage, as it is already known for its geological features and has the potential to further develop nature-based tourism. With Australian terrestrial reserves including National Parks receiving over 1.47 million visitors in 2017-18, an increase of 6.5% from the prior year,<sup>28</sup> and broad national and international demand for this experience, a focus on development of the Region’s nature-based offerings is warranted.

## Key findings

Trends in regional tourism in Australia highlight the significant opportunity the Region has to attract visitors to its destinations, and maximise visitation value, by leveraging the visitor markets’ demand for authentic experiences, which are present through the Region’s many and high quality cultural, historical and heritage, and nature-based assets.

The Region is already focused on nature and culture tourism offerings and is successfully using events and festivals to build visitation and profile, and stakeholder consultations indicated a desire to build on this success.

Opportunities also exist for the Region to grow visitation by implementing distinct approaches to marketing and visitor attraction. This includes establishing which target markets are most likely to disperse to regional destinations in Australia, as well as activities which diminish the barrier deterring dispersal, such as time, cost, and information constraints.

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<sup>24</sup> EcoTourism Australia, *Nature Based Tourism in Australia Manifesto*.

<sup>25</sup> Deloitte Access Economics, *Understanding visitor regional dispersal in Australia*.

<sup>26</sup> Tourism Australia, *Traveller Snapshot: Global*.

<sup>27</sup> Tourism Australia, *Traveller Snapshot: Global*.

<sup>28</sup> Australian Government Director of National Parks, *Annual Report 2017-18*.



*Dining Under the Desert Moon – Kings Canyon Resort*

## 5 Stakeholder consultation

Stakeholders have identified an opportunity to enhance the Lasseter Region's tourism industry over the next 10 years, through a regional approach to tourism. This approach will facilitate a seamless tourism experience, enabled through collaboration, partnerships and collective capacity building.

### Introduction

Stakeholders were engaged from the Region to co-develop the DMP. Stakeholders offer critical consideration for the plan by providing:

- Relationships central to implementation of a DMP
- Insights to guide destination management planning for the Region
- Observational data of the current market, strengths and challenges to assist in the prioritisation of actions in the plan.

The diverse perspectives offered through the consultation helped to build a comprehensive understanding of the opportunities and challenges that exist for the tourism industry in the Region.

### Engagement approach

Stakeholders were identified through desktop research, and in collaboration with government departments, local government and industry representative bodies.

Stakeholders were notified of the study via phone and email contact throughout February 2020. In March stakeholders were consulted face to face in the Region, and phone interviews were conducted with stakeholders unable to join face to face meetings.

A survey inviting stakeholders across the Lasseter, Alice Springs and MacDonnell Ranges regions was utilised to engage with stakeholders not able to participate in interviews. A total of 21 responses were collected for the survey.



## Qualitative data analysis methodology

Thematic analysis of notes taken during stakeholder consultation was used to identify themes and patterns in this data. Key themes arising from the analysis included:

- Aboriginal tourism development
- Business development
- Collaboration/partnership
- Communication and marketing
- Infrastructure.

## Consultation outcomes

Stakeholders expressed a common desire to see investment in tourism industry development, highlighting a need and opportunity to consider and invest in industry development following the recent closure of the Uluru climb.

## Aboriginal tourism development

The Lasseter Region is synonymous with Aboriginal tourism, most notably available through experiences at Uluru-Kata Tjuta National Park. Other successful Aboriginal tourism products exist in the Region, including Karrke Aboriginal Cultural Experience and tours near Watarrka National Park (Kings Canyon).

The need and potential to expand upon this success in Aboriginal tourism in the Region was noted by stakeholders. Established frameworks supporting the development of Aboriginal tourism in the Region were highlighted, including:

- State and Federal Government departments that support joint management plans and employment targets
- Large corporations including Voyages Indigenous Tourism Australia (Voyages), Delaware North and AAT Kings, which provide co-operative product packaging opportunities, significant marketing capacity and social development and employment targets.

Multiple stakeholders indicated Aboriginal tourism development efforts in the Region are achieving positive outcomes including employment and business growth. Examples identified included employment of community members from Mutitjulu at Voyages, and Aboriginal business success supported through contracting at Delaware North.

Land access was raised as a key issue for both new and prospective tourism operators seeking to develop both Aboriginal and non-Aboriginal tourism in the Region. These challenges included interpreting and navigating the process of land access, engagement with the Central Land Council, costs, uncertainty for investors, and length of time. These issues concerned stakeholders and stopped them from pursuing development and progressing tourism opportunities.

## Business development

Like many businesses operating in remote Australia, operators in the Region commonly identified limited business development capacity as a challenge to the success of tourism operations and outcomes.

Challenges for business development identified by small operators in the Region included the size of businesses, remoteness of businesses, and challenges in upskilling staff. These challenges limit the ability of operators to progress business development opportunities, creating a barrier to continuous development and growth of the industry in the Region.

Targeted services for small business operators in the industry were identified as a solution to building business capability in the Region. Services focused on upskilling business operators in the following areas were identified as important:

- online marketing
- sourcing and successfully applying for funding and grant opportunities.

The delivery of business support services through multiple and flexible approaches to best meet the needs of operators in the Region is important.

Diversification of business services to enhance the sustainability of businesses was identified as an important action among operators. However this process is particularly challenging for small businesses who have limited resources to invest in business diversification activities. Mechanisms which can support such development approaches in the Region could have a material impact on the growth and sustainability of the tourism industry.

## Collaboration and partnership

Stakeholders reported that collaboration and partnership are working well in the Region, in particular between various stakeholders including Voyages, Delaware North, small operators, government agencies and representative bodies. However, the opportunity to expand positive working relationships and partnerships across the Region was frequently advised in the stakeholder consultation process. Stakeholders noted that currently partnerships are related to geographical proximity, focused around Uluru-Kata Tjuta National Park and/or Watarrka National Park.

Similarly, engagement with industry stakeholders in the neighbouring regions of Alice Springs and MacDonnell Ranges was highlighted as an important opportunity to be explored in the development of the industry.

Identified opportunities to enhance collaboration centred on product packaging within the Region as well as into Alice Springs. Yet the potential for small businesses to package products is limited due to issues of scale and risk management.

## Communication and marketing

Operators in the Region highlighted it was common that the expectations of visitors are often markedly different to those actually experienced once in the Region. For example, operators spoke of visitors having limited awareness of the degree of remoteness in the Region and limited services available, such as very limited Wi-Fi connectivity. Opportunities identified to address this challenge included the provision of a staffed accredited visitor information centre to provide informed and reliable information about the Region and neighbouring regions.

Efforts to improve awareness and better manage expectations of visitors were considered important to improving the overall visitor experience. Such effort was also considered important for operators, who are most impacted by the mismatch of expectation and experience. The story of the remoteness of the Region was recognised by stakeholders as an important and engaging narrative that could assist in setting realistic expectations, as well as the attraction and retention of visitors.

Marketing of the Region is largely facilitated through the larger businesses operating in the Region, including Voyages and Delaware North, and through Tourism NT. For small businesses, the marketing undertaken by these entities provides significant benefits given the scale of the private operators, however, does create dependencies on large operators for their promotional activities.

Accordingly, word of mouth and online marketing play important roles for small operators in the Region. Online marketing is particularly challenging for small businesses who have limited resources to invest in the development of effective online communications materials. Opportunities for skilling and development of small operators in online marketing was identified as critical by stakeholders.

## Infrastructure

Stakeholders identified a number of opportunities to enhance tourism outcomes in the Region through targeted investment in infrastructure, including:

- The sealing of the Mereenie Loop, to enhance tourism outcomes through improved accessibility to the Region
- Enhanced signage in the Region confirming travel distances or upcoming junctions, to keep travellers informed on their journey
- Establishment of communications infrastructure in Watarrka National Park (Kings Canyon)
- Infrastructure upgrades to modernise park facilities, including leveraging new technologies and design (e.g. cooling and shading solutions)
- Critical infrastructure such as housing, essential services and road access across the Region to ensure the Region can adequately resource industry and market needs now and into the future
- Development of additional waste management solutions (both solid and liquid) across the Region, to increase the total number of waste solutions available.

## Lasseter Region tourism development strategy

The closure of the rock climb at Uluru-Kata Tjuta National Park has provided an opportunity for operators to reflect on a new approach to tourism in the Region which focuses on a broader variety of experiences in and around the National Park and the surrounding Region.

The common vision of stakeholders for the Region is to create an enhanced regional destination that leverages the iconic draw of Uluru to attract visitors, supported by the multiple experiences and destinations available across the Region.

## Current visitation

Stakeholders reported a period of significant growth in visitation over the last two years in association with the closure of the rock climb at Uluru. This growth peaked in the period immediately prior to the closure of the climb, creating significant pressures for operators in the Region at the time.

Following the closure of the climb, operators are reporting a declining trend in visitation, with forward projections akin to the visitation trends experienced in the Region approximately three years ago. Operators advised some early impacts from the bushfires affecting communities in the South East of Australia, and some reductions in international travel in relation to coronavirus, however at the time of consultation the depth of the impact of COVID-19 was not yet known.

## New product opportunities

In considering opportunities to develop tourism products in the Region, stakeholders identified opportunities to enhance adventure tourism offerings in Yulara, develop nature and cultural tourism in the Watarrka National Park area and expand four-wheel driving experiences in eastern Lasseter destinations. Stakeholders suggested the following opportunities to encourage greater investment in new tourism experiences across the Region:

- Development of additional walks/hikes in the Region to build and broaden hiking opportunities
- Development of mountain bike trails and associated services in the Region to build and broaden mountain biking opportunities
- Development of experiences for specialist markets in the Region, e.g. school groups/education market and conservation tourism, etc.
- Enhancing storytelling experiences and opportunities in the Region
- Enhancing Aboriginal tourism experiences.



## Accessible tourism

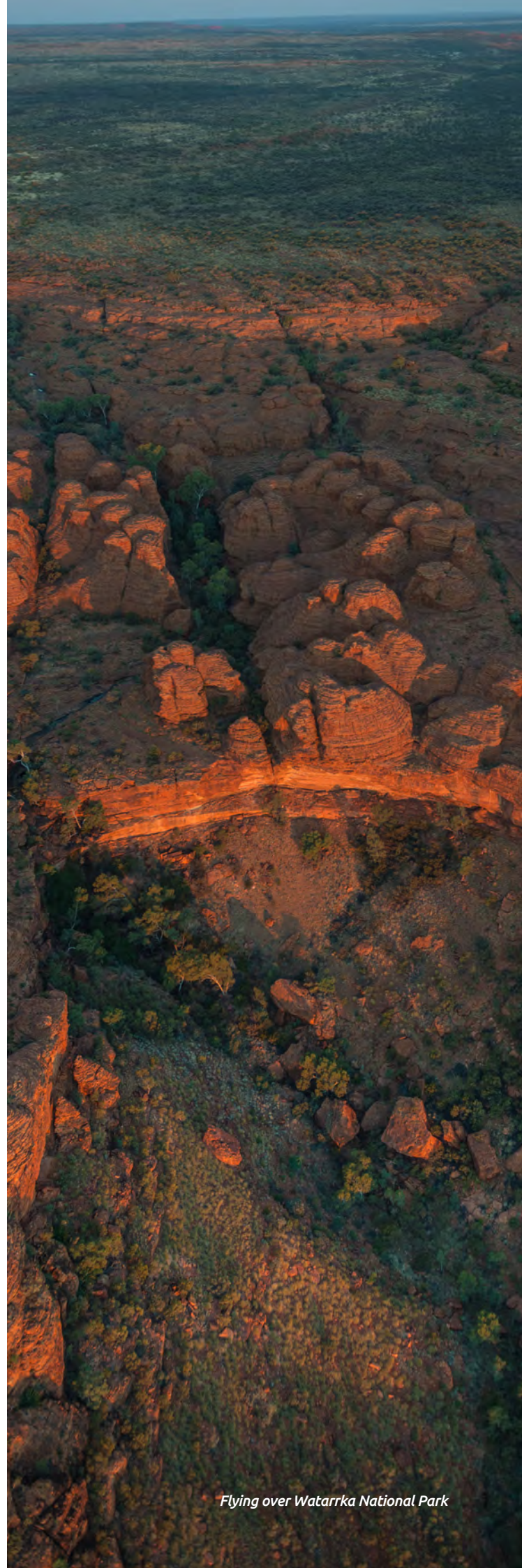
During consultations, stakeholders were prompted to consider opportunities to engage with the accessible tourism market. The existence of some accessible travel options in the Region were noted by operators, however the high cost of establishing accessible tourism options, and the challenge of accessibility in remote and rugged areas of the Region are barriers to expansion of accessible tourism products and services.

Chapter 6 provides evidence that there are potential industry benefits to be achieved through the development of accessible tourism. A discussion on accessible tourism considerations is provided in Appendix F.

## Key findings and direction

Key findings identified through stakeholder consultation for the DMP for the Lasseter Region include:

- Leverage the market reach of large businesses in the Region, including Voyages, Delaware North and AAT Kings to support capacity building in Aboriginal tourism
- Red tape reduction and other approaches to improve timeframes in determining mutually satisfactory outcomes for the land access process
- Establish a facilitation mechanism of investment in tourism in the Region
- Prioritise infrastructure development opportunities in the Region to deliver the greatest benefits in tourism
- Identify best approaches to the delivery of targeted business support services for small tourism operators in the Region
- Facilitate collaboration, coordination and packaging of products between small tourism operators in the Region
- Identify approaches to best support small tourism operators to participate in and deliver online marketing and communications for the benefit of the Region
- Consider specialised marketing campaigns that communicate the extent of the remoteness of the Region, to better inform visitors of the travel experience in the Region
- Establish approaches for product and regional development that maximises the natural landscape, benefits tourism and minimises negative impacts to the environmental, social and cultural landscape of the Region.



*Flying over Watarrka National Park*





Maruku Arts - Uluru-Kata Tjuta National Park

## 6 Visitor market analysis

The Lasseter Region is widely recognised for its iconic destination of Uluru. This destination awareness coupled with high satisfaction among visitors for the range of quality nature, cultural and history and heritage offerings in the Region establishes great potential for the industry to continue to build visitation to the Region.

### Introduction

Consideration of visitor demand insights for the Lasseter Region was obtained through software that collects online visitor feedback, trade partner discussions and insights, national operator feedback, consumer demand research undertaken by Tourism Australia and Tourism NT destination satisfaction research.

Available data on visitor demand specific to the Region is limited, presenting challenges in drawing inferences from the research. Despite these limitations, the insights collected provide an important contribution to destination management planning by offering a point of comparison that can help inform tourism development for the Region.

## Visitor market profile

Tourism is the primary economic contributor to the Region, employing close to 500 people directly and indirectly in 2017/18. For the same period tourism contributed \$153.8 million through Gross Value Added (GVA).

Tourism consumption totalled \$539 million in 2017/18, with the highest spend on:

- Long distance passenger transportation (\$154 million)
- Accommodation services (\$68 million)
- Takeaway and restaurant meals (\$63 million).<sup>29</sup>

Tourism consumption data confirms the important role of touring to tourism in the Region. Further details of visitor consumption are provided in Appendix D.

On average over the three years from 2016 to 2018 the Lasseter Region attracted 58% of the NT's international visitation, 14% of the NT's domestic visitation and 21% of the NT's overall visitation.<sup>30</sup>

Over the three-year period to June 2018, the Lasseter Region received an average of 372,000 visitors annually.<sup>31</sup> Domestic tourists make up more than half (56%) of the visitor market. On average over the three years to June 2018, the region received 39,000 (10%) intra-Territory, 171,000 (46%) interstate, and 162,000 (44%) international overnight visitors annually. The top international sources for visitors were the United States, United Kingdom and Japan. Figure 3 summarises key characteristics of these three visitor markets.

The proportion of the visitor market arriving by private vehicle is relatively small compared to other regions in the Territory, with just 38% of visitors arriving by private vehicle (includes motorhomes and campervans). Intra-Territory visitors overwhelmingly travel to the Region by private vehicle (92%), while 44% of interstate visitors and just 18% of international visitors arrive by private vehicle.<sup>31</sup>

More commonly, 47% of all visitors to the Region arrive by air, with air travel the most common transport for interstate (47%) and international (57%) visitors<sup>31</sup> highlighting the importance of air travel access to the Region.

More than a quarter (28%) of international visitors arrive by bus/coach, reinforcing the important role of structured touring for visitation to the Region.<sup>31</sup>

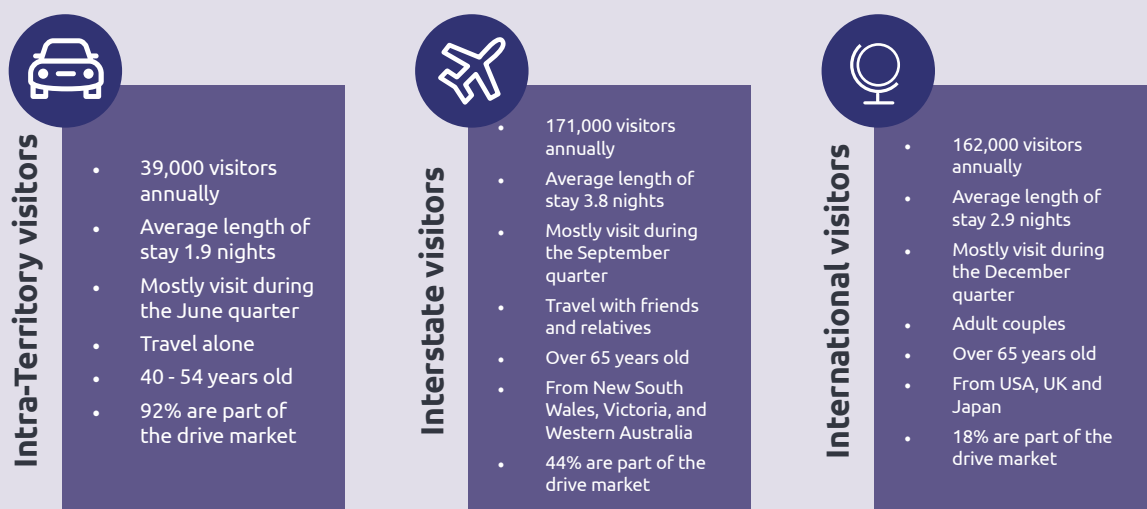
Of the international visitors to the Region, almost all entered the country through a different State before travelling to the Region, with just 3% of international visitors entering the country through Darwin. Sydney was the most common entry point (47%), followed by Melbourne (25%).<sup>29</sup> Of international travellers who visited the Region, just 13% also visited Greater Darwin, however 52% also visited Alice Springs MacDonnell, highlighting the importance and opportunity to build the industry, through collaboration across Regions.<sup>29</sup>

Of visitors to the Region, persons visiting for business made up 10% of the total market over the three years from 2017 to 2019.<sup>32</sup> Of the business travellers to the Region almost all were domestic travellers.<sup>33</sup> On average business travel in the NT involved a stay length of 4.6 nights in 2019<sup>34</sup>, this compares to the average length of stay of all domestic visitors to the Lasseter Region which averaged 3.4 nights over the three years 2017 to 2019.<sup>35</sup>

Youth, Backpacker and Working Holiday Maker data shows 17% of the total visitors to the Region are within the youth (15-29 years old) sector. The majority were leisure travellers as the Region does not offer work favoured by WHM's.

Additional information on the visitor market is detailed in Appendix D.

**Figure 3 - Visitor market profile**



Source: Tourism NT Regional Profile: *Lasseter*

<sup>29</sup> Tourism Research Australia, *Regional Tourism Satellite Account 2017-18: Lasseter*

<sup>30</sup> Tourism NT, Research, *Regional Visitation*.

<sup>31</sup> Tourism NT, *Regional Profile: Lasseter, Three year average June2 2016-2018*

<sup>32</sup> Tourism NT, *Lasseter Regional Report, 2017-19*

<sup>33</sup> *ibid*

<sup>34</sup> Tourism Research Australia, *Domestic Business Visitors, 2019*.

<sup>35</sup> Tourism NT, *Lasseter Regional Report, 2017-19*



## Visitor feedback and perceptions

Tourism NT seeks feedback from visitors to the Region and from potential visitors to understand challenges, issues, and opportunities for improvement. Tourism NT utilises this feedback to develop marketing for the Region as well as to target industry development support. Tourism NT utilises a range of sources to collect feedback and market insights including ReviewPro software, satisfaction research, national operators and trade partners and Tourism Australia research.

### ReviewPro

ReviewPro is a software platform for the tourism and hospitality industry to understand and improve visitor experiences. ReviewPro provides data collection tools and services such as guest satisfaction surveys, guest messaging hubs, and auto case management. ReviewPro's reputation management tool searches 175 online review sites such as Tripadvisor, Google, Booking.com, and Expedia to gather data from visitors' reviews of experiences such as hotels, attractions and restaurants. The tool conducts sentiment analysis to provide insights about guests' experiences.

ReviewPro benchmarks groups of hotels or operators through a Global Review Index (GRI). The data collected through ReviewPro can assist with the optimisation of pricing, setting quality objectives, or tracking performance over time. ReviewPro is utilised for tourism industry development in other states and jurisdictions in Australia, including Tourism and Events Queensland.

## ReviewPro data analysis

Tourism NT has utilised ReviewPro's reputation management tool to gather data about the Region. ReviewPro data shows that visitors to the Region have an overall positive experience.

In addition to the benchmarking provided by the GRI, the ReviewPro tool includes online visitor feedback relating to service, location, room, value, cleanliness, entertainment and food and drink.

Reviews of hotels, tourist spots, and operators in the Region are mostly positive, with 74% of mentions rated as positive, and an overall GRI of 89%. This measure can be compared against the Tourism and Events QLD's benchmark for operators to be listed in the best of QLD experiences at a GRI of 80.

Notably, in responses to the question "would recommend the spot", 98% of respondents confirmed they would.

The largest proportion of the online review data collected from ReviewPro came from those travelling as a couple (47%), with almost one-third of reviews from those travelling with family (32%), and the balance split across those travelling in a group (10.8%), solo, for business, and under other categories.

The Region's GRI reflects feedback relating to 20 establishments/places and experiences in 2019. Individual experiences also received a GRI rating, the lowest of which was 74% and the highest was 100%.

There were 9,633 reviews during this timeframe, which was a decrease of 358 reviews from the previous year.

In terms of online reputation, the positivity ratings were:

- GRI 74%
- Service 70%
- Location 85%
- Room 70%
- Cleanliness 55%
- Value 46%
- Food and drink 75%
- Decoration 72%
- Entertainment 84%.

Accommodation providers in the Region have GRIs ranging from 74% to 95%, indicating a wide variation of standards across the Region.

Findings from the ReviewPro data highlight the positive engagement between travellers and staff, and the opportunities to improve visitor ratings of value in the Region. From the key review categories:

- Service had a total of 631 references, being largely positive (70% of all references)
- Value had a total of 205 references, being mostly negative (54% of all references).

Overall, reviews were positive, but location received the highest proportion of positive reviews, and notably value was rated very low.

## NT destination satisfaction research

Tourism NT undertook destination research from October 2018 to July 2019 to measure satisfaction both overall and with specific aspects of the visitor experience in the Territory's tourism regions.

A mean score of 6.1 for overall satisfaction (on a 7-point scale) was recorded for the Region. This was the highest satisfaction score recorded for all tourism regions in the NT. Satisfaction ratings were similar across interstate, intrastate and international visitors (all achieving a mean score above 6). This is notable as a number of other regions obtained higher ratings by domestic visitors than by international visitors.

The feedback on the Region highlighted that:

- Uluru is a highlight in a trip to the NT for many and is a bucket-list stop for domestic and international visitors
- Kata Tjuta (the Olgas) was very impressive for visitors and identified as needing greater promotion and marketing
- Visitors rated Kings Canyon highly, with the rim walk being the highlight of the area
- Kings Canyon camping/hotel facilities obtained mixed reviews
- The cost of visiting and staying at Uluru is considered expensive for many visitors
- The Field of Light experience was a highlight for almost all respondents
- Food in Lasseter obtained the lowest ratings across the NT's tourism regions, being considered expensive and limited in variety.

Key findings across the NT highlight that:

- The warmth and hospitality of the people visitors met on their journey was considered to be the best part of the visitor experience
- Intra-Territory visitors would like to see improvements regarding the variety of food and facilities available
- Domestic visitors are much more likely to recommend the NT to others compared to international visitors
- The NT is considered to be attractive to someone who wants something out of the ordinary, is adventurous and who wants to learn new things.

When considering specific aspects of their visit in the NT, generally:

- For many, the quality of food exceeded expectations, but a lack of variety of fresh food and options catering to dietary restrictions was an issue
- There was a demand for more bush-tucker experiences
- Most people are impressed with the natural beauty of the Region's Parks, but noted the need for upgrades in Parks
- Most people want to experience authentic Aboriginal culture
- Staff hospitality was appreciated across NT
- While most people love caravan park experiences across the NT, variability was noted.

## National operator feedback

A range of national operators were engaged to obtain feedback and insights on market demand in the Region and across the NT. Operators engaged included:

- Voyages Indigenous Tourism Australia
- Qantas
- Journey Beyond
- Accor
- AAT Kings
- Tourism Australia.

Feedback highlighted the importance of nature and wildlife as well as authentic Aboriginal tourism experiences to the visitor market, and the potential to deliver these experiences across the Territory. Investment in National Parks was considered to be a key strategy to developing nature-based tourism opportunities across the Territory.

Operators identified opportunities to enhance destination marketing in the Territory, by leveraging the scale of marketing investment from Tourism NT and national operators with larger marketing budgets, such as Qantas.

Operators pointed to the success of Nitmiluk Tours, and the opportunity this offers to develop a model to guide the development of Aboriginal tourism products across the Territory.

Accessibility to the Territory was another key issue, with a role for government in attracting and supporting sustainable aviation capacity to the NT to improve accessibility. An aviation strategy that looks at increasing volume through enhanced air travel access/coordination between Sydney, Uluru and the Barrier Reef would be a benefit for Alice Springs and Lasseter.

Opportunities to advance the industry through the development of contemporary products (e.g. dining), and the quality of accommodation in the Territory was highlighted by



## Trade partner feedback and insights

In 2019 Tourism NT sought feedback from three key markets (US, Germany, and UK) to gain insights into challenges and opportunities for attracting visitors to the Territory. Key themes arising from the feedback included:

- Flights
- Travel planning
- Destination awareness
- Product offering.

### Flights

Flight availability and cost were identified as barriers to attracting visitors from the US, German and UK markets to the NT. In the past decade, international airline capacity to the NT has declined, while other major Australian airports' capacity has increased, creating greater competition between Australian destinations. This was particularly evident in the UK market following the introduction of a direct flight from London to Perth.

Additionally, the expense and availability of domestic flights is a barrier for these markets. For example, the UK market has shown interest in travelling to Alice Springs from Perth but limited flight options for this route is a barrier to uptake. The same market has expressed interest in flying directly to Uluru, however this route is not available. Domestic flights from another capital city to Darwin or to Alice Springs were also noted to have restrictive costs, reducing the NT's competitiveness within Australia.

### Travel planning

Many visitors to Australia have limited time, and this has manifested in shorter lengths of stay. Some travellers are extending layovers in other countries on their way to Australia, which is also causing shorter stays in Australia. When visitors have limited time, it is understood that they typically avoid visiting the NT.

For some markets like the US, visitors plan their trips around seeing several "iconic" Australian destinations including Sydney, the Great Barrier Reef and Uluru, in a short period of time. This has caused short lengths of stay at Uluru and means visitors do not disperse from there, but rather move on to the next destination.

Notably, repeat visitors are more likely to visit regional destinations and seek 'off the beaten track' experiences, highlighting an opportunity for the Region. In the German market, the share of first-time visitors to Australia has decreased while the share of repeat visitors has increased. There are opportunities to increase visitation to the NT, particularly for the self-drive market and to promote Explorers Way.

A key barrier to visitation at Uluru is lack of accommodation availability. It was noted that this may be due to the uptake in visitation prior to the climb closing and might not be an ongoing issue.

## Destination awareness

Brand and destination awareness for the Red Centre Region (which comprises Alice Springs and MacDonnell Ranges Region and the Lassetter Region) is high. It is a bucket list destination, presenting an iconic marketing vehicle.

It is notable that the Territory typically performs better when promoted in conjunction with unique products like the Ghan, or with travel in other States which offer contrasting experiences, such as the Explorers Way drive from Adelaide to Darwin.

In the competitive global tourism market, increased marketing sponsorship is vital for building the attractiveness of the NT's tourism opportunities. It was considered that this is most effective when partnering with large, volume-producing partners.

Trade partners also advised that some markets, such as the German youth market, have a view that 'everyone' has already been to Australia, and therefore seek new destinations. Australia is a popular destination, marketing should focus on the idea that though many people have visited Australia, not many have seen the real, authentic Outback. Marketing the destination as a unique and 'off the beaten track' experience will help it appeal to these markets.

### Product offering

Improvements in product offerings and developed products such as Aboriginal tourism, have been made across the Territory. There is a view that value for money in the NT is lower than in other destinations in Australia. New glamping facilities and accommodation options in the Territory were recognised as improvements, however some key destinations are still seen to lack product offerings, particularly luxury accommodation. Accommodation is an issue among the UK and US markets. The price of tours and accommodation was highlighted as an issue for potential visitors, who believe they can get a similar experience elsewhere for less money.

Trade partners advised that for the UK market, a perceived lack of investment in new product and infrastructure is a deterrent to visitation. While other destinations around Australia have developed a sophisticated product offering, the NT has not. The UK market is seeking uniquely designed hotels, incredible dining experiences, artisan producers, hipster coffee shops and cultural immersion, which is why Tasmania has been a popular destination for this market.

Some markets, like the German market, are increasingly seeking sustainable tourism options such as eco-friendly retreats or guided tours.

Additionally, it was suggested that changes to The Ghan schedule, which allow visitors to break their journey in Alice Springs, will facilitate more exploration of the area including allowing visitors to journey to Uluru.

# Consumer demand analysis

The Consumer Demand Project (CDP) is run by Tourism Australia and includes insights from 11 key markets: Indonesia, New Zealand, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA and UK. The CDP focuses on key demand drivers, travel behaviours and preferences, purchase funnel and brand health metrics.

The CDP also focuses on high value travellers, which are travellers who:

- Travel long haul, out of region, on a regular basis
- Have considered or intend to travel to Australia
- Consider food and wine, aquatic and coastal, and nature and wildlife as key drivers for their destination choice
- Have above average trip expenditure, including likelihood to stay longer and disperse further.

When choosing a destination, the most important factor of the 11 key markets was safety and security. The second most important factor overall, but the primary factor for the Korean, Chinese, Indian, German and Indonesian markets was ‘world class nature and wildlife’. Other top five factors were:

- A destination that offers value for money
- Good food, wine, cuisine and local produce
- Friendly and open citizens, local hospitality.

High-value travellers had the same top five drivers, but in a different order. For this market, ‘world class nature and wildlife’ is the most important factor.

Domestic travellers top five important factors in considering a destination are:

- A safe and secure destination
- A destination that offers value for money
- World-class nature and wildlife
- Rich history and heritage
- Friendly and open citizens, local hospitality.

The survey confirms that Australia is most strongly associated with nature and history experiences. Of the select Australian destinations ranked for their association with these experiences, three destinations in the NT were included in their ranking listed below:

Table 6 - Associations for NT destinations

	Association with nature and wildlife	Association with history & heritage
Kakadu	4th	7th
Uluṛu	7th	3rd
Darwin	15th	13th

In terms of net promoter score, Kakadu National Park had the highest of all Australian destinations, Uluṛu ranked third after Kangaroo Island, and Darwin ranked seventeenth. Notably destinations in the Territory were all ranked higher among domestic travellers.

The CDP included a test of 20 Australian and 20 international experiences, with respondents viewing 4 randomly selected experiences from each offering. Two of the experiences tested that related to The NT included: experiences in Nitmiluk National Park; and The Ghan Expedition Rail Journey (Ghan). When comparing traveller preferences, the Ghan and experiences in Nitmiluk National Park were valued more highly by domestic travellers than international travellers as shown in Table 7.

Table 7 - Traveller rankings of The Ghan and Nitmiluk experiences

Traveller	Ghan	Nitmiluk
Domestic	13	23
High value international	17	36
General international	21	38

For the Ghan experience, the highest ranked attractions for domestic and international travellers included the landscape, train experiences and day trips. For experiences in Nitmiluk National Park, the key attractions included cruising the Gorge; stories of the Jawoyn people; and the leisure and hospitality experiences.

CDP results indicate that in particular, experiences in Nitmiluk National Park had low appeal to both the general international and high value international markets.

The findings of the CDP highlight the high recognition and value attributed to the Region by travellers, and the opportunity to continue to build on and leverage the natural and history and heritage assets in the Region.

## Accessible tourism

Limited data is available to understand the profile of visitors to the NT travelling with accessibility needs. However, some indication of the potential market can be extrapolated through other states in Australia. In Queensland, domestic travellers with a disability accounted for 8% (289,000) of the Queensland adult population, and the average travel party size for a visitor with a disability was 2.3. When including children, the domestic accessible tourism market accounts for 13% (657,000) of Queensland's total population. Estimated spend for travel parties including a person with disability was \$1.9 billion, roughly 10% of total domestic spend in Queensland.<sup>36</sup>

Similarly, travellers with a disability represented 7% (349,000) of Victoria's adult population, and the average travel party size was 2.2, accounting for 12% of Victoria's total population (784,000). The estimated spend for travel parties including a person with a disability was \$1.7 billion, 79% of which was overnight spend, accounting for 10% of total domestic spend in Victoria.<sup>37</sup>

Without a study of disability travel in the NT, the current value of this market is unknown, yet with efforts to establish accessibility, it is not unreasonable to assume that the NT could also generate similar outcomes to the Queensland and Victorian markets.

Accessible tourism is an important consideration for the Lasseter Region with a substantial number of self-drive travellers which include cohorts that benefit from greater levels of accessibility, including families with children, 86% of who choose to travel by private vehicle<sup>38</sup>, and older non-working travellers, 81% of which also self-drive.<sup>39</sup>

## Key findings

Visitation to the Region is unique in comparison to other NT tourism regions, with a nearly equal portion of domestic and international visitors. In addition to this, both personal vehicle and air travel are important means of access for visitors to the Region, as is touring which accounts for over one-quarter of visitors to the Region. This highlights the need for broad approaches to accessibility and attraction that cross the multiple visitor markets.

While the Region is relatively accessible by air, there is opportunities to further improve access by reducing barriers including time, cost and availability. Coordinating air travel with Alice Springs, supporting cost-effective air travel options, and pursuing strategic approaches to air travel which engage markets in other states such as Sydney and Melbourne should be pursued.

The data collected in the visitor market analysis highlights the high satisfaction ratings for the Region, and that the strengths of the Region include:

- Destination awareness and association as a bucket-list experience
- Nature based offerings
- The range of experiences, particularly the natural, Aboriginal art and culture, and history and heritage offerings.

Weaknesses and challenges to increasing visitor demand for the Region include:

- Addressing the limited range of food options in the Region
- Accessibility of the Region, particularly time and cost of travel.

The visitor market insights highlight that opportunities to support growth of tourism in the Region should include:

- Building repeat visitation to the Region
- Strategic and targeted efforts to minimise barriers of time and air accessibility to the Region.

The Region has strong brand recognition, market demand and satisfaction. This highlights opportunities to continue to develop offerings focused on the unique natural, cultural and historical assets of the Region. Notably re-investment in the Region's current products or development of new offerings will be important to maintain the high standard of tourism experiences in the Region.

<sup>36</sup> Tourism Research Australia, *Accessible Tourism in Victoria and Queensland*.

<sup>37</sup> Tourism Research Australia, 2018, *Accessible Tourism in Victoria and Queensland*.

<sup>38</sup> Tourism Research Australia, *Families with Children*.

<sup>39</sup> Tourism Research Australia, *Older non-working travellers*











# Appendix A - Product development opportunities

In consultation with stakeholders and through analysis of established plans for development across the Lasseter Region, the following product development opportunities have been identified to support sustainable tourism development in the Region.

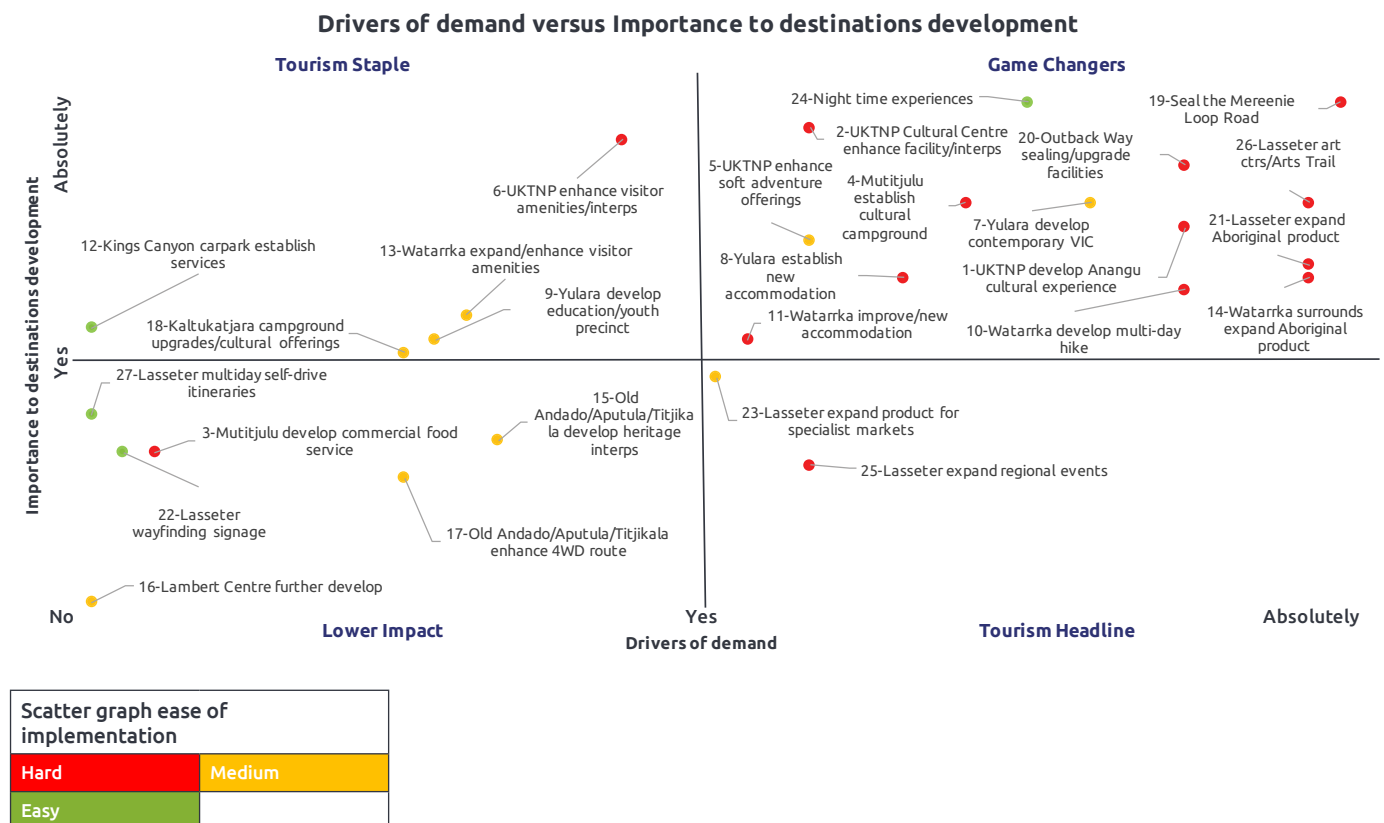


	Chart Ref	Product opportunities	Product status	Level of stakeholder support	Current status	Estimated scale of investment	Possible action
Uluru-Kata Tjuta National Park	1	Develop Anangu cultural tourism experiences in Uluru-Kata Tjuta National Park	New	Concentrated	Identified opportunity	Low - Medium	Market assessment
	2	Enhance the Cultural Centre facilities including contemporary interpretations	Existing	Broad	Planned	Medium - High	Business case
	3	Mutitjulu to develop a commercial food service on the Mutitjulu lease	New	Concentrated	Planned	Medium	Business case
	4	Mutitjulu to establish a campground/camping with custodians experience within the Mutitjulu lease	New	Concentrated	Planned	Medium - High	Business case
	5	Enhance the soft adventure tourism offerings	Existing	Broad	Identified opportunity	Medium - High	Market assessment
	6	Enhance and expand the visitor amenities and modern interpretive infrastructure in Uluru-Kata Tjuta National Park	Existing	Extensive	Planned	Medium-High	Project assessment
Yulara Ayers Rock Resort	7	Develop a contemporary Visitor Information Centre	New	Broad	Identified opportunity	Medium	Project assessment
	8	Establish a new accommodation experience	New	Concentrated	Identified opportunity	Medium - High	Business case
	9	Develop an education/youth tourism sector precinct	New	Concentrated	Identified opportunity	Low - Medium	Market assessment
Watarrka National Park	10	Develop a multi-day hike in Watarrka National Park	New	Broad	Identified opportunity	Medium - High	Market assessment
	11	Improve existing accommodation and establish new accommodation offerings	Existing / New	Broad	Identified opportunity	High	Market assessment
	12	Establish visitor services at the Kings Canyon carpark	Existing	Concentrated	Identified opportunity	Medium	Business case
	13	Expand and enhance visitor amenities in Watarrka	Existing	Expansive	Identified opportunity	Medium	Business case
	14	Expand the Aboriginal cultural experiences surrounding Watarrka	Existing	Concentrated	Identified opportunity	High	Market assessment
Old Andado / Apukula (Finke) / Tijikala (Maryvale)	15	Develop railway, pastoral and mining heritage interpretations	New	Concentrated	Identified opportunity	Low - Medium	Market assessment
	16	Further develop the Lambert Centre	Existing	Concentrated	Identified opportunity	Medium	Market assessment
	17	Enhance 4WD route experiences	New	Concentrated	Identified opportunity	Low - Medium	Include in Drive Market Strategy
Kaltukatjara (Docker River)	18	Complete campground facilities upgrades and expand cultural offerings	Existing	Concentrated	Planned	Medium	Business case
Lasseter Region	19	Seal Mereenie Loop Road to better connect Watarrka & West MacDonnell National Parks	Existing	Extensive	Identified opportunity	High	Investment case
	20	Complete the sealing of the Outback Way and upgrade the wayside facilities and experiences	Existing	Extensive	Planned Activity	High	In progress
	21	Expand the quantity of Aboriginal cultural offerings and experiences	New	Concentrated	Identified opportunity	High	Market assessment
	22	Install and upgrade wayfinding signage across Region	Existing	Extensive	Identified opportunity	Medium - High	Include in Drive Market Strategy
	23	Develop specialist markets opportunities (i.e. education, conservation)	New	Broad	Identified opportunity	Medium	Market assessment
	24	Develop night time tourism experiences	Existing / New	Extensive	Identified opportunity	Low - Medium	Market and feasibility assessment
	25	Expand regional events including cultural festivals	Existing	Broad	Identified opportunity	Medium	Market assessment
	26	Enhance regional and remote art centre/Arts Trail product in the Region	Existing	Extensive	Planned	Medium	Planning, grants and funding initiatives
	27	Develop multi-day self drive options for the Region	Existing	Extensive	Planned	Low	In progress



Legend	Level of stakeholder support		Estimated scale of investment (\$AUD)	
Nature-based offerings	Concentrated	Local community, individual or single Govt. agency	High	+1 million
Aboriginal cultural offerings	Broad	Community + others, or multiple agencies	Medium	0.1 – 1 million
Drive – journey offerings	Extensive	Community, Govt., multiple agencies and/or industry	Low	0 – 100,000
History and heritage offerings				
Quality facilities				



*Dreamtime Escarpment – Kings Creek Station*







# Appendix B - Socio-economic profile

## Population profile

In 2016, the Lasseter Region had a population of 2,465 with a median age of 29, only slightly below the Northern Territory median age of 32 and the Australian median age of 38.<sup>40</sup> Census data shows that 25.7% of the population is Aboriginal, followed by 16.0% Australian and 14.8% English.<sup>40</sup>

Uluru-Kata Tjuta National Park contains a community called Mutitjulu which has a population of 400. The nearest township is Yulara, located 26km away. Roughly 90 percent of the population is Aboriginal, and the other common ancestry is Torres Strait Islander. The most common language spoken is Pitjantjatjara by roughly 40% of the population, with English spoken by 38% of the community.<sup>41</sup>

## Education

Educational attainment is slightly lower in the Region than the Northern Territory, with 11.0% reporting year 12 as the highest level of educational attainment, 14.1% with certificate III and IV, 6.6% with a diploma or advanced diploma, and 11.9% with a bachelor degree or higher. This is compared to 12.7% year 12, 16.5% certificate III or IV, 7.2% diploma or advanced diploma, and 17.1% bachelor degree or higher in the Northern Territory.<sup>40</sup>

## Labour force

At the 2016 Census, the Region had a labour force of 1,201 and an unemployment rate of 5.9%, lower than both the NT (7.0%) and Australia (6.9%).<sup>40</sup>

## Income

Median weekly household income in the Region was \$1,207, significantly lower than the NT's median weekly household income of \$1,983 and Australia's of \$1,438. However the median weekly rent is also significantly lower, at \$125 compared to \$315 for the Territory and \$335 for Australia.<sup>40</sup>

## Economic profile

Lasseter Region's GRP was \$176 million in the year ending in 2018, a 9.1% increase from the previous year.<sup>42</sup>

The top three industries of employment in the Region were accommodation (38.6%), travel agency and tour arrangement services (3.7%) and pubs, taverns and bars (3.1%).<sup>40</sup>

<sup>40</sup> Australian Bureau of Statistics, 2016 Census QuickStats: Petermann – Simpson.

<sup>41</sup> Australian Bureau of Statistics, 2016 Census QuickStats: Mutitjulu – Uluru.

<sup>42</sup> Austrade, Regional Tourism Satellite Account 2017-18: Lasseter

# Appendix C - Key location descriptions

## Uluru-Kata Tjuṯa National Park

Uluru-Kata Tjuṯa National Park contains a community called Mutitjulu which has a population of 400. The nearest township is Yulara, located 26km away. Roughly 90 percent of the population is Aboriginal, and the other common ancestry is Torres Strait Islander. The most common language spoken is Pitjantjatjara by roughly 40% of the population, with English spoken by 38%. Almost half the working population works in the accommodation industry, with other smaller percentages working in cafes and restaurants, and building and other industrial cleaning services.<sup>43</sup>

Uluru is one of Australia's most recognisable landmarks, at 348 metres high and roughly 550 million years old. Uluru was placed on the World Heritage List for natural values in 1987 and then for cultural values in 1994.<sup>44</sup> The Uluru-Kata Tjuṯa Cultural Centre provides information on the Park and the many activities conducted throughout as well as an introduction into Anangu culture.<sup>45</sup> Kata Tjuṯa offers walks into Walpa Gorge and a longer Valley of the Winds walk.

## Yulara

Yulara is a town of approximately 1100 located on the edge of the Uluru-Kata Tjuṯa National Park. It is approximately 450 km from Alice Springs and can be reached by car in roughly five hours. Yulara also contains the Ayers Rock Resort and Ayers Rock Airport (Connellan Airport) which provides the closest access to Uluru by air. Approximately one fifth of the population is Australian with another fifth being English. Other common ancestries including Irish, Scottish, and German. Accommodation employs approximately 50 percent of the working population, with other industries including travel agency and tour arrangement services, and food and beverage services.<sup>46</sup>

Yulara is the gateway to Uluru and its main industry is tourism, containing many accommodation options and tour activities to support the surrounding area.

## Kaltukatjara/Docker River

Kaltukatjara/Docker River is a remote Aboriginal community of approximately 300 residents. The community has Aboriginal and pioneering history value. The Kaltukatjara Art Centre displays local artist works.

## Mutitjulu

Mutitjulu is a closed Aboriginal community located adjacent to Uluru. Mutitjulu is home to the Anangu people.

## Watarrka National Park

Watarrka National Park is located 308 km from Alice Springs, it can be reached in roughly three and a half hours by car. It is located 273 km from Yulara, which can be reached by car in approximately three hours. Its main attraction is the Kings Canyon. Other attractions include Kathleen Springs and the Karrke Aboriginal Cultural Experience, where visitors can experience Aboriginal culture and learn about bush tucker, dot painting, and bush medicine and plants.

## Kings Canyon

Kings Canyon is located within the Watarrka National Park and is its main attraction. The iconic walking track called 'Rim Walk' is a 6 km circuit suitable for relatively fit travellers and takes approximately 3 – 4 hours. The Rim Walk leads to the Garden of Eden, a rock hole surrounded by rare plants, and the 'Lost City' the weathered domes. Helicopter scenic flights are an option to view the magnificent canyon from the air.<sup>47</sup>

## Kings Canyon Resort

Kings Canyon Resort is an oasis located in the Watarrka National Park and offers a broad range of accommodation, from camping to resort rooms.

<sup>43</sup> Australian Bureau of Statistics, 2016 Census QuickStats: Mutitjulu – Uluru. [https://quickstats.censusdata.abs.gov.au/census\\_services/getproduct/census/2016/quickstat/ILOC70200902?opendocument](https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/ILOC70200902?opendocument), (accessed 27 February 2020).

<sup>44</sup> Australian Government, Department of Agriculture, Water and the Environment, *World Heritage Places - Uluru-Kata Tjuṯa National Park*. <https://www.environment.gov.au/heritage/places/world/uluru>, (accessed 27 February 2020).

<sup>45</sup> Tourism NT: *Uluru / Ayers Rock*. <https://northernterritory.com/uluru-and-surrounds/destinations/uluru>, (accessed 27 February 2020)SSC70124?opendocument, (accessed 4 March 2020).

<sup>46</sup> Australian Bureau of Statistics, 2016 Census QuickStats: Yulara. [https://quickstats.censusdata.abs.gov.au/census\\_services/getproduct/census/2016/quickstat/SSC70302?opendocument](https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70302?opendocument), (accessed 27 February 2020).

<sup>47</sup> Tourism NT, Kings Canyon and Watarrka National Park <https://northernterritory.com/uluru-and-surrounds/destinations/watarrka-national-park>



## Kings Creek Station

Close to Kings Canyon and Watarrka National Park, Kings Creek Station offers unique accommodation, meals, and working station tour experiences to visitors.

## Erlunda

Erlunda is located on the intersection of the Stuart and Lasseter Highways. It is one of the locations linking Alice Springs to Uluru by road. It is approximately 200 km south of Alice Springs and can be reached by car in roughly two hours. From Erlunda it is approximately 270 km to Uluru, and can be reached by car in three hours. Its main attraction is the Erlunda Roadhouse which offers accommodation, fuel and food and beverage services for people travelling through the Region.

## Kulgera

Kulgera is a small country town with a population of 50 located on the Stuart Highway.<sup>48</sup> It is approximately 275 km from Alice Springs, and can be reached by car in roughly three hours. It is most famous for being 21 km from the border of South Australia. The Kulgera Roadhouse offers accommodation, fuel, food and beverage services. Kulgera is the turn off for Aputula/Finke along the Finke Road.

## Aputula/Finke

Aputula/Finke is a remote community of 192. It is approximately 460 km from Alice Springs on sealed roads and can be reached by car in roughly five hours. The 240 km, unsealed Ghan Heritage Road also connects Alice Springs and Aputula/Finke, however this road is 4WD accessible only. Approximately three quarters of the population is Aboriginal with other common ancestries including Australian and English. Top industries of employment include aged care residential services, primary education and local government administration. The main language, Yankunytjatjara, is spoken by approximately 60 percent of population.<sup>49</sup>

Aputula/Finke has a rich history originally settled as a railway town. The railway was later moved, resulting in services moving with it. One of the attractions in recent times is the annual Finke Desert Race which is held in June and is considered one of the world's most premier rally events. During this time large numbers of tourists flock to the Aputula/Finke community to compete and watch the event.<sup>50</sup>

## Old Andado

Old Andado is a Homestead located approximately 580 km from Alice Springs, and can be reached by car in roughly six and a half hours. Old Andado Homestead and the associated meat house and saddle shop are evidence of the establishment of pastoral activities in past eras.<sup>51</sup> Old Andado Homestead is listed on the Northern Territory Heritage Register.<sup>52</sup>

## Titjikala/Maryvale

Titjikala/Maryvale is small community of 227 located approximately 120 km from Alice Springs. It can be reached by car in roughly one hour and 45 minutes. Approximately 70 percent of the population is Aboriginal with other significant common ancestry including Australian and English. Top employment industries include local government administration and aged care residential services. The main language is Yankunytjatjara which is spoken by 55% of the population. Other languages include Luritja, Arrernte and Eastern Arrernte.<sup>53</sup>

Located in Titjikala/Maryvale is Tapatjaka Art and Craft with a purpose-built gallery with paintings, ceramics, jewellery, prints and punu (wooded artefacts) from emerging and well-known Aboriginal artists.<sup>54</sup>

## Curtin Springs

Curtin Springs covers over one million acres of land in Lasseter. It is located on the Lasseter Highway approximately 100km east of Uluru. Curtin Springs is a family owned and run homestead offering visitor experiences including engagement with an active cattle station, wayside inn, paper mill; art and tours, and guided walking tours.<sup>55</sup>

<sup>48</sup> Australian Bureau of Statistics, Census 2006

<sup>49</sup> Australian Bureau of Statistics, 2016 Census QuickStats: Finke. [https://quickstats.censusdata.abs.gov.au/census\\_services/getproduct/census/2016/quickstat/SSC70099](https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70099), (accessed 5 March 2020).

<sup>50</sup> Remote Area Health Corps (RAHC), Community Profile Finke (Aputula). [https://www.rahc.com.au/sites/default/files/documents/community\\_profiles/Aputula%20Community%20Profile.pdf](https://www.rahc.com.au/sites/default/files/documents/community_profiles/Aputula%20Community%20Profile.pdf), (accessed 5 March 2020).

<sup>51</sup> Tourism NT: *Old Andado Station*. <https://northernterritory.com/alice-springs-and-surrounds/see-and-do/old-andado-station>, (accessed 5 March 2020).

<sup>52</sup> Heritage Register: *Old Andado Station*. [http://www.ntlis.nt.gov.au/heritageregister/f?p=103:302::NO::P302\\_SITE\\_ID:113](http://www.ntlis.nt.gov.au/heritageregister/f?p=103:302::NO::P302_SITE_ID:113), (accessed 5 March 2020).

<sup>53</sup> Australian Bureau of Statistics, 2016 Census QuickStats: Titjikala. [https://quickstats.censusdata.abs.gov.au/census\\_services/getproduct/census/2016/quickstat/SSC70260](https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70260), (accessed 5 March 2020).

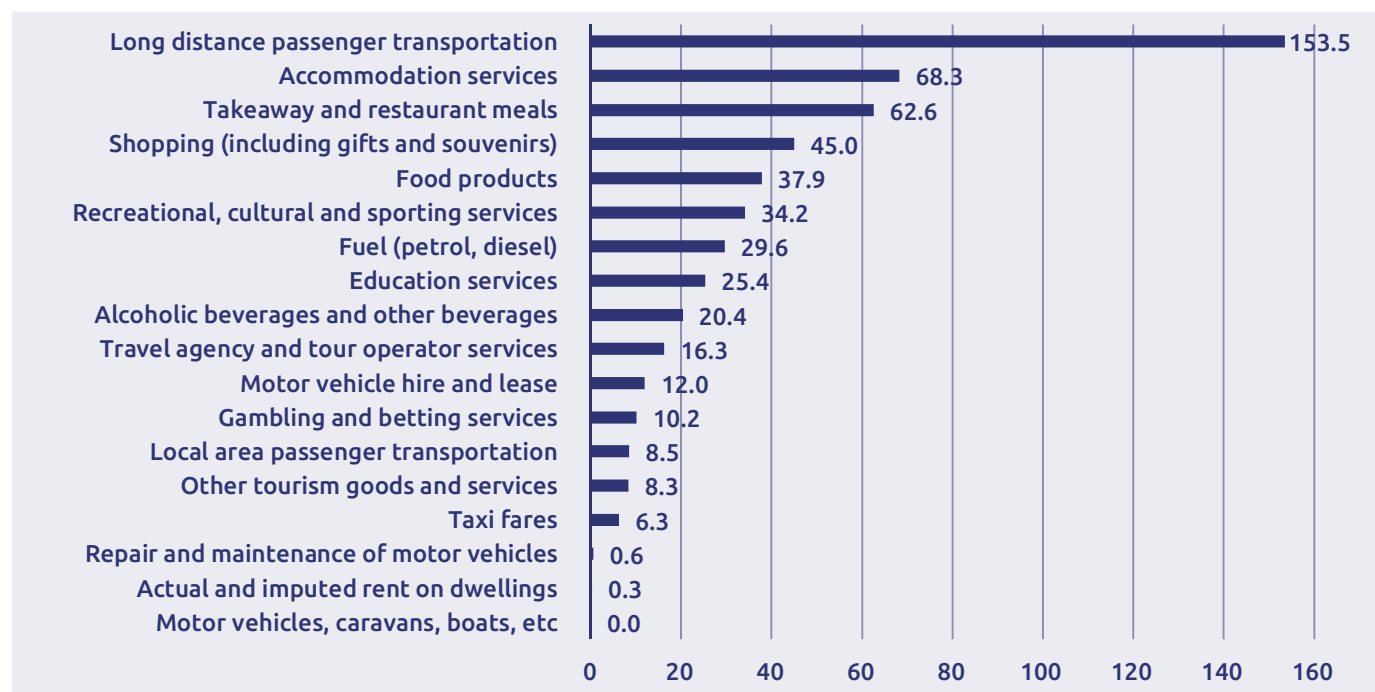
<sup>54</sup> Tourism NT: *Tapatjaka Art and Crafts*. <https://northernterritory.com/alice-springs-and-surrounds/see-and-do/tapatjaka-art-and-crafts>, (accessed 5 March 2020).

<sup>55</sup> <https://www.curtinsprings.com/>

# Appendix D - Lasseter Region visitor market

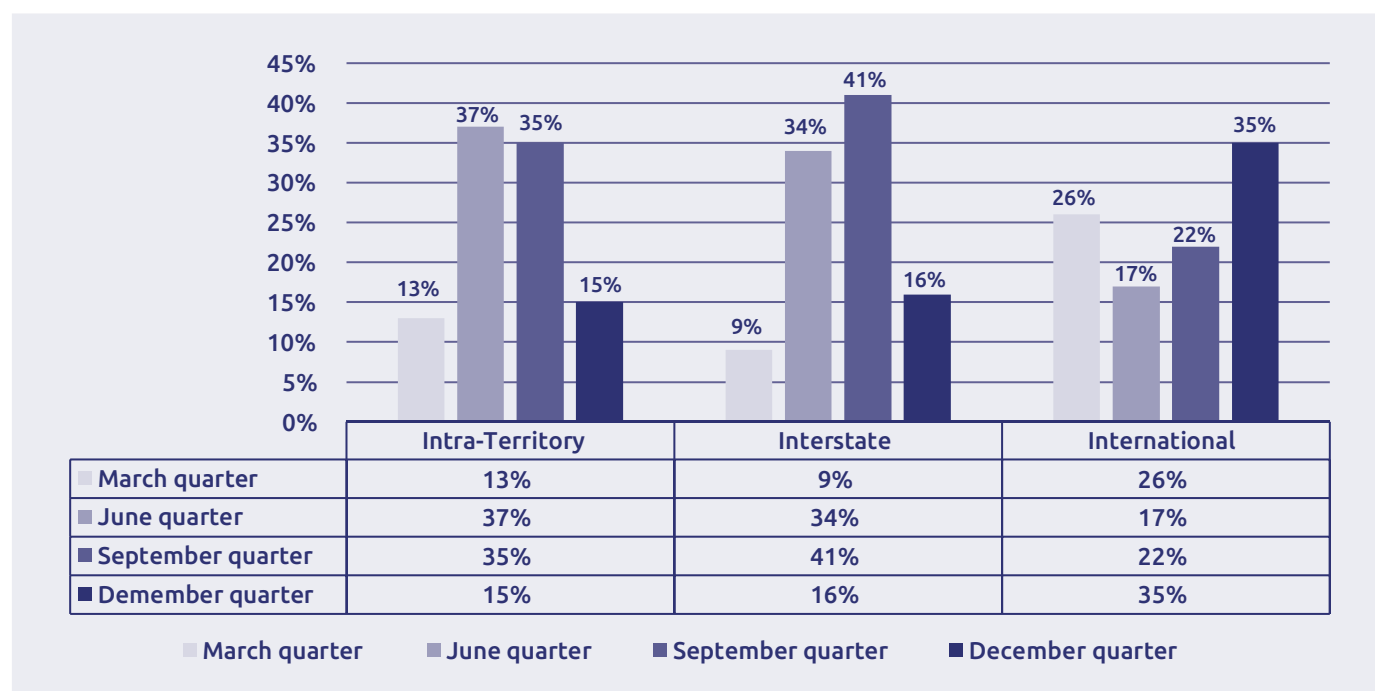
The following charts summarise tourism in the Region.

**Figure 4 - Tourism consumption in Lasseter Region 2017/18 (\$ million)**



Source: Tourism Research Australia, *Regional Tourism Satellite Account 2017-18*

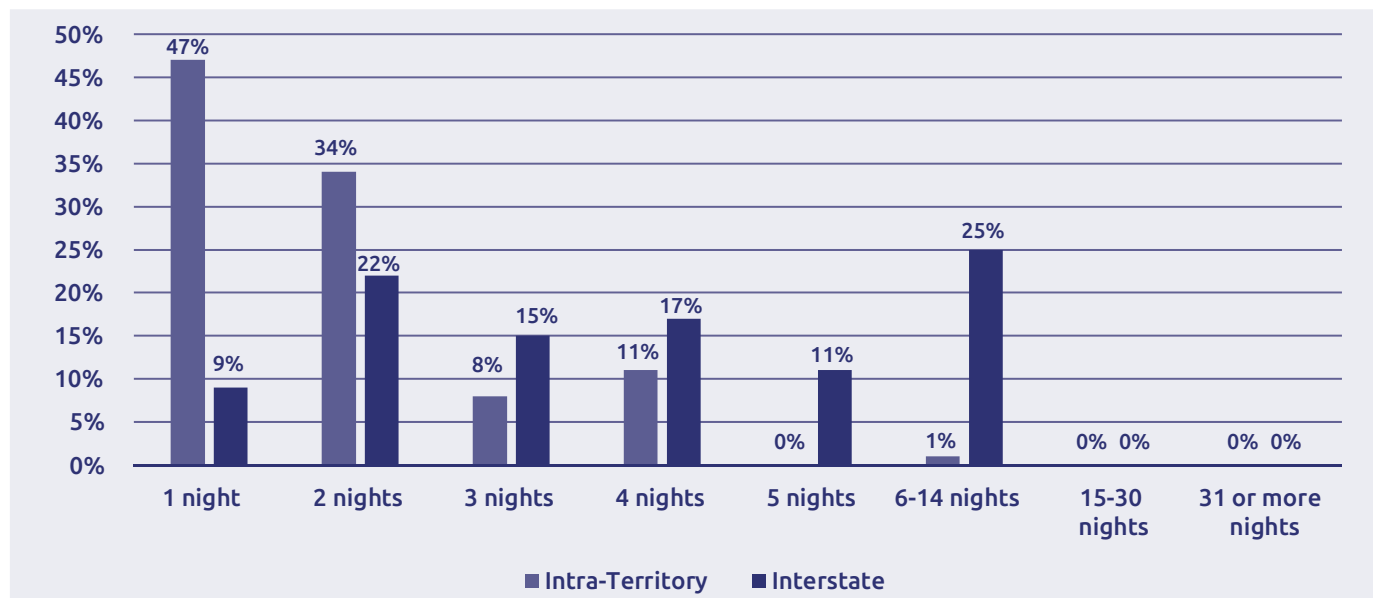
**Figure 5 - Visitation by quarter, three year average YE 2016 - 18**



Source: Tourism NT, Regional Profile: *Lasseter, YE June 2016-2018*

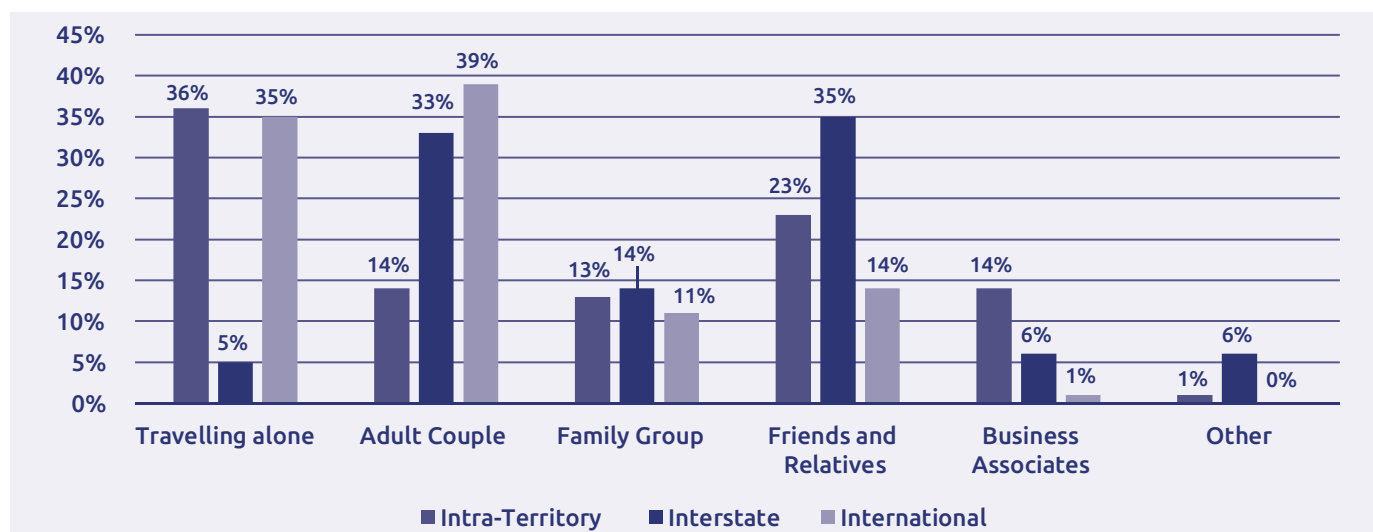


**Figure 6 - Length of stay, domestic drive market**



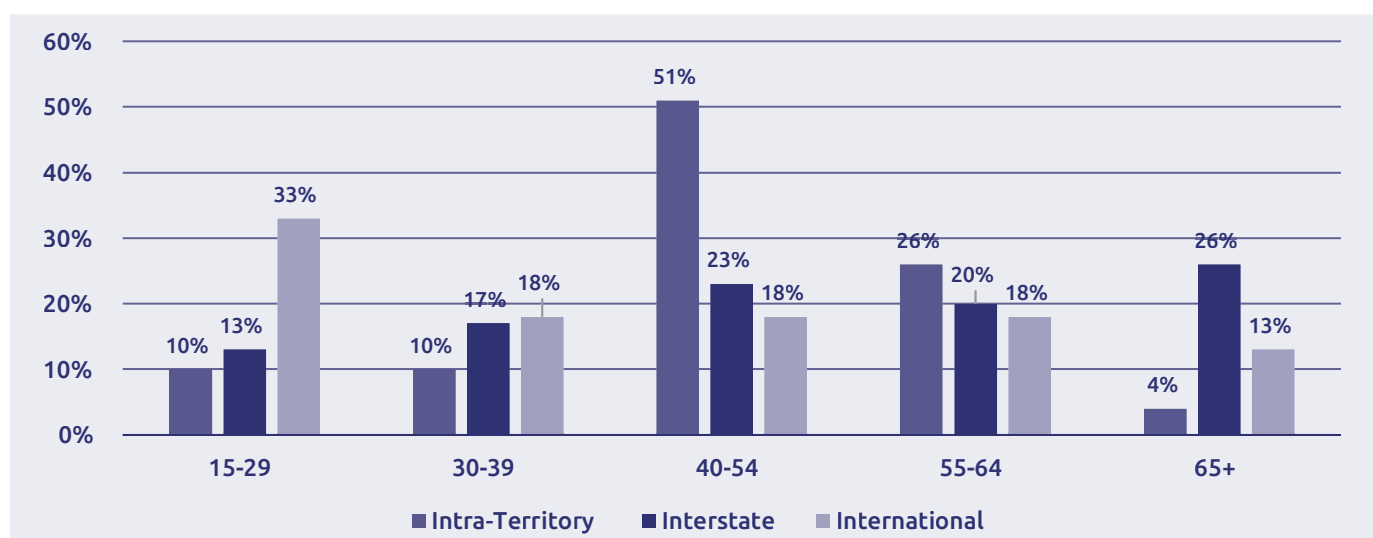
Source: Tourism NT, Regional Profile: *Lasseter*, YE June 2016-2018

**Figure 7 - Visitation by travel party type, three-year average YE June 2016-2018**



Source: Tourism NT, Regional Profile: *Lasseter*, YE June 2016-2018

**Figure 8 - Visitation by age group, three-year average YE June 2016-2018**



Source: Tourism NT, Regional Profile: *Lasseter*, YE June 2016-2018

# Appendix E - Tourism development planning in the Lasseter Region

Destination management requires alignment and collaboration across the public, private and community sectors. It involves stakeholders from the tourism sector as well as stakeholders from all sectors contributing to the experience of a destination. The DMP for the Region works to build on and harness the collective action of the Region to enhance tourism outcomes.

## Tourism industry development

### NT's Tourism Industry Strategy 2030

Tourism NT developed the *NT's Tourism Industry Strategy 2030* (the Strategy) to guide tourism development across the Territory for the next ten years. The Strategy was co-developed with industry and government and includes six priority objectives:

1. Grow investment in the Northern Territory's remarkable assets, product and regions
2. Strengthen and showcase the Northern Territory's distinctive Aboriginal cultural tourism experiences
3. Through strategic marketing activities, grow the value of the holiday market in the Northern Territory
4. Leverage and build events to drive visitation
5. Develop ongoing access to and within the Northern Territory
6. Increase recognition of the value of tourism to the Northern Territory.

These objectives are underpinned by four pillars:

- Marketing
- Industry development
- Workforce development
- Collaboration across industry and government.

The Strategy provides a plan, with actions and outcomes associated with each priority objective. To ensure the Strategy remains relevant through to 2030, regular reporting and review exercises have been outlined including an annual report card, three-yearly reviews, and flexible target ranges. The Strategy's core objective is to achieve sustainable growth in tourism across the Territory, fostering inclusive growth throughout the industry, and across regions, sub-sectors and markets.

### NT Aboriginal Tourism Strategy 2020–2030

Tourism NT with the NT Aboriginal Tourism Advisory Council have developed the *NT Aboriginal Tourism Strategy 2020 – 2030* to guide the development of Aboriginal tourism in the NT toward the vision for the NT to be the undeniable leader in the Aboriginal tourism sector.

The Strategy sets out an approach to development of the sector through a focus on building the five key pillars of:

1. Living cultures – respectfully sharing our culture with others will foster improved understanding and promote our cultures for future generations
2. Living communities – strengthen knowledge and understanding in Aboriginal people and across networks
3. Living lives - nurturing skills and developing support tools to create better business, jobs and industry success
4. Living landscapes – providing better access and services to destinations by developing improved infrastructure with partners
5. Living interactions – providing better communication, engagement and monitoring our connections with visitors and our industry.

An annual report and three yearly reviews will support the delivery of the *NT Aboriginal Tourism Strategy 2020-2030*.

### Turbocharging Tourism Initiative

In 2018 the NT Government committed \$5.7 million through the Turbocharging Tourism initiative towards walking and cycling experiences and options at Watarrka National Park. Investigations continue into the feasibility of a multi-day walking trail including accommodation in Watarrka National Park.



## Tourism infrastructure

The Department of Infrastructure, Planning and Logistics (DIPL) plays a key role in tourism development as it brings together the key functions that drive land use, infrastructure and transport. In its *10 Year Infrastructure Plan 2019-2028*, DIPL lists a number of projects that will benefit tourism throughout the Region:

- Ayers Rock Airport at Yulara upgrades including runway, taxiway, apron and runway lighting
- New multi-day walking tracks through the Region
- Expand visitor accommodation the remote Region.

These projects are specifically for the benefit of tourism in the Region, with the goals of further developing and expanding the tourism industry, expanding tourism products to develop the economy and increase liveability, and promoting Aboriginal tourism.

## Park management plans

Parks and conservation reserves form a significant component of the tourism experience in the Region. Various park management plans exist in the Region, identifying a variety of intents and priorities depending on the stakeholder involved in the plan. The plans highlight the delicate balance between the management of Parks and stakeholder values in conjunction with growing tourism in the Region. The development of Joint Management Plans across the Region points to the important role traditional landowners have in the co-management of Parks.

The Region's Park management plans have been outlined to provide an overview of the approach to park management in the Region. The plans include:

- Uluru-Kata Tjuta National Park Management Plan
- Watarrka National Park Joint Management Plan.

The *Uluru-Kata Tjuta National Park Management Plan* was developed by the Uluru-Kata Tjuta National Board of Management in 2010. The plan sets out how the Park will be managed for 10 years finishing in 2020.

The issues addressed in the Plan aim to:

- Keep Tjukurpa strong and look after the health of country and community
- Help Uluru-Kata Tjuta National Park to become known as a place of learning, knowledge, and understanding about culture, country and custom
- Ensure a strong future for Anangu in the management of the park and ensure Anangu benefit from the existence of the park
- Protect World Heritage natural and cultural environments of the park in harmony with Australian social and economic aspirations.<sup>56</sup>

The *Watarrka National Park Joint Management Plan* was developed by the Parks and Wildlife NT of the Northern Territory and the Traditional Owners in July 2018. The Plan's priorities are:

- Making joint management work: meeting the needs of Traditional Owners to maintain their connection to country and to benefit from joint management arrangements
- Looking after country and culture: protecting the outstanding natural and cultural values of the Park
- Visitor experiences: providing a range of exciting, authentic and engaging experiences for visitors and ensuring the Park continues as a key tourist attraction and driver of the Region's economy.<sup>57</sup>

<sup>56</sup> Uluru-Kata Tjuta Board of Management, *Uluru-Kata Tjuta National Park Management Plan 2010-2020*.

<sup>57</sup> Parks and Wildlife Commission of the Northern Territory, *Watarrka National Park Joint Management Plan*

## Council regional plans

Much of the Region falls under the MacDonnell Regional Council, with exclusion of Yulara and Mutitjulu communities. The *MacDonnell Regional Council Strategic Plan* incorporating the 2019-2020 Regional Plan discusses the connection between tourism and Aboriginal economic development, including as a mechanism to support employment outcomes. Actions listed in the plan that support tourism in the Region include:

- Develop a regional tourism plan in collaboration with Tourism NT
- Develop and implement Council Community Infrastructure Plans to guide infrastructure investment and development
- Provide quality parks, open spaces, sporting and recreational facilities that are accessible for all ages
- Provide in-kind support for community and cultural events
- Support the development of an annual major regional cultural festival within the Council area.

## Key findings

Exploration of the tourism and destination development plans impacting the Region highlight the broad range of stakeholders involved in the development of tourism in the Region.

The plans also highlight the important role of the large tourism operators, Voyages Indigenous Tourism Australia and Delaware North play in the development of the Region; being responsible for significant infrastructure developments in the Region, which are addressed in this chapter.

The scale of the developments supported by Voyages and Delaware North highlight the importance of coordinated and collaborative development efforts in the Region; the lack of development outside of these areas also points to the harshness of the Region and difficulties in the delivery and development of tourism initiatives in the Region.

Tourism development activities in the Region are supported by the overarching *NT's Tourism Industry Strategy 2030* identifying priorities for the industry to 2030, and the *NT Aboriginal Tourism Industry Strategy 2020-2030*.

Another significant strategy assisting industry development efforts in the Region is the *DIPL 10 Year Infrastructure Plan 2019-2028*.

Complementing these high-level plans are operational plans for the management of Parks, community level plans developed by the Regional Council, and the plans implemented by operators in the Region. These plans all support local infrastructure development, resource allocation and coordination of collective action focused on growing regional and tourism outcomes. All of the plans highlight the significant opportunity that exists through coordinated planning and investment in the Region.









# Appendix F - Accessible tourism

Accessible tourism focuses on ensuring tourism destinations, products and services are accessible to all people, regardless of their physical limitations, disabilities or age.<sup>58</sup>

Tourism infrastructure that is accessible is also beneficial to a broad range of stakeholders recognising that support needs span across those travelling with prams, seniors with mobility requirements, and people with permanent or temporary disabilities.

## Accessibility considerations

The size of the populations of people living with a disability is significant, and warrants consideration as to how this cohort can best be engaged in tourism. Globally, one billion people are living with a disability and in Australia, one in five people have a disability, representing 4.3 million people, or roughly 18% of the population.<sup>59</sup> These figures are compounded by an increasing prevalence of persons with a disability, as the population ages and chronic diseases spread.<sup>60</sup> It is estimated that by 2050, over one quarter of the population will be over age 65, a factor creating greater demand for mobility access.

In Asia, one of the NT's closest geographic partners, 650 million people have a disability.<sup>61</sup> Of these, 85 million are in China<sup>62</sup> and 7.5 million are in Japan.<sup>63</sup> With Asian countries accounting for just under half of international visitors to Australia,<sup>64</sup> and Japan and China being the fourth and fifth biggest source markets in the NT respectively,<sup>65</sup> this is a notable population cohort.

The size and growth trends of the population requiring greater accessibility offers a significant social and economic basis for investment in accessibility strategies, and approaches to supporting and engaging this market cohort.

## Accessibility in the NT

In the Territory, several initiatives have been undertaken to contribute to accessible tourism, however there is not yet an overarching strategy or comprehensive plan to address accessibility in tourism in the NT, establishing an opportunity for the NT to better engage the cohort of travellers with accessibility needs.

Identified accessibility initiatives in the NT include:

- Tourism Top End accessibility guide
- Accessible Beaches review
- City of Darwin Access and Inclusion Plan 2019-2022
- The Accessible Point to Point Transport Working Group.

Tourism Top End has developed an accessibility guide for Darwin, which contains information about various sites around the city which are accessible. It contains where to find disability services, medical and emergency services, and transport options.

Accessible Beaches has undertaken reviews of access and inclusion at the Darwin Waterfront, Casuarina Beach, Mindil Beach, and Nightcliff Beach. The objectives of the reviews were to:

- Identify current user experience at the reviewed locations
- Identify opportunities to improve accessible and inclusive facilities at the reviewed locations
- Provide a report outlining findings and general recommendations.

Additionally, *City of Darwin's Access and Inclusion Plan 2019-2022* provides a framework to continue to support people with disabilities and other access challenges. The plan looks at four key areas:

- Built and natural environment
- Services and programs
- Information and communication
- Council operations.

The Department of Infrastructure, Planning and Logistics (DIPL) has established the Accessible Point to Point Transport Working Group, a Territory-wide accessibility initiative. The group was established to examine and provide recommendations to improve point to point transport services delivered to persons in wheelchairs.

<sup>58</sup> Tourism Australia, *Accessible tourism*

<sup>59</sup> Australian Institute of Health and Welfare, *People with Disability in Australia*.

<sup>60</sup> World Health Organisation, *World Report on Disability*.

<sup>61</sup> United Nations, *Disability in Asia and the Pacific: The Facts*.

<sup>62</sup> Sixth Tone, *Invisible Millions: China's Unnoticed Disabled People*.

<sup>63</sup> Disabled World, *Disability in Japan: Overview and Statistics*.

<sup>64</sup> Tourism Research Australia, *International Visitor Survey YE September 2019*.

<sup>65</sup> Northern Territory Department of Treasury and Finance, *Northern Territory Economy: Tourism*.



## Potential scope of the accessibility market

The potential scope of the accessibility market presents both an important social, and economic opportunity for the Territory. It is estimated that 1.3 million Australians with disabilities travel each year. When considering that many people with a disability travel with a carer, (resulting in a multiplier of 2.45 (overnight) or 2.62 (day trips)), an estimated 3.4 million people are travelling with accessible travel needs.<sup>66</sup>

In addition to the significant size of the accessible tourism market, Tourism Research Australia estimates that domestic tourists with a disability spend \$3.2 billion annually.<sup>67</sup>

## Accessible tourism product needs

Current statistics indicate that people with disabilities travelled almost as frequently as people without disabilities.<sup>68</sup> Of the cohort of travellers with a disability almost a quarter (24%) had taken an overseas trip, indicating that distance of travel from home is not always a barrier to this cohort.

Travability's report *Understanding the Opportunity for Australia in Accessible Tourism* demonstrated that among those travelling with a disability, mobility (difficulty moving more than a short distance) was the most common access challenge (representing 44% of those surveyed). In addition, the survey highlighted that a person experiencing a disability will often face multiple challenges, requiring tourism accessibility consideration to address the spectrum of mobility, vision, hearing or cognitive access impairments.

While there are differences in accessibility needs, the activities that travellers with a disability participate in are very similar to the activities that travellers without a disability participate in. Table 8 demonstrates the similarity between cohorts with and without a disability, showing that the demand for products is very similar. This indicates the need for tourism operators to attract the accessible tourism market by addressing accessibility requirements in many of the Region's existing tourism offerings.

**Table 8 - Top activities for travellers with a disability compared to the general population**

Activity	Identify with disability	Do not identify with disability	Total
Eat out /dine at a restaurant /cafe	62%	63%	63%
Visit friends and relatives	53%	45%	46%
Go to the beach	25%	31%	30%
Sightseeing /looking around	25%	24%	24%
Go shopping for pleasure	25%	20%	21%
Pubs, clubs, discos etc.	23%	22%	22%
Visit national parks / rainforest walks	11%	11%	11%
Go to markets	10%	8%	9%
Bushwalking /rainforest walks	9%	12%	11%
Picnics or BBQs	8%	7%	7%
Visit museums or art galleries	7%	6%	6%
Fishing	7%	7%	7%
Go on a day trip to another place	6%	6%	6%
Exercise, gym or swimming	6%	8%	8%
Visit history /heritage buildings, sites or monuments	6%	5%	5%
Play other sports	4%	3%	3%
Water activities /sports	4%	6%	6%
Visit wineries	4%	4%	4%
Attend festivals /fairs or cultural events	4%	4%	4%
Visit botanical or other public gardens	3%	4%	4%
Visit food markets (2016 onwards)	3%	2%	2%
Attend movies /cinema	3%	3%	3%

Source: Travability, *Understanding the Opportunity for Australia in Accessible Tourism*.

<sup>66</sup> Travability, *Understanding the Opportunity for Australia in Accessible Tourism*.

<sup>67</sup> Tourism Research Australia, 2018, *Accessible Tourism in Victoria and Queensland*.

<sup>68</sup> Travability, *Understanding the Opportunity for Australia in Accessible Tourism*.

## Other accessible tourism needs

A Tourism Research Australia study of accessible tourism in 2017<sup>69</sup> identified the specific needs of the accessible tourism market focused heavily on information and support services, including:

- Information
- Planning
- Service
- Facilities and transport.

In the study travellers with a disability listed more detailed information as their highest priority. These travellers require information that is related to their disability, easy to find, well-structured, and relatable.

Despite this being a priority, currently no central service is available to tourists seeking advice on accessible tourism options in the NT or the Region. As a result, prospective visitors with accessibility needs are required to enquire directly with providers. Presenting a significant barrier to attracting travellers with a disability to the Region, with the study finding that “if this information isn’t widely publicised, the visitor may choose to avoid the area. Not knowing if a hotel has accessible rooms may mean they avoid particular hotels or destinations more broadly.”<sup>70</sup>

An opportunity exists for a regional and Territory wide approach to collating accessible tourism information and communicating this to the visitor market. According to *Travability’s Understanding the Opportunity for Australia in Accessible Tourism*, travellers with a disability said they want:

- Information contained on review sites such as Tripadvisor that is relevant to their specific needs
- Specialised review sites for their needs
- Accreditation that shows businesses have made the commitment to accessible travel.

In addition to information, personal contact with a business or destination was more likely to convert interest to visitation, as were travel agents with a strong service ethic who could inspire travel when the travellers don’t actually know what is possible.<sup>71</sup>

In addition to the availability of relevant information, travellers with a disability face challenges regarding attitudes and understanding from tourism and hospitality staff. This was particularly prevalent among young travellers with a disability and those with a ‘hidden disability’ whose disability may not be easily obvious.

Education and customer service campaigns for tourism operators in the Region may help to address these barriers and deliver the personal service that converts interest to visitation amongst this cohort of travellers.

Cost was another important factor for travellers with a disability, who mostly need to travel with a carer, making the cost of travel higher than others. Assistance with these costs or special deals for those travelling with a carer could assist in removing these barriers.<sup>72</sup>

Facilities and transport are additional barriers to travellers with a disability. Improvements in practical information such as location of toilets, lifts, accessible toilets, more prominent information on tourism websites, better public transport access, better access at airports, and a better range of accommodation are

## Key considerations

A sizable proportion of the Australian and global population experiences a disability, and with a growing prevalence there is both a significant social justice and economic imperative to work towards delivering accessible tourism for all. Evidence from some states in Australia shows that travellers with a disability comprise on average 10% of the domestic market spend.

Currently no strategic approach to accessible tourism exists in the NT or the Region, resulting in a gap in the tourism offering, and an opportunity for further development of the tourism industry.

Notably travellers with a disability are seen to participate in similar activities to persons without a disability, and at a similar rate of participation. This indicates the ability to meet the needs of this market, through making existing experiences and facilities in the Region accessible.

The prioritisation of information about accessibility offerings by the accessible traveller, indicates that the focus of efforts to build accessible tourism in the Region should include enhancing the scale of accessibility offerings in the Region and collation and communication of accessibility offerings in the Region. Further to localised action, an opportunity exists for accessible tourism efforts to be scaled across the NT.

<sup>69</sup> Tourism Research Australia, 2018 *Accessible Tourism in Victoria and Queensland*.

<sup>70</sup> Tourism Research Australia, *State of the Industry 2018-19*.

<sup>71</sup> Travability, *Understanding the Opportunity for Australia in Accessible Tourism*.

<sup>72</sup> Travability, *Understanding the Opportunity for Australia in Accessible Tourism*.

<sup>73</sup> Travability, *Understanding the Opportunity for Australia in Accessible Tourism*.





*Four-wheel driving the Binns Track – Lasseter Region*





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