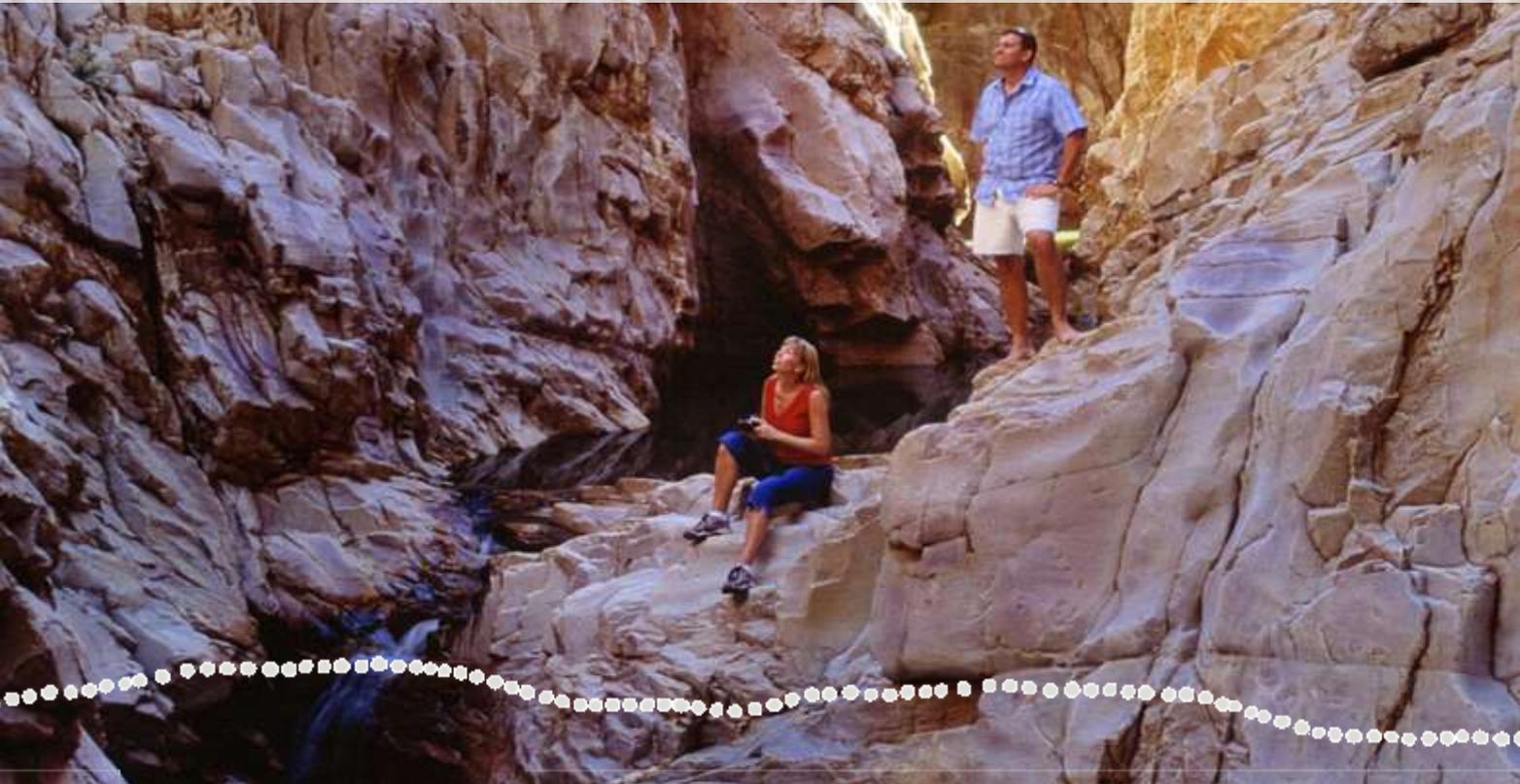


Australia's Red Centre National Landscape

Experience Development Action Plan



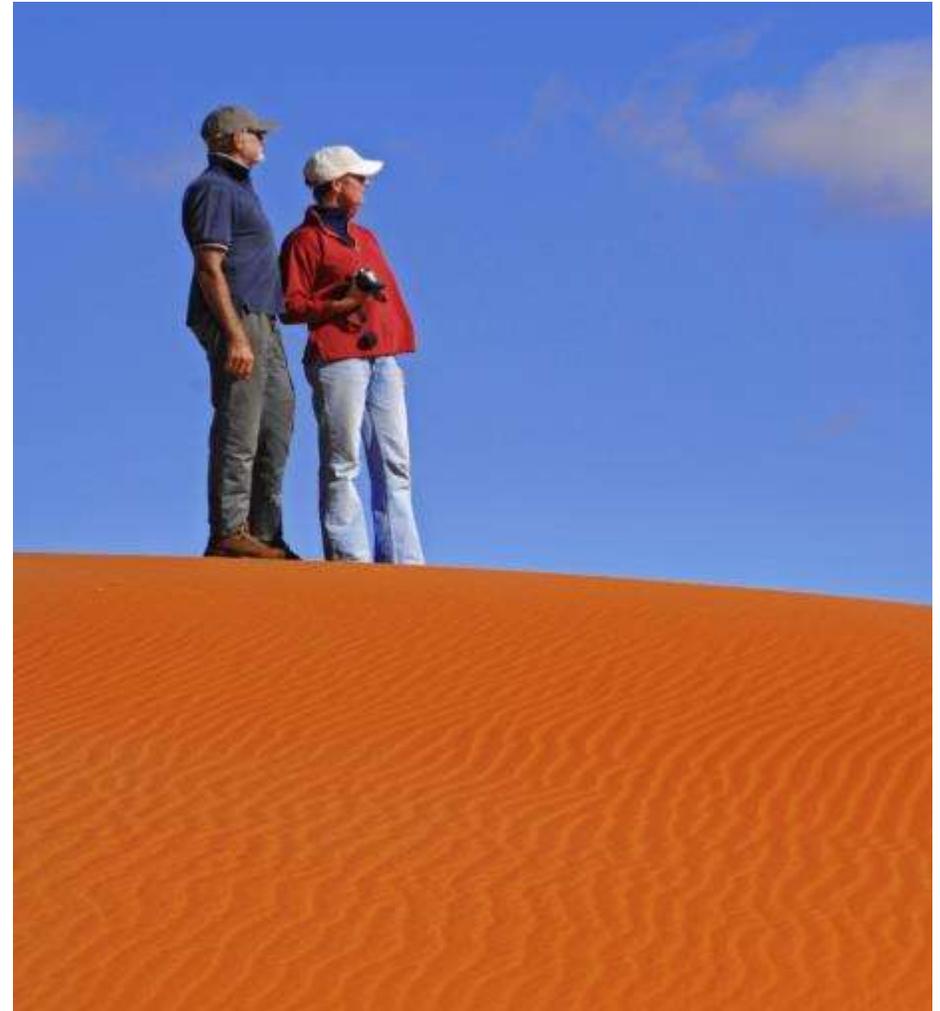
May 2013

ACKNOWLEDGEMENT

This Experience Development Action Plan has been developed through the National Landscapes program with the support of Tourism Northern Territory, Northern Territory Government Agencies, the Department of Resources, Energy and Tourism, Tourism Australia, Parks Australia and the Australia's Red Centre National Landscapes Steering Committee – funded by the T-QUAL Program.



Australian Government
Department of Resources, Energy and Tourism



EXECUTIVE SUMMARY

Australia's Red Centre National Landscape is a collaboration of tourism, community and conservation to attract high-yielding international experience seekers to the Red Centre of the Northern Territory through engaging story-telling and supporting new product development.

The opportunity exists to shift out-dated perceptions of the region with new products and experiences that will get the world talking and position the destination as a 'must-see' natural and cultural tourism experience once again.

This Experience Development Action Plan identifies the hero tourism experiences and the Priority Projects considered most likely to provide the region with a point of difference against its national and international competitors, for the 'Experience Seeker'.

Tourism Australia's 'Experience Seekers' are Australia's highest yielding international market segment and the target market identified for the National Landscapes program. 'Experience Seekers' are looking for natural encounters, adventurous journeys, local flavours and life changing moments, this segment is a perfect match for the products, activities, experiences and brand values of Australia's Red Centre National Landscape. The identified Priority Projects seek to deliver on these needs, while leveraging the landscape's Hero Experiences.

By matching the needs of the 'Experience Seeker' and the tourism offerings of our competitors against the key themes identified through the National Landscape positioning work, it is possible to identify the Hero Experiences of Australia's Red Centre

The key Hero Experiences for Australia's Red Centre include:

- Get the best vantage point to watch the ancient cinema of light and rock bringing a vast landscape to life each day
- Get to know the locals and see how they have adapted to the landscape

These Hero Experiences are enhanced by a number of supporting experiences including:

- Adventure through ancient caves and escarpments to get a unique view of the landscape where you can have a safe adventure that gives you something to talk about that not everyone does.
- Leave the worries of the world behind on a journey to remember through an awe-inspiring landscape
- Place your trust in ancient knowledge as you trek across the landscape

Building on the comprehensive stakeholder engagement, both in the development of the Australia's Red Centre Positioning Guidebook and in preparing this EDAP, the Steering Committee have agreed on a clear direction for Australia's Red Centre. That direction is based on seeing the identified hero experiences (above) come to life for visitors.

EXECUTIVE SUMMARY

For this to occur, two things must happen - the Priority Projects (below) that support each Hero Experience, identified through the consultation and agreed through the Steering Committee and agency consultation, need to be implemented for each Experience to be delivered to an international standard.

Supporting the Priority Projects are a set of enablers which support the overall implementation of the EDAP. As the Priority Projects, including a number of catalyst projects and the identified emerging opportunities, are implemented the Experience Seeker will see the essence of the destination positioning and the vision come to life.

The Priority and Supporting Actions have been considered based on the 'Hero Experience' or the 'Supporting Experiences' that they work to support.

Hero Experience #1: Get the best vantage point to watch the ancient cinema of light and rock bringing a vast landscape to life each day.

- Create a commercially appropriate foundation for ballooning near the rock (*Priority Project #1*)
- Build new tented accommodation in close proximity to the Ormiston Gorge (*Priority Project #2*)
- Build new exclusive accommodation in close proximity to the West MacDonnell Ranges National Park (*Supporting Project*)
- Develop greater tourism infrastructure in the West MacDonnell Ranges National Park (*Supporting Project*)

Hero Experience #2: Get to know the locals and see how they have adapted to the landscape

- Events support and development program (*Priority Project #3*)
- An Endangered Species Revival and Awareness Centre in or near Uluru-Kata Tjuta National Park (*Priority Project #4*)
- Grow new wildlife voluntourism opportunities (including night activities) linked to business events (*Supporting Project*)
- develop an iconic Australian Indigenous tourism experience (*Supporting Project*)
- Upgrade the Uluru- Kata Tjuta National Park National Park Cultural Centre (*Supporting Project*)

Supporting Hero Experiences:

Adventure through ancient caves and escarpments to get a unique view of the landscape where you can have a safe adventure that gives you something to talk about that not everyone does.

Leave the worries of the world behind on a journey to remember through an awe-inspiring landscape

Place your trust in ancient knowledge as you trek across the landscape

- Develop a world famous Mountain Bike track and event near Alice Springs or the West Macs (*Priority Project #5*)
- Ilpurla Multi-day Accommodated Walk (*Priority Project #6*)
- A multi-day accommodated walk in or near Uluru- Kata Tjuta National Park (*Supporting Project*)
- Develop product for Homeland Visits and Associated Tourism Hub (*Supporting Project*)

EXECUTIVE SUMMARY

The following projects have been identified as investment catalysts for the region. It is anticipated that public sector investment in these projects would facilitate the development of strong private sector investment.

- Mountain bike track and event co-ordination
- Ormiston Gorge tented accommodation
- Ilpurla multi-day walk management infrastructure

In addition the site visit identified a number of enablers including:

- A clear role for industry: Using Australia's Red Centre National Landscape as a lobbying tool.
- Investment in telecommunications infrastructure
- The sealing of the Red Centre Way Inner Loop Retaining air access into the region through supportive marketing, incentivizing, and ongoing discussions with airlines.
- A more comprehensive training program potentially linked to an Australia's National Landscapes training and education package.
- The NT Government, Commonwealth Government and the Central Land Council need to support new ventures by providing timely decisions with clear justifications.
- Support the continuation of a robust tourism workforce in the Red Centre

To support the efforts of the stakeholders in Australia's Red Centre to see the Catalyst Project progressed a Market Sounding document has been prepared and distributed to national and international investors seeking their level of interest in the projects in order to better understand the next steps required.

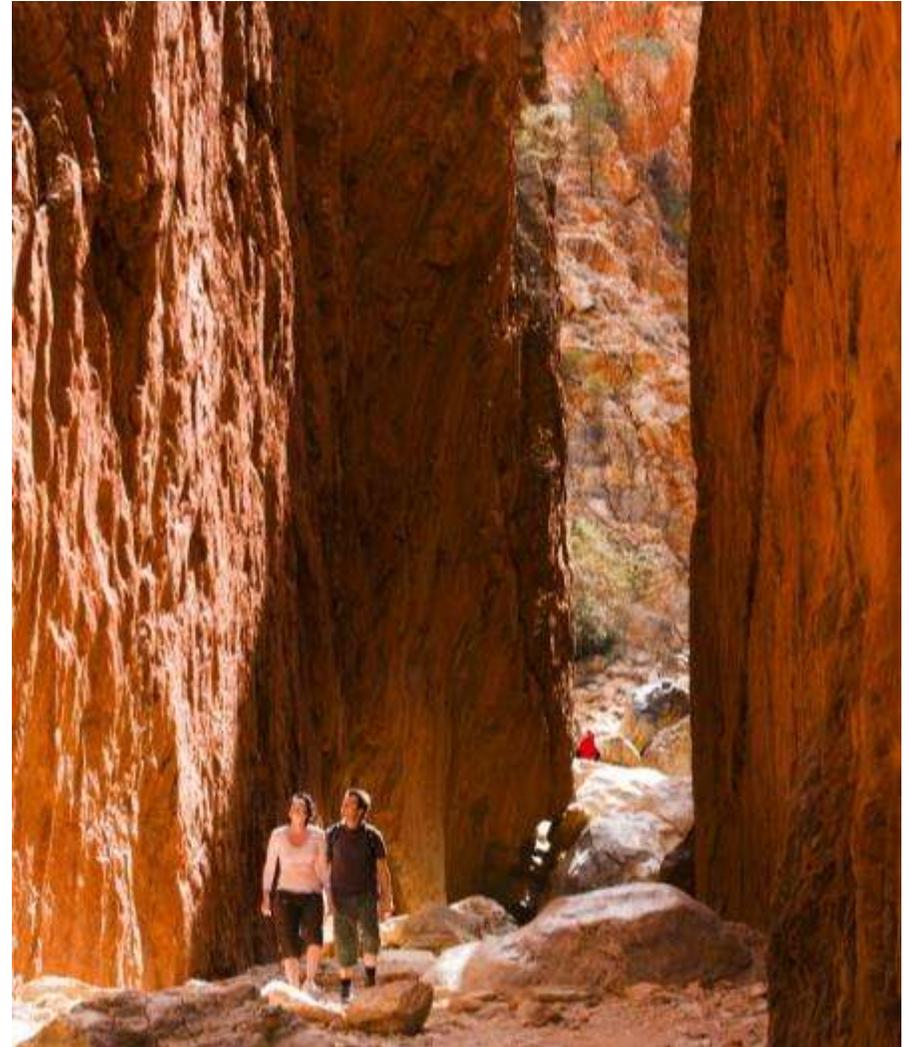


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ACRONYMS

EDAP	Experience Development Action Plan
ARC	Australia's Red Centre
NL	National Landscape
USP	Unique Selling Point
RPT	Regular Passenger Transport
UKTNP	Uluru – Kata Tjuta National Park
TCA	Tourism Central Australia
TO	Traditional Owner

Disclaimer

Any representation, statement, opinion or advice, expressed or implied in this document is made in good faith but on the basis that EC3 Global and Middle Star are not liable (whether by reason of negligence, lack of care or otherwise) to any person for any damage or loss whatsoever which has occurred or may occur in relation to that person taking or not taking (as the case may be) action in respect of any representation, statement or advice referred to in this document.



Images of the Red Centre region used throughout this Experience Development Action Plan Paper are courtesy of Tourism NT

WARNING: Indigenous readers are advised that this document may contain images of or references to deceased persons.



BACKGROUND

Provides an overview of the Landscape, of the National Landscapes Program and of the principles behind the development of an Experience Development Action Plan for Australia's Red Centre

AUSTRALIA'S RED CENTRE

Australia's Red Centre National Landscape stretches from the far south-west Northern Territory, east, past Alice Springs, to the East MacDonnell Ranges. The Landscape inspires a common theme - a feeling of the enigmatic and surreal. The aim of the Experience Development Action Plan is to support the identification and development of experiences that deliver this feeling and can help to position Australia's Red Centre as a 'must see' and 'must return' destination against its global and national competitors who offer the appeal of being new and exotic.

Figure 1: Area encompassing Australia's Red Centre



AUSTRALIA'S NATIONAL LANDSCAPES

Australia's National Landscapes Program was developed by Tourism Australia and Parks Australia to highlight a collection of iconic places with great cultural, natural and spiritual significance. The Program aims to **promote the conservation of Australia's natural assets while raising awareness and visitation** to Australia's premier culture and nature-based destinations that deliver memorable holiday experiences to the international 'Experience Seeker' target market. This delivery is undertaken through targeted media and consumer activities and thorough planning for future product development needs.

Different organisations recognise different opportunities through the National Landscapes program.

- **Tourism Australia** use National Landscapes to prioritise funding for **media** and for promotion on their website.
- **National, Territory and Local Government** (e.g. Regional Development Commissions) recognise and take National Landscapes into account in development priorities for investment and infrastructure
- **Department of Lands, Planning and Environment** recognises it as an input to **licensing requirements and new tourism product / infrastructure needs**
- **Tourism NT and Tourism Central Australia** recognise National Landscapes as an input to their media and PR, as well as looking to incorporate the experiences and journeys into their marketing and development work.
- **Local Tourism Organisations** can use the material on their **websites, brochures and marketing**

In addition to Australia's Red Centre, there are currently 15 other National Landscapes that have been identified throughout Australia.

Figure 2: Australia's Red Centre National Landscape homepage on Australia.com



THE PURPOSE OF THE PAPER

Australia's Red Centre (ARC) National Landscape offers travellers a chance to be enriched by the distinctive stories, art and natural wonders that form the spiritual heart of Australia's Outback, as well as experience the vibrancy, colour and majesty that make this huge landscape a must-see for visitors from around the world.

In order to keep pace with the strong global demand for memorable experiences, this Experience Development Action Plan (EDAP) for the Red Centre has been developed through a co-funded agreement between Australia's Red Centre National Landscape Steering Committee, Tourism NT and the Department of Resources, Energy and Tourism - through its Strategic Tourism Investment Grant (STIG) Program (a funded initiative under the T-QUAL Grants Program).

This Experience Development Action Plan connects the major Hero Experiences identified within the landscape and identifies the Priority Projects which most appropriately support these experiences.

It is anticipated that this Experience Development Action Plan will renew the region's celebrated, international reputation and clearly differentiate it from its competitors.

Figure 3: Map of Australia's 16 National Landscapes

THE AIM OF AN EDAP IS TO:

- Build on TA's **positioning work** for ARC NL
- Shift from traditional tourism marketing and development to focus on **visitor experiences and emotional benefits**
- Identify '**Hero Experiences**' that are must-do world class experiences
- **Align experiences** with the wants and needs of key target markets
- Identify **current gaps** in the experience offering to provide guidance on future development priorities
- Define a set of **Priority Projects** suitable to be showcase in a **Market Sounding Report**



DEVELOPING AN EXPERIENCE DEVELOPMENT ACTION PLAN

Developing an **experience approach** requires a shift away from traditional tourism marketing and development to focus on visitor experiences and the emotional benefits that visitors take away from their trips.

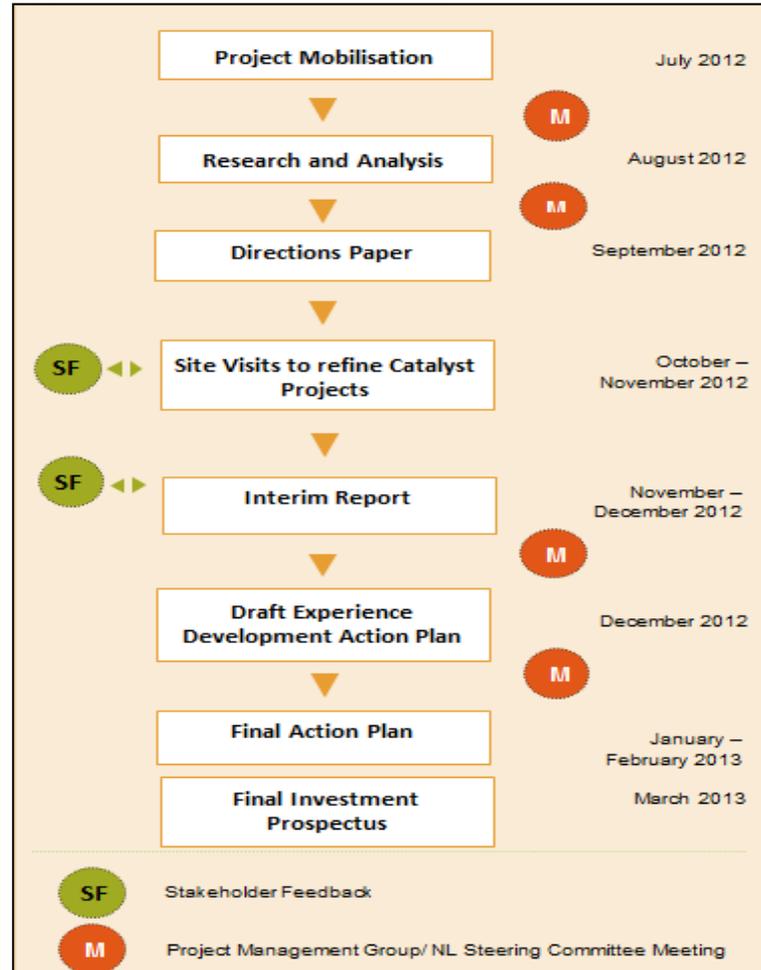
Identifying Australia's Red Centre '**Hero Experiences**' (the region's 'must-do world class experiences') and aligning these experiences with the wants and needs of the 'Experience Seeker' target market has been the first major step in developing this EDAP. This has been done through the Steering Committee and a survey of stakeholders.

The EDAP also brings together the recommendations and projects from existing strategies and aligns these with the 'Hero Experiences' identified, with the region's target markets and with the experience offerings of our competitors.

From this filtering process, a set of **Priority Projects** suitable to be showcased in a **Market Sounding Report** have been identified.

The key ARC experiences, competitive strengths, gaps and opportunities have been considered through the document and strategies have been developed which align the visitor expectations of Tourism Australia's 'Experience Seeker' psychographic visitor segmentation with the key experiences on offer in the region.

Figure 4: Timeline of development for the ARC EDAP



Consumers' needs are changing, therefore how visitors experience the region may also need to change. *see page 16 for further detail

GUIDING PRINCIPLES

The success of initiatives outlined in Australia's Red Centre EDAP are dependent on the ability of the National Landscape to adhere to a number of guiding principles (outlined in Figure 5 below) in order to deliver its promise.

Figure 5: Guiding Principles to ensure the success of ARC EDAP

Appeal to the Target Market

The projects and Hero Experiences need to understand and connect with the target market by incorporating the Experience Seeker's desires; greater access to nature; immersion in local culture; things that offer a contrast to everyday life; accessible yet remote Australian lifestyle; opportunities for personal development and learning; a sense of freedom; and delivering experiences they can 'brag' about.

Mutual Respect

Australia's Red Centre National Landscape recognises the spiritual relationship between Indigenous people and country and the stewardship role played to protect this unique and ancient Place and aims to strengthen the path to reconciliation through deeper understanding.

Lead by Example

Projects in the ARC NL should be leaders in environmental and social sustainability and set as showcase examples including integrity and long-term commitment for the region.

Align with Community Values

Be sensitive, low impact and complementary to the clearly articulated community values and aspirations – involving the many Indigenous cultures in developing unique experiences and ensuring the community has a strong voice in tourism – provide employment and business opportunities.

Be Sustainable

Projects and initiatives must be able to protect core values by promoting natural, cultural community; and economic sustainability including a clear return on investment for the public and private sectors.

Support the Destination

Build and showcase the existing brands with strong messages and in supporting new products and packaging that deliver the experiences that embody a sense of freedom, connection and discovery found nowhere else, across the whole destination.

Working in Partnership

Initiatives that are a priority for the NL are those that strengthen cross agency and cross sector partnerships. Ensure a region's focus on Indigenous and tourism operators partnerships. These partnerships will need to evolve over time and be based on a flexible approach and timeline for delivery based on the needs of a broad range of stakeholders.

Build our Competitive Strengths

Build on the uniquely incredible and inspiring strengths of Australia's Outback. Lifelong memories are made while journeying across the desert landscape to find hidden local waterholes, awe inspiring rock formations and desert lookouts, which together make Australia's Red Centre truly memorable.

BUILDING APPRECIATION

Our overall approach recognises that all tourism needs to be sustainable and that nature-based tourism in National Landscapes needs to deliver world-leading ecotourism outcomes (that is tourism that contributes to conservation not just minimising impacts) guided by the following principles: to actively restore, protect, enhance and sustain the quality of our National Landscapes for future generations to enjoy.

As outlined in Figure 5 opposite, the development of sustainable, nature based tourism should adhere to the five following principles:

EXPERIENCE

Deliver life-changing moments in nature through world-class experiences and quality tourism product.

APPRECIATE

Presentation of nature in a way that will grow the appreciation and emotional connections of visitors to nature.

ADVOCATE

Building advocacy for the landscape and wildlife, enlisting ambassadors and creating strategic alliances.

CONSERVE

Contributing to protection and conservation through best practice ecotourism.

INCLUSIVE

Our decision making processes are inclusive of the tourism industry, traditional owners, local communities, government agencies and visitors. Our facilities and services also enable access and quality experiences of all members of society.

Figure 6: Five Principles for the Development of Sustainable Nature-based Tourism



THE TARGET MARKET

Tourism Australia (TA) identifies the International **Experience Seeker** segment as the primary target market for the National Landscapes. The 'Experience Seeker' is a psychographic segment of visitors who are globe trotters looking for authentic interactions and brag-able locations. They are also visitors looking to get off the beaten track and to immerse themselves in local culture.

The 'Experience Seeker' target market seeks learning experiences and authentic interactions with locals, nature and destinations. They want fun, relaxing and care-free experiences and to escape the crowds. Food and wine and Indigenous experiences are also more likely to be demanded by this international visitor segment.

'Experience Seekers' are Australia's highest yielding international market and are more likely to increase to their length of stay and average spend in comparison to others.

"We don't want to feel like tourists, we want to settle in"

Brigitte, Germany

Key wants of the 'Experience Seeker'

Research has shown that the 'Experience Seeker' has a number of key 'wants' to satisfy their travel experience, these include:

- Authentic personal experiences
- Social interactions, including meeting and interacting with the locals
- Experiencing something different from their normal day-to-day life
- Understanding and learning about different lifestyles and cultures
- Participating in the lifestyle and experiencing it, rather than observing it
- Challenging themselves – physically, emotionally and/or mentally
- Visiting authentic destinations that are not necessarily part of the tourist route
- Exposure to unique and compelling experiences

To promote the vast array of unique Australian adventures to the 'Experience Seeker' target market, **seven key Australian Experience Themes** have been identified:

1. Nature in Australia
2. Aboriginal Australia
3. Journeys
4. Outback Australia
5. Australian Coastal Lifestyle
6. Australian Major Cities
7. Food and Wine



MARKET PROFILE

Provides an overview of key visitor trends to Australia's Red Centre

KEY MARKET TRENDS

According to the most recent figures*, Australia's Red Centre welcomes a total of 487,000 overnight visitors, accounting for 2.8 million visitor nights.

While total overnight visitation to Alice Springs has decreased by 13% over the last five years, overnight visitation to Lasseter has decreased by a larger 30% over the last five years.

Domestic Visitor Profile

Australia's Red Centre welcomed 297,000 domestic overnight visitors this year, representing a 6% decrease in domestic overnight visitation to the region since 2008. Domestic overnight visitors stay over 1.4 million nights within the region, a 19% decrease since 2008.

Over 70% (206,000) of all domestic overnight visitors to Australia's Red Centre are from the interstate market, with the major markets being Sydney (39,000 visitors), Melbourne (25,000 visitors) and Adelaide (16,000 visitors). Interstate visitation to Australia's Red Centre has declined by -15% since 2008.

Interstate visitors spend around 1.2 million nights, a 20% decrease since 2008. Sydney visitors spend the most number of nights in Australia's Red Centre in the (with approximately 286,000 nights). The Melbourne market accounts for the second largest number of nights (approximately, 103,000 per year)

The region also experiences a lower than average length of stay for domestic visitors (4.7 nights), compared to 6.3 nights on average for the Northern Territory.

Domestic visitation was dominated by the Holiday market (42% of all domestic overnight visitors) and the Visiting Friends and Relatives market (27% of all domestic overnight visitors).

International Visitor Profile

Despite 6% growth in international visitation to Australia since 2008, international visitation to Red Centre has declined by 27% (to 190,000 visitors).

This trend is more aligned with the whole of Northern Territory trend of a 18% decline in international visitation since 2008.

Europeans account for 61% of all international visitors to the Red Centre with the United Kingdom (26,000) and Germany (25,000) being the region's largest two international source markets. However, despite these markets remaining the region's largest, United Kingdom visitation has declined by 49% over the last five years, while German visitation has declined by a lesser 18% over the last five years.

The United States has become one of the region's largest source markets, accounting for 25,000 visitors to Australia's Red Centre.

The Red Centre hosts 1.4 million international visitor nights annually, this an increase of 9% since 2008. Aligned with his increase in international visitor nights in the region was an increase in the average length of stay of international visitors, up 2.3 nights since 2008, to 7.2 nights.

**Australia's Red Centre encompasses the statistical regions of Alice Springs, Lasseter and MacDonnell in the National and International Visitor Survey. Statistics are for the year ending March 2012*

KEY MARKET TRENDS

The key market trends that will impact on Australia's Red Centre and the future market mix and expectations include:

- A trend towards **shorter holidays** with the majority of visitors to the Red Centre now booking their accommodation prior to travel but leaving their tour bookings to after they have arrived making **day trips** an increasing trend.
- Growing visitor into Australia from **Asia (especially China)** who have limited awareness and connection to the NT and the natural attributes of Australia's Red Centre. Asia will be an increasingly important growth market for the NT while our traditional markets (UK, US, and Germany) will remain vital to the volume and the dispersal of visitors throughout the Landscape.
- Growing volume and value of the **soft adventure** market globally, and significant competition in this market from South America, Asia, and Africa.
- **Niche markets** represent the key growth sector for the Red centre including growth in the short-stay conference and cruise markets through to the long-stay fishing and 4WD camping market.



'Real and sustained growth will come from creating a culture of entrepreneurship. We need to unlock the full potential of our position as bridge to Asia'

Territory 2030

WHAT OUR COMPETITORS ARE OFFERING

Here are just some examples of what our market are being sold internationally:

- ✓ **Hike** up the towering red sand dunes of Sossusvlei, Namibia which offer picture-perfect views of the vast desert landscape and dried lake bed below.
- ✓ **Wild Bush Luxury** in the Flinders Ranges including boutique accommodation in the National Park.
- ✓ **Skywalk** 1,450m above the Grand Canyon to get a bird's eye view of one of the world's seven natural wonders.
- ✓ **Mountain bike** tours for any experience level through beautiful canyons and mesa tops of the Moab Valley (USA) – home to the world famous Slickrock Bike Trail.
- ✓ **Hot air ballooning** over breathtaking views for visitors of all ages (Coachella Valley (USA), Namibia).
- ✓ **Safaris** with Indigenous guides in the Sahara Desert by camel to see how these traditional natives interpret their land.
- ✓ **Group desert 4WD** tours through the sand dunes for up to 400 people at a time (Dubai).
- ✓ **Camping** amongst pristine wilderness on the border of one of Africa's largest game reserves (Kalahari Desert).

EMERGING MARKET TRENDS

Adventure / Adrenalin

- Identified as one of the fastest growing tourism segments worldwide
- Occurs in a natural environment or exotic outdoor setting
- The NT's diverse landscapes and natural areas are well positioned for growth in adventure tourism

Instantaneous Technology

- Social Media a key to our advertising future, advice from friends via Facebook and TripAdvisor for example is increasing in importance
- Mobile Phones: booking online, a large percentage of travellers use smart phones for travel and destination information. Up to 37% of international travellers accessed social media via their mobile phone.

LOHAS / Green Travel (Lifestyles of Health and Sustainability)

- Increasing consumer movement – new premium customer group
- Live and consume in an informed, aware and ethical manner in relation to health, fitness, social and environmental issues.
- Critical and aware of “greenwashing”
- Sustainability becoming a considered factor in travel plans

Glamping

- Luxury, soft adventure
- Emerging trend, popular across all demographics
- A range of product is emerging from top-end to mid range

Voluntourism

- Holidays where you feel like you are making a difference
- Increasing in popularity particularly with recent university graduates who seek real-world experience
- Range in duration from very short (e.g. coral watch) up to a year (gap year experiences)
- Fees generally cover food, entrance fees, campsite/cabin, tools for volunteer activity

Skywalks, aerial highways, zip lines,

- Adventure with different levels of adrenaline (bridge vs. zip line) in the natural environment
- A ‘bird’s eye view’ experience offering spectacular scenery
- Can allow for exploration with a limited individual footprint

Growing interest in cultural & heritage travel

- Cultural and heritage activities are expected to have the largest growth rate of all visitor activities, with an expected growth rate significantly higher than that anticipated for total visitation.

Education Tourism

- In both the domestic and international markets there is a growing segment of education travel with a particular interest in Indigenous experiences and spending time on country with Aboriginal people. It is this market that has the potential to support new Indigenous enterprises such as Homeland Stays.



DESTINATION POSITIONING

Provides an overview of Australia's Red Centre including the destination positioning and the identification of the key Hero Experiences for the region.

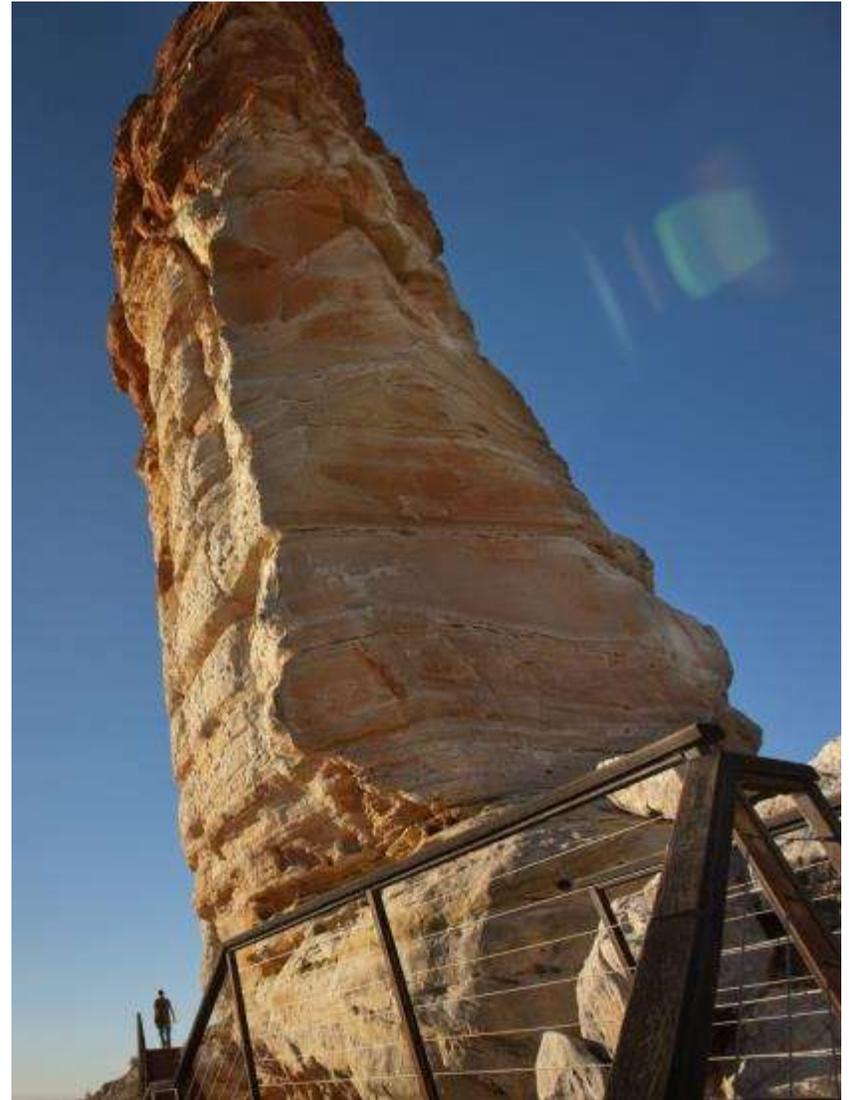
AUSTRALIA'S RED CENTRE POSITIONING

The positioning work of Leap Agency (a brand development company) for Australia's Red Centre provides a strong platform to articulate its Hero Experiences and is key determinant of the Priority Projects. The brand essence of 'enigmatic' suggests that the heroes and Priority Projects need to encourage a stronger emphasis on mysterious and alluring stories of the landscape, and the people.

'Enigmatic' means providing your visitors with the opportunity to be part of the mysterious and wondrous Landscape and its stories. The aim of the Experience Development Action Plan is to support the identification and development of experiences that deliver this feeling and can help to position Australia's Red Centre as a 'must see' and 'must return' destination against its global and national competitors who offer the appeal of being new and exotic.

The key positioning statement provided for Australia's Red Centre is:

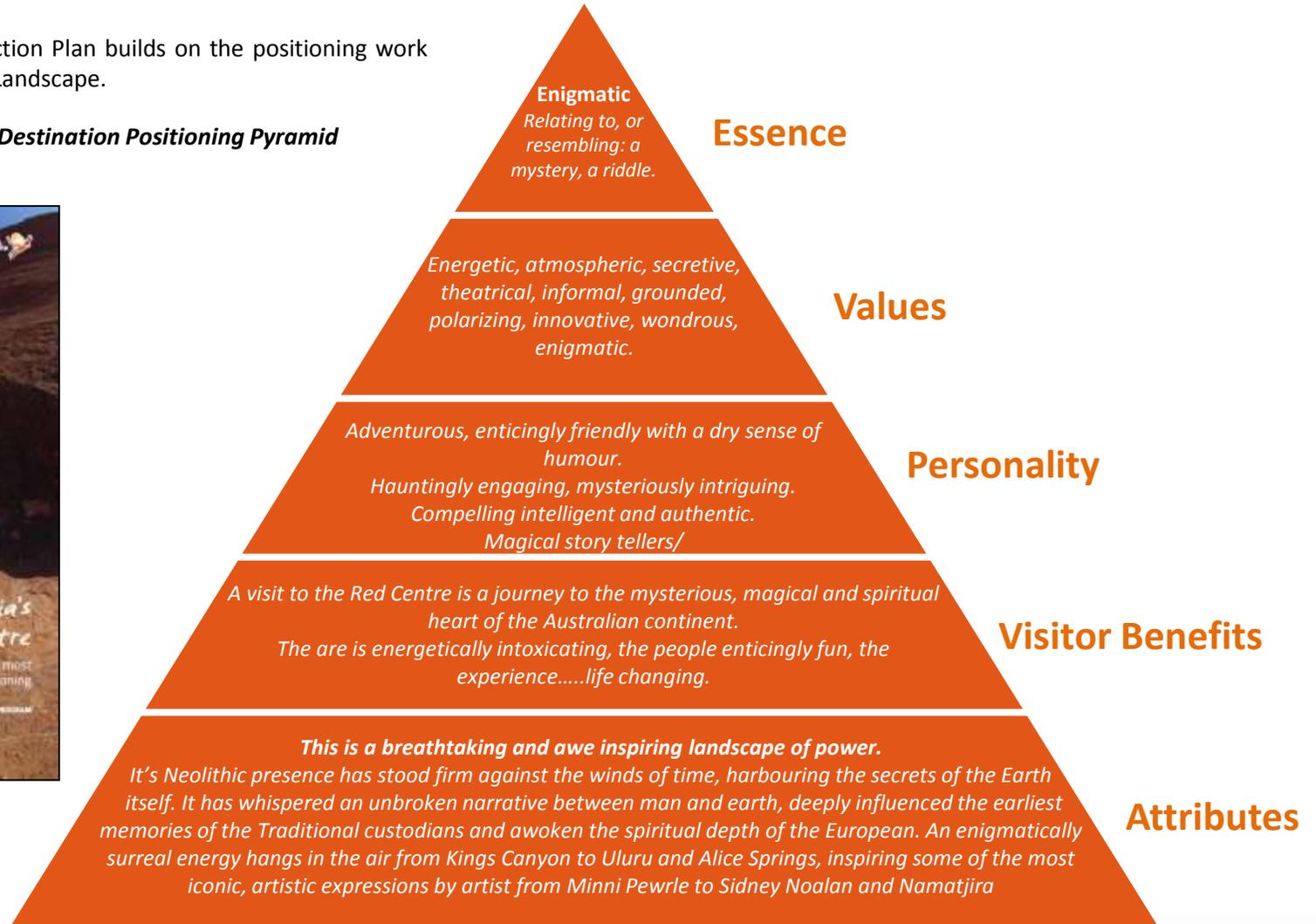
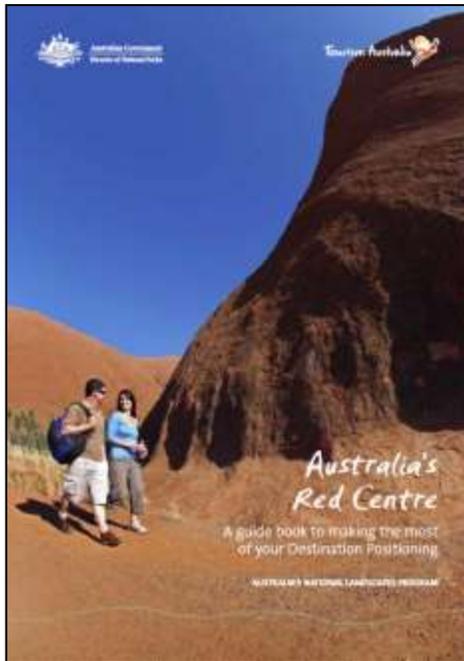
A breathtaking and awe inspiring landscape of power. It's Neolithic presence has stood firm against the winds of time, harbouring the secrets of the earth itself. It has whispered an unbroken narrative between man and earth, deeply influenced the earliest memories of the traditional custodians and awoken the spiritual depth of the European. An enigmatically surreal energy hangs in the air from Kings Canyon to Uluru and Alice Springs, inspiring some of the most iconic, artistic expressions by artist from Minnie Pwerle to Sidney Nolan and Namatjira.



AUSTRALIA'S RED CENTRE DESTINATION POSITIONING

The Experience Development Action Plan builds on the positioning work of Leap Agency for the National Landscape.

Figure 7: Australia's Red Centre Destination Positioning Pyramid



KEY THEMES

For Australia's Red Centre National Landscape our unique selling point (USP) is to offer 'a journey into the enigmatic, spiritual heart of the Australian continent. The air is energetically intoxicating, the people enticingly fun, the experience... life changing.'. This is delivered through a number of key themes which build on Tourism Australia's current destination positioning work:

The key themes suggested for Australia's Red Centre National Landscape include:

- **Eternal landscape:** The awe-inspiring rock formations Uluru and Kata Tjuta (the Olgas) rise dramatically from the sandy desert plain. Formed 500 million years ago, these huge rocks were part of a sea floor that evaporated eons ago leaving these awe inspiring monoliths sitting in stark relief on the surrounding plain
- **Oldest Living Culture:** The traditional owners of this region, are intrinsically linked to the landscape, its stories, animals and plants by their cultural traditions. Archaeological evidence suggests they have lived in the region for at least 22,000 years and that amongst many others Uluru and Kata Tjuta **continue to be** places of enormous cultural and religious significance.
- **Larapinta Trail:** A world-renowned remote walking track that extends for 220 kilometres along the Western MacDonnell Ranges over steep ridges and down into deep chasms, Larapinta is a byword for extreme adventure hiking for anyone looking for challenges with the ultimate reward.
- **Unique natural world:** Australia's Red Centre is a unique environment so it's no surprise its unique wildlife includes some of the world's rarest creatures that have evolved to suit this Landscape. Animals such as the southern marsupial mole, the legless lizard and the great skink are just some of the 'last chance to see' creatures living in this region.
- **World Travellers:** Local waterholes provide vital resting places for migratory birds heading south to their breeding grounds. At various times of the year there are visits from the Himalayan fork-tailed swift and the Sandpiper, escaping the harsh conditions of the Siberian winter.
- **Voluntourism:** The biodiversity of Australia's Red Centre is a precious part of Landscape. Conservation Volunteers Australia run a number of projects to help protect this wonderful wilderness, including a 14-day adventure to remove the invasive buffel grass from the Uluru-Kata Tjuta area.
- **Watarrka National Park:** This important conservation area is refuge for more than 600 species of native plants and animals. Around the rim of Kings Canyon there's a walking track offering visitors spectacular views of the canyon, as well as access to the lush permanent water hole, the Garden of Eden and views of the breathtaking Lost City.
- **Birds-eye view:** Sometimes the best way to see something is to stand back a bit; see the bigger picture. Nowhere lends itself more to the view from the air than the vast Landscape of Australia's Red Centre

¹ ARC NL Destination Positioning Guidebook, Tourism Australia (2012)

THE HERO EXPERIENCES

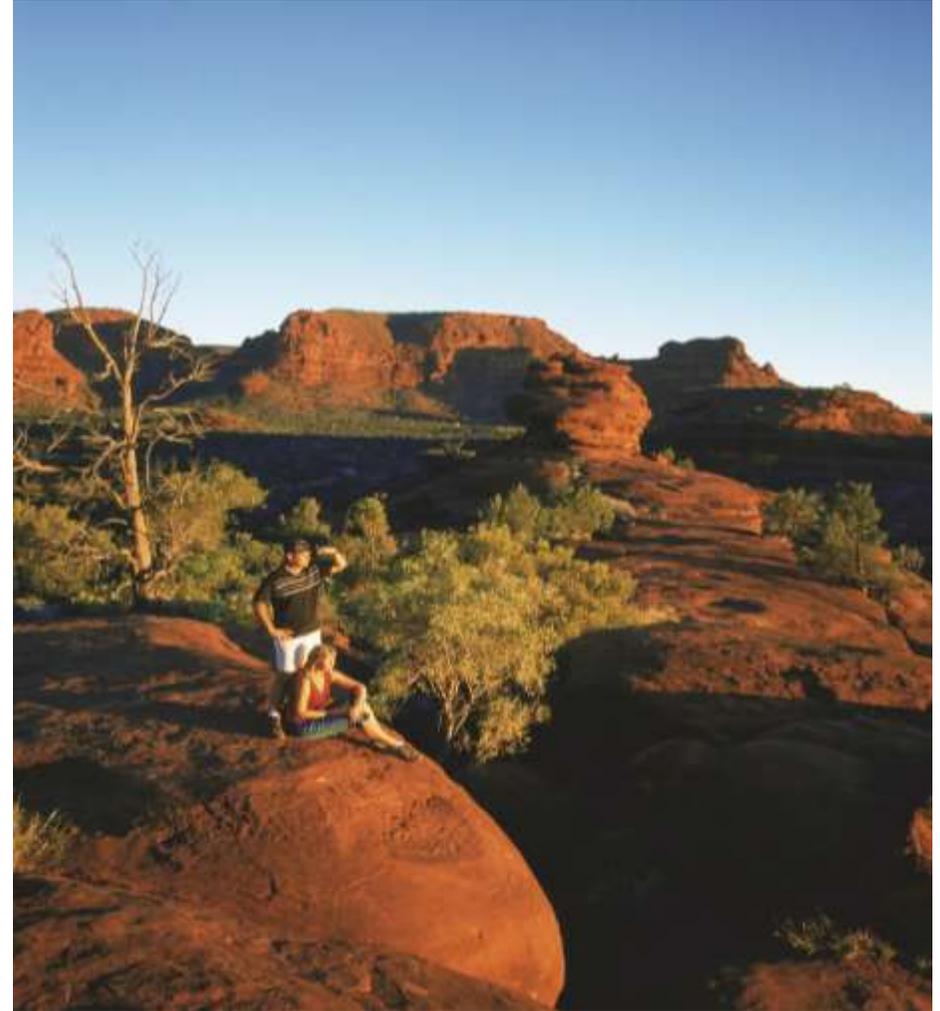
By matching the needs of the 'Experience Seeker' and the tourism offerings of our competitors against these key themes the project team suggest the following as 'Hero Experiences' of Australia's Red Centre.

The 'Hero Experiences' for consideration by the Australia's Red Centre NL Steering Committee are:

- Get the best vantage point to watch the **ancient cinema of light and rock** bringing a vast landscape to life
- Get to know the locals and see how they have **adapted to the landscape**

These 'Hero Experiences' are enhanced by a number of supporting experiences including:

- Leave the worries of the world behind on a **journey to remember** through an awe-inspiring landscape
- Place your trust in **ancient knowledge** as you trek across the landscape
- Adventure through **ancient caves and escarpments** to get a unique view of the landscape where you can have a safe adventure that gives you something to talk about that not everyone does.





THE WAY FORWARD

Provides a direction for Australia's Red Centre under the National Landscapes Program following the identification of the major Hero Experiences for the region. The 'Way Forward' involves the development of an Action Plan, detailing the key priority actions and projects required to develop these experiences in the region.

The Key Priority Projects and Actions have been identified following an assessment of related plans, projects and policy documents, accompanied by on-site assessment and through discussions with the ARC NL Steering Committee

ENABLERS AND ENHANCERS

Building on the comprehensive stakeholder engagement, both in the development of the Australia's Red Centre Positioning Guidebook and in preparing this EDAP, the Steering Committee have agreed on a clear direction for Australia's Red Centre. That direction is based on seeing the identified hero experiences (see p. 23) come to life for visitors.

For this to occur, two things must happen - the Priority Projects identified through the consultation and agreed through the Steering Committee and agency consultation need to be implemented and to achieve this the following enablers need to be progressed. As the Priority Projects, including a number of catalyst projects and the identified emerging opportunities, are implemented the Experience Seeker will see the essence of the destination positioning and the vision come to life.

A Clear Role for Industry

Australia's Red Centre National Landscape has the potential to be used as a lobbying tool, a value to industry that needs to be clearly understood by the TCA Board, shared with their GM and included in their roles and responsibilities. The key aim being to have around 50% representation on the Steering Committee from industry (currently the only industry person on the Committee is from TCA) and this may need to come through a reshaping of the priorities of the Committee to ensure Australia's National Landscape remains relevant to industry.

Connectivity

Telecommunications is part of everyday modern life and the ability to access WiFi, mobile connection and high-speed broadband is taken for granted. While many places of natural beauty are enhanced by the absence of technology connectivity many more could be enhanced and

investment enabled both by community and investors with a greater investment in telecommunications infrastructure.

Road Infrastructure

The sealing of the Red Centre Way Inner Loop is the undoubted number one priority expressed by all stakeholders. This in and of itself could have a dramatic impact on regional dispersal but more importantly this project would be the catalyst for a number of projects that meet and deliver on the aspirations of Australia's National Landscapes concept. It is understood that the NT Government has committed to the \$30M cost of the remaining 50km of unsealed roads (two sections). Sealing the Red Centre Way Inner Loop has the potential to transform the nearby communities offering a new opportunity for natural and cultural tourism in areas such as Hermannsburg and Ipolera to build appreciation and interest in the West MacDonnell Ranges. This should serve as catalyst and help to direct focus toward Hermannsburg and the Finke Gorge National Park. Opportunities will also grow in Indigenous tourism with Hermannsburg and along Larapinta Drive on the forefront through its strong ability to display cultural and Aboriginal experiences. This could be enhanced with any development of a Signature Lodge in the area.

This report highlights a number of projects that could and would become significantly more viable with the sealing of the loop.

National Approach to Guide Accreditation and Training

The current Knowledge for Tour Guides Accreditation Program, run in UKTNP, provides a foundation for a more comprehensive training program potentially linked to an Australia's National Landscapes training and education package.

ENABLERS AND ENHANCERS

Each of Australia's National Landscapes has identified Tour Guide training and professional interpretation as a key priority and this needs to be pushed as a priority. The aim is to mix the formal Guide Training with Guide Mentoring and peer to peer learning programs like those developed through Savannah Guides and the currently inactive Desert Guides program in the Red Centre.

The Experience Development Action Plan will attempt to flesh this opportunity out in more detail however it appears to have the strong support of national bodies such as ATEC.

Timely Decisions

The NT Government, Commonwealth Government and the Central Land Council need to support new joint ventures by providing timely decisions with clear justifications. It may be necessary to provide greater support to start-up businesses in the next 2-3 years as confidence builds in the region.

Tourism Workforce

The new Red Centre Tourism Employment Plan will provide the strong foundation required for The Red Centre to take advantage of the new and changing nature of the tourism market. Support is required to ensure the continuation of initiatives identified within the plan.

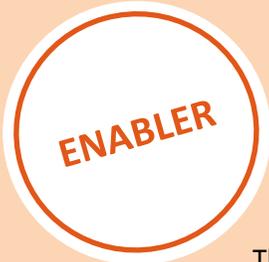
The Experience Development Action Plan acknowledges the contribution made by numerous Northern Territory Government Agencies in reaching its recommendations and considers a key enabler the continued Whole-of-Government approach to investment attraction and tourism development that is in place.

ENABLERS AND ENHANCERS

KEY ACTIONS

The following have been identified as key actions to support the enablers identified for Australia's Red Centre

ACTION	TIMEFRAME	LEAD AGENCY
E1. Support tourism and hospitality workforce development through support for the initiatives outlined in the Red Centre Tourism Employment Plan .	Ongoing	ARCNL Steering Committee
E2. Seek funding support to facilitate increased investment in communications infrastructure within the region, particularly with access WiFi, mobile connection and high-speed broadband.	Short Term	Local Governments
E3. Implement the updated processes involved in securing access to land for tourism activities and/or development. This includes Parks (Federal & NT), Aboriginal Land and Pastoral leases.	Short Term	CLC DRDWP
E4. Through the National Landscapes Program prepare a proposal for consideration of utilising the current Knowledge for Tour Guides Accreditation Program , run in UKTNP, as a foundation for a more comprehensive national training program.	Medium Term	ARCNL Steering Committee
E5. Support new joint venture tourism investments by providing timely decisions with clear justifications through a new standardised process of decision making.	Medium Term	CLC NT Govt
E6. Promote the sealing of the Mereenie Loop that links the West MacDonnell National Park to the Finke Gorge National Park, as a public investment opportunity	Medium Term	TCA Industry
E7. Build a strong business case to ensure the continuation of the recently increased air capacity to the Red Centre.	Long Term	Industry



ENABLER

SEALING THE RED CENTRE WAY (INNER MEREENIE LOOP)

What's the need?

The self-drive market is important to tourism in Australia, and has characteristics which influence how tourism product is managed and distributed. The drive market also brings tourists and associated economic outcomes to locations away from the major transport routes. If roads are unsealed however, a region may not be able to reap these benefits. Unsealed roads such as the Red Centre Way are a significant deterrent to those in hired vehicles, heavy vehicles, caravans and less experienced, less skilled drivers.

What is proposed?

Creation of a full sealed loop that links the West MacDonnell National Park to the Finke Gorge National Park, including Hermannsburg, Tnorala, Tyler's Pass and associated attractions has been proposed as a public investment opportunity to facilitate private investment. Namatjira Drive and Larapinta Drive to the Ipolera intersection will be incorporated in the sealing.

Sealing the remaining 50km of the 'inner loop' will enable visitors to extend their length of stay to the region. This in turn will provide opportunities for new touring options and increase the demand for existing and potentially new accommodation providers.

There is already a tender in place to seal the 7km section of the Red Centre Way by the Department of Infrastructure for \$5 million as well as a tender for \$25 million to seal the 43km section, however this project is not currently underway.

According to the Sealing the Red Centre Way Inner Loop: Impact on Southern Region Parks Development Plan (2001) the following developments were proposed;

- Expand car parking capacity
- Add toilet facilities
- Upgrade and develop walking trails
- Seal roads to Lilla, Kathleen Springs, Ellery Creek, and Tyler's Pass
- Upgrade Signage and other interpretation infrastructure
- Upgrade shelters and seating
- Improve water supplies
- Construct duplex accommodation

Market Trends – Drive

The Red Centre welcomes approximately 130,000 domestic drive visitors each year. The drive market currently accounts for 42% of all domestic drive visitors to the Red Centre each year. The domestic drive market to the Red Centre has declined by approximately 16% over the last five years. Comparably, total domestic overnight visitation to the Red Centre has declined by a lesser 6% over the last five years.

Domestic drive visitors to the Red Centre stay an average of 4.4 nights in the region, accounting for closer to 570,000 visitor nights in the region each year. In comparison, overall domestic visitors to the Red Centre stay an average of 5.1 nights each in the region. The average of length of stay of domestic drive visitors in the Red Centre has declined by close to 1 night since 2008.



SUPPORTING REGULAR PASSENGER TRANSPORT (RPT) AIR SERVICES

What's the need?

Retaining air access into the region remains of critical importance to the future of Australia's Red Centre National Landscape. While route economics dictates aircraft deployment, there is a role for supportive marketing, incentivizing, and ongoing discussions with airlines to encourage increasing or at least maintaining access into the Red Centre.

Air access into the region is a key concern in light of the trend towards shorter breaks. Intra-regional air services are appropriate at current levels and there is a need to maintain the current mix of seat capacity.

What is proposed?

Recent increases in air capacity to the Red Centre will provide important stimulus to drive demand for the priority projects referenced under each of the Hero Experiences on the following pages.

Tiger Australia Airways have announced a new four weekly return service between Melbourne and Alice Springs and between Sydney and Alice Springs, commencing April 2013. This follows an 18 month absence in the region.

These new routes have the potential to deliver over 5,000 additional visitor seats weekly through Alice Springs Airport.

To ensure the continuation of this degree of capacity to the Red Centre, continued marketing support is required from the industry, especially into the conference, events and leisure markets. This will require greater local support from industry.

Jetstar

Jetstar Airways announcement of four-times weekly flights from Sydney to Yulara will also provide valuable throughput across the region. The new routes will provide 1400 seats a week.

Collectively the Tiger Airways and Jetstar Airways services will provide an additional 6500 seats to Australia's Red Centre each week.



HERO EXPERIENCES AND PRIORITY ACTIONS

The Red Centre is a Landscape of Breathtaking Power and Spiritual Depth

To ensure that visitors are able to experience the essence of the Red Centre, captured in statements like that above, the following Priority and Emerging Projects have been identified.

Hero Experience #1: Get the best vantage point to watch the ancient cinema of light and rock bringing a vast landscape to life each day.

- Create a commercially appropriate foundation for ballooning near the rock (*Priority Project #1*)
- Build new tented accommodation in close proximity to the Ormiston Gorge (*Priority Project #2*)
- Build new exclusive accommodation in close proximity to the West MacDonnell National Park (*Supporting Project*)
- Develop greater tourism infrastructure in the West MacDonnell National Park (*Supporting Project*)

Hero Experience #2: Get to know the locals and see how they have adapted to the landscape

- Events support and development program (*Priority Project #3*)
- Endangered Species Revival and Awareness Centre in or near UKTNP (*Priority Project #4*)
- Grow new wildlife voluntourism opportunities (including night activities) linked to business events (*Supporting Project*)

- develop an iconic Australian Indigenous tourism experience (*Supporting Project*)
- Upgrade the Uluru – Kata Tjuta National Park Cultural Centre (*Supporting Project*)

Supporting Hero Experiences:

Adventure through ancient caves and escarpments to get a unique view of the landscape where you can have a safe adventure that gives you something to talk about that not everyone does.

Leave the worries of the world behind on a journey to remember through an awe-inspiring landscape

Place your trust in ancient knowledge as you trek across the landscape

- Develop a world famous Mountain Bike track and event near Alice Springs or the West Macs (*Priority Project #4*)
- Ilpurla Multi-day Accommodated Walk (*Priority Project #5*)
- A multi-day accommodated walk in or near UKTNP (*Supporting Project*)
- Develop product for Homeland Visits and Associated Tourism Hub (*Supporting Project*)

These projects are detailed in the Priority Actions section overleaf.

In considering the viability of opportunity, consideration must be given to the existing commercial operators in the area and their planned investments.



PRIORITY ACTIONS

Outlines the priority actions required for the appropriate development of the Hero Experiences and the Supporting Experiences identified for the Red Centre. The Priority and Supporting Actions are sectioned based on the 'Hero Experience' that they work to support.



HERO EXPERIENCE #1 *Get the best vantage point to watch the **ancient cinema of light and rock** bringing a vast landscape to life*

HERO EXPERIENCE #1 *Get the best vantage point to watch the **ancient cinema of light and rock** bringing a vast landscape to life*

The ancient cinema of light and rock is on display throughout all parts of the region and throughout all times of the night and day.

No matter whether visitors are seeing this being played out at World Heritage-listed Uluru (with colours so vivid they upstage the sunset) or at the Standley Chasm (where steep walls blaze in the midday sun). Whether visitors are wandering through the desert oasis of Palm Valley making their way around the rock domes of the lost city.

This interweaving of rock and light on the landscape plays out at anytime of the day or night. From a tour at sunrise to gazing at the galleries of stars on a clear and peaceful desert night.

Vantage points are from the air, from your accommodation, while cooling off at the pools of the Garden of Eden. from your dinner table at the Sounds of Silence or by scrambling over ancient, neo-lithic escarpments scattered across the vast landscape. Regardless of the where you are across the landscape, this ancient cinema is on show for all to see, no set session times, no reserve seats and no additional admission fees required.

SUPPORTING EXPERIENCES

Listed below are experiences available within the landscape which can be used to support this Hero Experience:

- Seeing the landscape from the air, watching the shadows fall over the towering monoliths, creating almost an artist's view of the colourful landscape.

- Find a refreshing **waterhole oasis** in a secret gorge and enjoy the simple pleasures of relaxing in nature and amongst the ancient escarpments
- See **more stars than you ever thought existed** in the peaceful desert night

PRODUCT DELIVERY

A number of tourism products already exist within the Red Centre National Landscape which support visitors opportunities for visitors to *watch the ancient cinema of light and rock*. These include:

- Desert Awakenings 4wd tour
- Devils Marbles and Tennant Creek
- Kings Canyon
- Uluru-Kata Tjuta National Park
- West and East MacDonnell Ranges
- Sounds of Silence
- Ayers Rock Resort: Outback Sky Journeys
- Ayers Rock Scenic Flights
- Earth Sanctuary World Nature Centre

PRODUCT GAPS

- Ballooning options at UKTNP
- Build new accommodation in close proximity to the West MacDonnell National Park and tourism infrastructure

HERO EXPERIENCE #1 *Get the best vantage point to watch the **ancient cinema of light and rock** bringing a vast landscape to life*

PRIORITY PROJECTS

The following two Priority Projects have been identified to support the Hero Experience 'Get the best vantage point to watch the **ancient cinema of light and rock** bringing a vast landscape to life':

Priority Project #1: Create a commercially appropriate foundation for ballooning near the rock;

There is currently a limited number of possibilities in the way that visitors can view the enormity of the landscape. This has been further exacerbated by the contemplated closure of rock climbing activities across a number of the Landscape's sacred sites, including Uluru. Creating opportunities to 'view from the air' will create a new way to appreciate the landscape, while enabling visitors to enjoy the thrill of the elevation.

Priority Project #2: Build new tented accommodation in close proximity to the Ormiston Gorge;

A key aim of Australia's National Landscape Program is to embrace the diversity of the entire landscape. The Ormiston Gorge in the West Macs is a feature of the landscape that offers this diversity. This opportunity to build new tented accommodation would provide visitors with more accessible opportunities to experience swimmable waterholes, spectacular escarpments and rock art.

To further enhance these Priority Actions, three future steps need to be undertaken:

- Identify gaps in National Park infrastructure to identify potential locations for the development of accommodation.
- Create new event spaces and maximise the rocky landscape for signature events that maximise the sunset in the East Mac and the new event policy of the UKTNP.

These Priority Actions are explained in greater detail on the following pages

HERO EXPERIENCE #1 *Get the best vantage point to watch the **ancient cinema of light and rock** bringing a vast landscape to life*

EMERGING PROJECTS

In addition to these Priority Projects, a number of Emerging Projects have been identified:

Supporting Project: Build new exclusive accommodation in close proximity to the West MacDonnell National Park

The high end accommodation and incentive markets, provide lucrative tourism opportunities, with these market segments being largely untapped within the landscape. This priority action would seek to secure greater visitation from particular source markets, including Chinese inbound visitation, fly in fly out visitors through the development of high end (but remote) luxury accommodation product.

An up-market lodge style development is proposed by, or in joint venture with, the Traditional Owners (TOs) and will include up to 20 cabins.

Interpretive elements will be used throughout the development for visitors to gain insight into the cultural significance of the site and its previous (and current adjacent) uses (e.g. mining, gas), and will include an exclusive walking track with guided tour.

Key sites of significance to avoid and interpret will be also be identified prior to development by working with the TOs and a partnership model will be used with local communities for essential infrastructure (e.g. Construction of an Outstation, support for telecommunications infrastructure).

Supporting Project: Develop greater tourism infrastructure in the West MacDonnell National Park

National Parks are a major attraction to visitors to various destinations and the infrastructure available in national parks plays an integral role in the attractiveness of a National Park. Well situated infrastructure that is operating effectively contributes to visitor and tourism outcomes in national parks.

Infrastructure fulfils diverse roles with some being known as destinations in their own right (e.g. MaMu Rainforest Canopy Walk) or are a key part of national parks destinations.

With the volume of visitors to the West MacDonnell Ranges steadily increasing, it is time to address the current and future infrastructure needs to meet this demand.

The following proposed infrastructure projects for the West MacDonnell National Park are consistent with those outlined in the Sealing the Red Centre Way Inner Loop: Impact on Southern Region Parks Development Plan (2001):

- Upgrade interpretation as entry point to the West MacDonnells
- Infrastructure development proposals for the West MacDonnell National Park are concentrated on the Redbank / Glen Helen / Ormiston sector of the Park to facilitate the economic security of any future Resort development in the area.
- Upgrading of day use facilities at Ormiston Gorge
- Construct duplex at Simpsons Gap.
- Replace existing, ageing shade shelter, interpretive panels and seating at Glen Helen



BALLOONING NEAR THE ROCK

What's the need?

Uluru is one of the few sites in Australia that could claim to be an icon, and as such, claim to have their experience as being iconic. The contemplated closure of the rock for climbing, while an activity declining in popularity, remains a challenge to the future contribution of tourism to the Red Centre. The possibility of creating a new way to appreciate the landscape from above, while enjoying the thrill of the elevation needs to be pursued.

What is proposed?

The opportunity exists to support a balloon experience near the rock, without compromising the values of the place or experience of other users. The key to this Priority Project being an Australia's National Landscape catalyst project, is the involvement and interpretation of the Anangu people - the traditional owners of UKTNP.

Astrosphere has submitted a proposal to Voyages Indigenous Tourism Australia to operate a tethered balloon experience at Ayers Rock Resort - a truly unique tourist attraction at Uluru. The SkyFlyer is the latest and most advanced generation of manned tethered helium balloons and will offer visitors to Australia's iconic Red Centre an exciting, affordable, safe and reliable ballooning adventure.

The aim is to deliver an inspiring and memorable experience for visitors and to promote respect for local Indigenous culture and traditions by offering an attractive alternative to the climbing of Uluru.

Key highlights of the proposal are:

- A unique tourist attraction and experience at Uluru (hosted at Ayers Rock Resort);
- A venture which promotes cultural sensitivity and delivers benefits to local Indigenous people;
- An environmentally friendly and low impact development;
- Availability of the service in almost all weather conditions, and;
- A strong team of dedicated operational professionals.

Ballooning is not permitted on Park land so the proposal is to have the experience on resort land.

Market Trends - Soft Adventure

The Red Centre (Lasseter, MacDonald and Alice Springs) welcomes approximately 175,000 overnight nature/adventure visitors in the year ending June 2012. This represents a 23% decrease in nature/adventure visitors to the Red Centre over the last five years (with 229,000 overnight natural adventure visitors in 2008).

The Red Centre's Nature/adventure visitor market is comprised of on average 24,000 domestic overnight visitors each year and 152,000 international visitors. The Red Centre hosts approximately 10% of domestic overnight nature/adventure visitors to the Northern Territory. Nationally the domestic overnight nature/adventure market has decreased by 4% over the last five years (to approximately 2.1 million travellers per year). Domestic overnight nature/adventure travel to the Northern Territory has decreased by 6% over the last five years.



BALLOONING NEAR THE ROCK

As above, the Red Centre welcomed 152,000 international nature/adventure visitors in the year ending June 2012. This represents a decrease of 26% in international nature/adventure visitation to the area over the last five years. This trend is in line with the whole of the Northern Territory trend, with international nature/adventure visitation declining by 22% over the last five years (to 203,000 in 2012). The Red Centre currently accounts for 75% of all international nature/adventure visitors to the Northern Territory.

International nature/adventure visitation to Australia has increased by 2% over the last five years to 3.3 million in 2012.



CASE STUDY:

ANGKOR WAT TEMPLE TETHERED BALLOONING

A passenger carrying tethered balloon operates at the World Heritage listed site for tourist to ride and enjoy expansive views of the Angkor Wat temples.

The balloon is located about 1 km from the Angkor Wat entrance and operates year round from **Sunrise** to **Sunset** except in windy or rain conditions.

Flights are of approximately 10 minutes duration from the ground to a maximum altitude of 150 metres and operate up to 30 flights per day. The number of passenger allowed per flight are from 1 to 30 persons depending on the weather conditions.



**PRIORITY
PROJECT
#2**

ORMISTON GORGE TENTED ACCOMMODATION

What's the need?

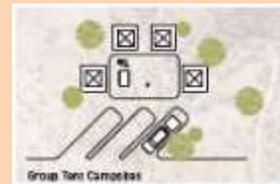
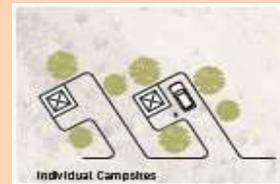
One of the more popular gorges in the West Macs is Ormiston Gorge. A key aim of Australia's National Landscape is to embrace the diversity of the entire landscape. Providing a more pleasant climate, swimmable waterholes, seeing spectacular escarpments and rock art. If done successfully, the result could be a broadening of the market for active international experience seekers.

The aim is to provide access for ordinary vehicles and tour buses (to a point). There is not a requirement to bitumen the entire length just to make it a more-weather (not all weather).

What is proposed?

According to the Ormiston Gorge Camping Ground Masterplan developed by Dunn & Hillam Architects several key sites infrastructure developments have been proposed. This development would be an addition to the already planned \$5 million upgrade of Ormiston Gorge which includes:

- A Coach Group Site on the old Quarry site with site for 22 tents, 2 ablution blocks, 1 kitchen and coach parking.
- Improve water supply through a 250,000 kL storage fed from bore at Ormiston Gorge.
- General camping area with 85 sites suitable for campervans, motorhomes or other car supported camp set ups. There would be one kitchen and ablution block allowed for every 50-60 people.
- 20 walk-in/ride-in sites for light impact campers who either walk or ride in along trails or carry their gear from the car.
- A site reserved for future expansion allowing for 20-30 campsites and supporting ablutions and kitchen blocks.



Market Trends – Caravan and Camping

The trend towards more upmarket cabin style accommodation is evident in the proliferation of this type of accommodation investment across Australia over the past 10 years. From overnight walks to beach front National Parks and Caravan Parks, upmarket cabins have become the new norm. Within one hour of Kakadu National Park are two relatively new investments in Wildman Wilderness Lodge and Bamurru Plains.

Based on a rough estimate of \$400 per night and a further \$125 per night spend on incidentals per person (10 rooms for 9 months at 65%) the facility would generate an economic benefit of \$1.2M per annum into the economy supporting an estimated 15 jobs.

It is expected that 50% could be invested privately with the remaining coming from Government or Community funds.

This project has significant potential as a catalyst, however the current market demand would mean this style of investment would not be viable until a number of current investments proceed (both public and private) and to demonstrate strong growth prior to attracting investors.



ORMISTON GORGE TENTED ACCOMMODATION

For the Ormiston Gorge Tented Accommodation project to be viable, the overnight rates would need to be similar to those outlined for similar accommodation below.

Table 1: Competitor Pricing Structures

Accommodation	Type	Rate
Glen Helen Resort	Motel Rooms	\$155 single/double/Twin
	Bunkhouse (4 beds)	\$30/ person
	Camping powered sites (2 people)	\$30
	Camping (unpowered)	\$12/ person
Standley Chasm Campground	Campsites	\$11/ person
Cape Conran	Cabins (4 people)	\$155.25, \$38.81/ person
	Lodge (10 people)	\$307.25, \$30.73/ person
	Safari Style Tent (2 People)	\$165
	Camp site (up to 4 people)	\$28.25
Adels Grove	Room (2 adults)	\$150.00
	Campsites	\$17 per adult, \$8.5 per child.



CASE STUDY: CAPE CONRAN COASTAL PARK

Cape Conran Coastal Park is located near Marlo in Eastern Victoria, just under 400km from Melbourne. The park consists of 11 700 hectares of coastal wilderness with approximately 60km of beaches facing the Bass Strait. The coastal park offers four types of ecologically sensitive accommodation including bush camp sites, cabins, a lodge equipped with a large kitchen, BBQs and log ovens and permanent luxury safari tents (Wilderness Retreats).

The park features a wealth of natural and cultural attributes of conservation importance and of significance to Indigenous peoples. There are also many activities which visitors can undertake whilst staying at the park. These include fishing, picnicking, surfing and swimming, boating or experiencing the park by foot on one of the self-guided trail or day walks.

On average, the park attracts an estimated 200 000 visitors each year with the Cape Conran cabins and campground accounting for approximately 35 000 visitor night annually. The park provides opportunities for visitors to enjoy and appreciate natural and cultural values and makes an important contribution to the economy of local coastal settlements.

Compared to others, the Cape Conran Coastal Park offers a variety of luxury accommodation options for the glamorous adventurers with prices ranging from \$28.25-\$307.25 (for a group of 10) per night .

HERO EXPERIENCE #1 *Get the best vantage point to watch the **ancient cinema of light and rock** bringing a vast landscape to life*

KEY ACTIONS

Based on an assessment of the Priority and Supporting Projects, the table below outlines the key actions required to develop this Hero Experience in Australia's Red Centre. Each action is assessed on its level of priority as an immediate term (1-2 years), medium term (3 – 5 years) or long term (6+ years) action.

ACTION AREA	ACTION	TIMEFRAME	LEAD AGENCY
Priority Project #1 Ballooning near the Rock	1.1 Support operators seeking to further develop these projects, including Voyages proposal for a tethered balloon operation and/or the reinvigoration of existing permit holders option to balloon near the rock	Immediate	ARCNL Steering Committee
Priority Project #2 Ormiston Gorge Tented Accommodation	2.1 Secure Government support for the implementation of the West MacDonnells Camping Accommodation Project	Short Term	Parks NT
	2.2 Design and develop an expressions of interest Paper that demonstrates a clear market demand profile for the project	Medium Term	Parks NT
	2.3 Select and secure investment partners	Long Term	Parks NT DOB
Emerging Projects	<i>Support the building of new exclusive accommodation in close proximity to the West MacDonnell Ranges National Park</i>	Medium Term	DOB Tourism NT
	<i>Secure necessary funding to develop additional tourism infrastructure in the West MacDonnell Ranges National Park</i>	Medium Term	NTPWS

HERO EXPERIENCE #2 Get to know the locals and see how they have **adapted to the landscape**



HERO EXPERIENCE #2 *Get to know the locals and see how they have adapted to the landscape*

Australia's Red centre National Landscape provides an abundance of opportunities for visitors to experience the landscape just like the locals do.

Visitors are rewarded through learning more about the region's rich pioneering history through the range of museums and heritage centres scattered across the landscape. See the historic Alice Springs Telegraph Station where the town began, have a lesson in the world's largest classroom in the School of Air or come at certain times of the year to see the population celebrate the Alice Springs Beanie Festival or the Finke Desert Race.

Visitors are also provided with opportunities to see first hand, what makes the landscape so unique for people to adapt to. The Alice Springs Reptile Centre, for example, provides opportunities to see, in the flesh, the truly unique flora and fauna from the region. While a visit the Royal Flying Doctor Service – the first aerial medical organisation of its type in the world – provides opportunities to fully fathom the size and vastness of the landscape.

SUPPORTING EXPERIENCES

Listed below are experiences available within the landscape which can be used to support this Hero Experience

- Give a little something back and **feel enriched** by the distinctive stories, art, and connection to the spiritual heart of Australia.
- Take the time to see our **elusive and endangered wildlife** in their natural environment and see how they survive and thrive and **how we have co-existed with them for generations**
- Learn more about the vast history of this ancient land through **encounters with it's traditional custodians**

PRODUCT DELIVERY

A number of tourism product already exist within the Red Centre National Landscape which support this Hero Experience, these include:

- Alice Springs Desert Park
- Alice Springs Reptile Centre
- Alice springs Telegraph Station
- Alice Springs School of the Air Visitors Centre
- Harts Range Bush Sports Weekend
- Bangtail Muster
- Tatts Finke Desert Race
- Arlpwe Art and Cultural Centre
- Royal Flying Doctor Service
- Flynn Trail

PRODUCT GAPS

- Events support and development program
- Wildlife voluntourism opportunities
- Socially responsible activities for the business events market
- Indigenous learning opportunities

HERO EXPERIENCE #2 *Get to know the locals and see how they have adapted to the landscape*

PRIORITY PROJECTS

The following two Priority Projects have been identified to support the Hero Experience: *'Get to know the locals and see how they have adapted to the landscape*

Priority Project #3: Events Support and Development Program

The events market is a high yielding visitor segment. Events provide opportunities to increase direct expenditure at a destination, promote destination awareness amongst key markets and stimulate the development of new facilities and infrastructure.

This project is considered an important part of the growth of the region.

Priority Project #4: Endangered Species Revival and Awareness Centre In or near Uluru- Kata Tjuta National Park

The concept of an endangered species sanctuary embraces both the tourism and conservation values identified through the National Landscapes Program. Australia's Red Centre is home to a lot of unique wildlife, much of which is difficult to see in its natural habitat.

There is also a need for the development of areas which offer greater protection for endangered species in the region and which offer Aboriginal Custodians opportunities to develop these sanctuaries on-country and offer interpretation.

This Priority Project is a key to the success of other emerging projects including the Voluntourism project opposite

*These Priority Actions are explained in greater detail
on the following pages*

EMERGING PROJECTS

In addition to these Priority Projects, a number of Emerging Projects have been identified:

Supporting Project: Wildlife Voluntourism Project

Internationally, voluntourism and learning holidays are an emerging niche holiday experience for those looking for a holiday with a difference. The Red Centre has some compelling opportunities for voluntourism as a way of growing a new market and further extending a holiday or business trip. By engaging directly with the community, tourism in the Red Centre can reach beyond the traditional to deliver broader social and environmental benefits. While many 'voluntourists' are recent university graduates they can spend an average of \$3,000 per trip.

It is proposed that this will be a voluntourism opportunity that will cater to the education market.

Business events is also an important secondary market to leverage voluntourism. Organisers and companies are growing more concerned if environmental and social issues are not taken into account when planning an event. This has resulted in some companies harnessing their events to give back to the community and/or the environment.

A voluntourism project could be done in partnership with Conservation Volunteers Australia and existing products such as the Alice Springs Desert Park and could be packaged through a range of options to attract education and business groups.

HERO EXPERIENCE #2 *Get to know the locals and see how they have adapted to the landscape*

Supporting Project: National Indigenous Cultural Centre

Indigenous product is an integral part of the Australian tourism experience – a powerful industry that contributes significantly to the Australian economy each year and responsible for nearly 7.9% of its workforce . Visitors continually express an interest in Indigenous culture, especially in the Northern Territory (NT) , and while Australia is already home to a number of successful Indigenous owned and operated regional tourism experiences, there is no national showcase for Indigenous culture and knowledge.

Tourism Central Australia has proposed the development of the National Centre of Celebration of Indigenous Culture to develop an iconic Australian Indigenous tourism experience that will not only provide both domestic and international visitors with opportunity to immerse themselves in Indigenous cultural practices, but also support Indigenous training, employment and business creation outcomes. The centre is proposed to be a ‘living space’ incorporating features such as open space for cultural learning and exchange, technology that connects cultural centres from across Australia, a hub for Indigenous Town Rangers and Guides and an art space for “rotating” exhibitions.

This project needs a driver to proceed and will need significant investment in consultation and planning which should be progressed through the support of Government

Supporting Project: Upgrade the Uluru – Kata Tjuṯa National Park Cultural Centre

UKTNP is an Aboriginal owned national park jointly managed by its traditional owners and Parks Australia, lessee of the park. Approximately 345,000 domestic and international tourists visit UKTNP each year with 41% of visitors visiting between July and November (Winter + Spring) and 33% in March to June (Autumn) and 26% in December to February (Summer).

Many visitors to the Park arrive by plane at lunchtime, settle in at the resort and enter the park to watch the sunset. These visitors will then return to the resort for the evening to then return the following day to experience the sunrise. An interpretation Plan for UKTNP was prepared in 2001 and details the objectives and key messages of the interpretation through the Park. Interpretation is an ongoing process and needs constant monitoring, re-evaluation and updating.



EVENT INFRASTRUCTURE & SUPPORT

What's the need?

The highest daily yield of any sector of the tourism industry is produced by business events - \$212 per night in 2010, compared with \$136 per night for all overnight visitors in Australia.

Events provide opportunities to increase direct expenditure at a destination, contribute substantially to a destination's range of tourist attractions, facilitate media coverage, promote awareness of the destination for future visitation and lead to the construction of new facilities and infrastructure.

What is proposed?

The Telegraph Station in Alice Springs is an ideal location for events, launches, incentives and business events. For the site to be an effective events location investment is needed in:

- Toilet facilities
- A cycle path from town
- Lighting infrastructure; and
- Basic site hardening (generator pad, etc)

This investment would not only support the planned biennial cultural festival starting in October 2013 but would also allow the NT Convention Bureau to include the site as an outside events location and could be the host of walking and mountain bike events, or be used for the upcoming Ulysses rally.

Market Trends - Events

The Red Centre welcomes, on average, 71,000 cultural events visitors each year, with these visitors staying accounting for, on average, 623,000 visitor nights in the region each year.

The Red Centre welcomes approximately 12,600 domestic overnight visitors each year who attend a cultural event during the course of the visit. This represents 5% of all domestic overnight visitors to the Red Centre, and 3% of all domestic visitor nights each year in the region. The Red Centre maintains a 28% share of the Northern Territory's domestic overnight events market, this is, despite domestic events visitation to the Northern Territory, increasing by 56% within the last five years.

Approximately 575,000 international visitors who travel to the Red Centre indicate that they participate in an Event during their trip to Australia. This represents an increase of approximately 44% in event visitation from the international market to the region over the last five years. International event visitors to the Red Centre stay for an average of 9.7 nights in the Red Centre. This is an increase of 4.9 nights over the last five years.

Possible event leveraging opportunities:

- Tatts Finke Desert Race
- Alice Desert Festival
- Red centre Bird Festival
- Alice Springs Carnival
- Alice Springs Heritage Festival
- Australian Outback Marathon
- Ingkerreke Commercial MTB Enduro

CASE STUDY:

DIRT 'N' DUST FESTIVAL, JULIA CREEK

The Dirt n' Dust Festival has come a long way since its humble beginnings in 1993. Locals, who were trying to figure out how to put the small town of Julia Creek, Queensland on the map, came up with the idea that the area's hot and harsh climate was the perfect setting for a triathlon.

From there, a junior triathlon event was run and has now evolved to be a part of the Saucony Adventure Series for professional triathletes. Deemed to be one of the toughest triathlons in the country, triathletes and Olympians from around the world come each year to compete and enjoy the beauty of outback Queensland.

The weekend-long festival has now expanded to include horse races, nightly outdoor concerts, bog snorkelling, bull rides and a Red Claw Luncheon just to name a few, and was awarded the Best Festival and Event in Queensland at the Tourism Queensland Awards in 2009.

Last year, Dirt n' Dust saw around 2,500 visitors and brought in nearly \$700,000 worth of revenue.



2013 Julia Creek
Dirt and Dust Festival 19th, 20th and 21st April

QUEENSLAND TOURISM AWARDS 2010 Finalist

WINNER 2010 - OUTBACK QUEENSLAND TOURISM AWARDS



ENDANGERED SPECIES REVIVAL AND AWARENESS CENTRE

What's the need?

The concept behind Australia's National Landscapes embraces both tourism and conservation and the way they can be linked to mutual advantage. Many visitors to Australia's Red Centre wish to see the unique wildlife of the region in its natural habitat. This is difficult for a number of reasons including the nocturnal nature of most of the animals, the extreme rarity of some endangered species and the lack of any semi-controlled facility, other than Alice Springs Desert Park, where such observation is possible.

There is a need for the development of one or more places where endangered species can be managed for conservation both through protection from predators and where engaging stories are told. Such a centre goes part way to meeting the needs of central Australian Aboriginal people to have these species maintained on country.

The Red Centre welcomes approximately 330,000 overnight visitors each year who have had a wildlife encounter either in the region or (for the case of the international market) over the course of their trip. These visitors account for 67% of all overnight visitors to the Red Centre.

What's proposed?

There is an opportunity to assist with the survival of certain endangered species in Australia's Red Centre through providing safe areas that exclude the feral predators and competitors which represent a threat to these animals. At present UKTNP and Watarrka NP each have a small area set aside to assist in the preservation of one species, the Mala, *Lagorchestes hirsutus*.

Both areas have restricted public access due to keeping human-Mala interaction to a minimum. The current proposal would develop a partnership between landowners/land managers, a conservation NGO such as Conservation Volunteers Australia and their benefactors and an animal husbandry expert such as the Alice Springs Desert Park.

More specifically, a number of areas, say 2 or 3, of at least 100 ha in area, will have a maintained perimeter fence which excludes feral predators and competitors, in which land is managed to maximise success.

It would be populated with individuals from the endangered species of the area, for example, the following mammalian species.

- Burrowing Bettongs (*Bettongia lesueur*)
- Mala (*Lagorchestes hirsutus*)
- Numbat (*Myrmecobius fasciatus*)
- Bilby (*Macrotis lagotis*)
- Golden bandicoot (*Isodon auratus*)
- Brush-tailed Bettong (*Bettongia penicillata*)
- Spectacled Hare wallaby (*Lagorchestes conspicillatus*)
- Western Quoll (*Dasyurus geoffroii*)

The animal husbandry operational work required for protection would be minimal and the work required for presentation would be focussed around feeding regimes and interpretive guide training.

Areas which have been discussed for such a project include:

- UKTNP
- Katiti/Peterman Indigenous Protected Area near UKTNP
- Watarrka NP
- Ipolera



ENDANGERED SPECIES REVIVAL AND AWARENESS CENTRE

Subject to the degree of ongoing interest of the landowners in each case and the results of more detailed assessment drawing on zoological and ecological expertise, the project might involve all, some or just one of these sites.

Significant operational funds and support could eventually be generated by admission fees from visitors and from volunteers, but it would necessary to achieve a commitment for ongoing operational funds from a conservation focussed benefactor. Our initial research suggests that this would not be difficult to achieve to support a well managed facility operated by experienced professionals.



CASE STUDY: EASTERN BANDICOOT

The Eastern Barred Bandicoot (EBB) is an endangered species under the EPBC Act and only exists in a few reintroduced populations in Victoria. The EBB is threatened by the predation of foxes and cats and the loss of native grassland habitat. The survival of this species now depends on the successful reintroduction and management of captive populations.

In 2009, the Conservation Volunteers Australia (CVA) and Parks Victoria formed a partnership through the EBB Population Revival Program, to develop Woodlands Historic Park as the third location for EBB reintroduction. The goal of the program is to reintroduce a captive breeding population of EBB at Woodlands Historic Park by 2014, with a maintained perimeter fence limiting factors to success such as predation, over-grazing and habitat modifications. A 400 ha parcel of Red-gum Grassy Woodlands at the Woodlands Historic Park was identified as suitable habitat for the EBB and has been fenced as a Nature Reserve and site for the EBB Population Revival Program.

Four key stages of the program include:

1. To establish a community engagement program to ensure and maintain predator-proof fence integrity to eliminate predator and grazing pressure
2. Re-establish a grassland vegetative community appropriate for reintroduction of EBB
3. Breed and release a population of EBB into the 'back paddock' at Woodlands Park
4. Monitor, evaluate and report on success of program objectives

Table 4: Financial Support for Eastern Bandicoot Project

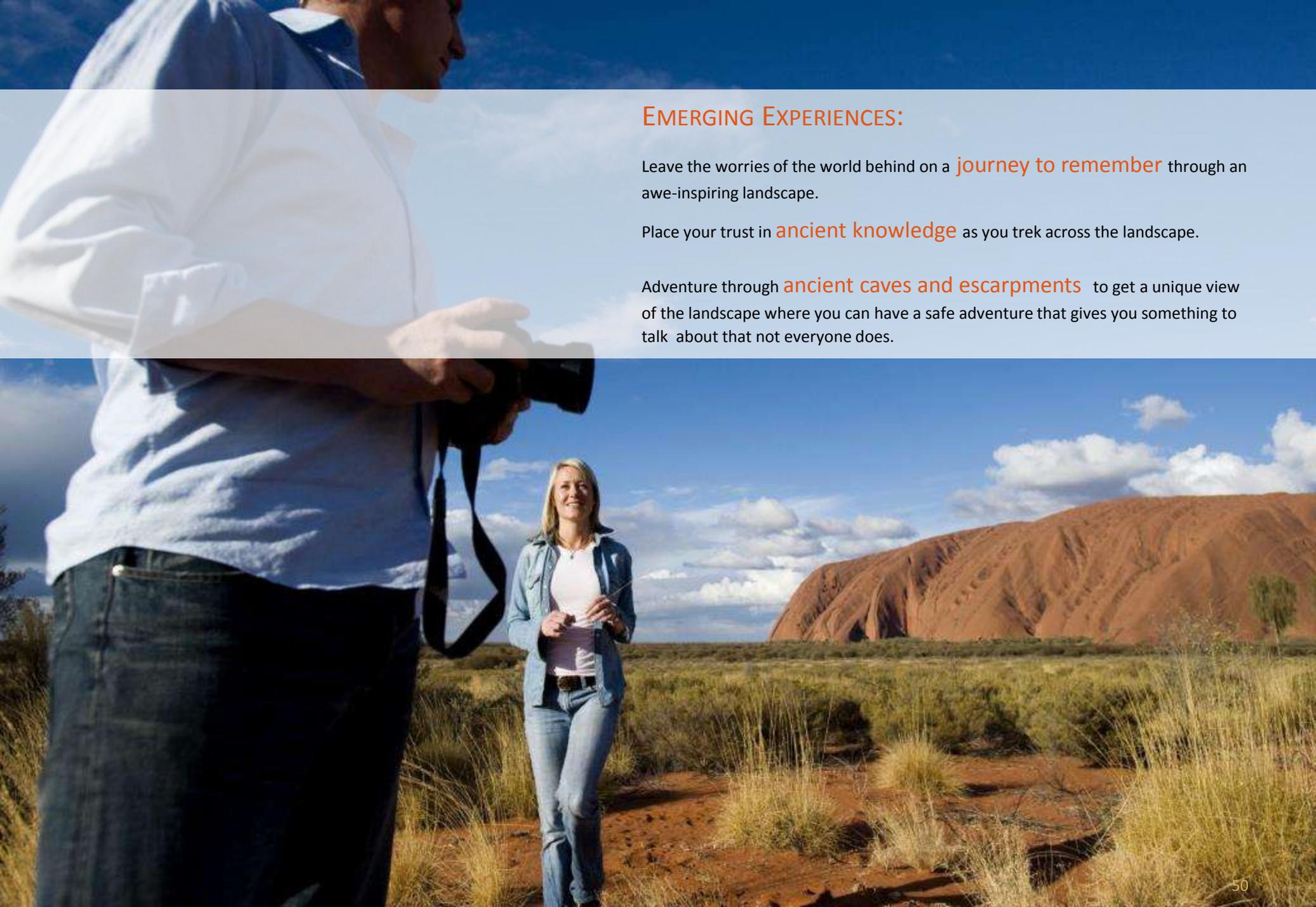
TYPE OF SUPPORT	VALUE
DONATIONS FROM 21 CORPORATE ORGANISATIONS	\$250,000
STATE GOVERNMENT GRANTS	\$50,000
IN KIND CORPORATE VOLUNTEERING	\$75,000
IN KIND COMMUNITY VOLUNTEERING	\$76,000

HERO EXPERIENCE #2 *Get to know the locals and see how they have adapted to the landscape*

KEY ACTIONS

Based on an assessment of the Priority and Supporting Projects, the table below outlines the key actions required to develop this Hero Experience in Australia's Red Centre. Each action is assessed on its level of priority as an immediate term (1-2 years), medium term (3 – 5 years) or long term (6+ years) action.

ACTION AREA	ACTION	TIMEFRAME	LEAD AGENCY
Priority Project #3 Infrastructure & Support	3.1 Review of existing events infrastructure by each Local Government	Short Term	Local Govt
	3.2 Prepare a joint submission for funding of identified infrastructure gaps	Short Term	Local Govt
Priority Project #4 Endangered Species Revival And Awareness Centre	4.1 Develop a partnership between landowners/land managers, a conservation NGO and their benefactors and an animal husbandry expert	Short Term	Parks NT (Desert Park)
	4.2 Seek government financial support for the Endangered Species Revival and Awareness Centre	Medium Term	ARCNL Steering Committee
	4.3 Identify and assess potential locations for the development	Medium Term	Parks NT
Emerging Projects	<i>Develop a Wildlife Voluntourism Project linked to business events</i>	Short Term	TCA
	Investigate the level of support and feasibility of a National Centre of Celebration of Indigenous Culture in Alice Springs	Medium Term	ASTC
	<i>Seek funding and support to upgrade The Uluṛu – Kata Tjuṛa National Park Cultural Centre</i>	Medium	Parks Australia



EMERGING EXPERIENCES:

Leave the worries of the world behind on a **journey to remember** through an awe-inspiring landscape.

Place your trust in **ancient knowledge** as you trek across the landscape.

Adventure through **ancient caves and escarpments** to get a unique view of the landscape where you can have a safe adventure that gives you something to talk about that not everyone does.

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There is no limit to the opportunities on offer as visitors journey through the Red Centre's vast and ancient landscape.

Visitors can take delight in scrambling over ancient escarpments, on the Larapinta Trail (along the spine of the West MacDonnell Ranges, through Simpsons Gap, Ormiston Gorge and Glen Helen Gorge).

A journey through the ancient Red Centre can also provide opportunities for visitors to place their trust in the ancient knowledge of the traditional custodians of the land. A walk around Uluru's base with an Anangu guide for example, can fill visitors with learning about how the ancient rock was created by spirit ancestors in the Tjukuritja.

There are also opportunities to journey across the landscape on four wheels or two wheels, and on four feet or two. Visitors can experience Uluru on a motorcycle, or from the back of a camel, they can join a 4WD tour along Mereenie Loop Rd, (which passes the sandy expanse of Finke Gorge National Park) or they can take it at a more leisurely pace with an abundance of guided walks across the region.

SUPPORTING EXPERIENCES

Listed below are experiences available within the landscape which can be used to support this Hero Experience

- Leave the worries of the world behind on an awe-inspiring **journey** through the desert landscape
- See the **world through new eyes** discovering the Red Centre through the culture of the Indigenous People of Australia and how it evolves through the seasons
- Give a little something back and **feel enriched** by the distinctive stories, art, and connection to the spiritual heart of Australia.
- **Share stories**, dinner and laugh with Indigenous hosts at their outstations around Uluru.
- Place your **trust in ancient knowledge** as you trek across the landscape, connecting with the Indigenous People of Australia.

EMERGING EXPERIENCES:

Leave the worries of the world behind on a **journey to remember** through an awe-inspiring landscape.

Place your trust in **ancient knowledge** as you trek across the landscape.

Adventure through **ancient caves and escarpments** to get a unique view of the landscape where you can have a safe adventure that gives you something to talk about that not everyone does.

PRODUCT DELIVERY

A number of tourism products already exist within the Red Centre National Landscape which support the Hero Experiences outlined above. These include:

- Anangu Tours
- Long Horn Bikes
- Sounds of Starlight Theatre
- Pyndan Camel Tracks
- UKTNP
- Adventure Tours
- Trek Larapinta
- Wayoutback Desert Safaris

PRODUCT GAPS

On analysis of the products currently available within the landscape which support the delivery of these Hero Experiences, the following product gaps have been identified.

- A mountain bike track network with event component
- Multi-day accommodated walking tracks
- Soft, natural adventure product
- Homeland stays , e.g. on IPA or the Katiti Land Trust
- Uluru based tourism hub promoting and servicing homeland stays

EMERGING EXPERIENCES

PRIORITY PROJECTS

The following two Priority Projects have been identified to support the Emerging Experiences:

- Leave the worries of the world behind on a **journey to remember** through an awe-inspiring landscape.
- Place your trust in **ancient knowledge** as you trek across the landscape.
- Adventure through **ancient caves and escarpments** to get a unique view of the landscape where you can have a safe adventure that gives you something to talk about that not everyone does.

Priority Project #5: Develop a world famous Mountain Bike track and event near Alice Springs or the West Macs

With the growing interest in mountain bike events and bike trails, Alice Springs has the vision to position itself as a national mountain bike centre, with a world-class track network and infrastructure to support cycling events.

Cycling as a tourism experience has been growing rapidly, with a number of agencies in the Red Centre recognising the potential of cycle tourism and committing to a range of cycle tourism experiences in various strategic plans within the region.

This is considered a viable Priority Project for the landscape as it is already based on strong community and industry support and offers significant economic and social benefits to the region.

Priority Project #6: Ilpurla Multi-day Accommodated Walk

The Ilpurla Trail crosses over some of the most stunning country in Central Australia. Located west of Hermannsburg, its added appeal is in traversing “country” that maintains the living pulse of its original inhabitants, the Western Arrernte people.

Tourism NT have recognised the importance of walking tourism and has already made this a priority in their Business and Industry Development plans.

With growing market demand for adventure experiences and journeys the key to success of this project is securing an operator who is willing to invest and as such this project should be included in a future well-planned ‘expressions of interest’ process subject to approval by the traditional owners and recognising an important part of any new agreement will be that the integrity of the Ilpurla Trail is maintained.

To build on the concept of walking trails, supporting walking projects will be investigated, particularly around the UKTNP (outlined as an emerging project overleaf)

These Priority Actions are explained in greater detail on the following pages

EMERGING EXPERIENCES

EMERGING PROJECTS

In addition to these Priority Projects, a number of Emerging Projects have been identified:

Supporting Project: A multi-day accommodated walk in or near Uluru-Kata Tjuṯa National Park (Supporting Project)

Bushwalking is the 8th most popular recreational activity undertaken by Australians. Walking trails create many benefits by attracting additional visitors and providing additional activities for those visitors. Developing longer walking trails increase the length of visitation to a region and enhances a visitors experience. This is especially the case with accommodated walking tours, providing a rejuvenating and challenging journey that many experience seekers would enjoy.

According to Tourism Northern Territory the best fit for a walking experience in UKTNP would be an overnight walk (2 days, 1 night) that would be commercially operated by one company that builds and operates the experience. Groups sizes for this walk would be small and the experience would be culturally enriching and not too physically challenging to ensure emphasis is placed on the cultural landscape. This walk would include creature comforts for a high end product that is exclusive and highly desired. This high end product would include eco lodges for luxurious accommodation.

There are, however, significant concerns about sacred sites and visitor safety and as such, a preferred pathway for this walk has not yet been identified.

Approval from UKTNP Board of Management and further discussions Traditional Owners would be required to address potential project constraints such as a viable path for walking through or near the park and avoiding sites of cultural significance.

There are no immediate barriers to this project other than the need for a strong push from the TOs for the desire for a project like this to proceed.

Supporting Project: Develop product for Homeland Visits and Associated Tourism Hub

Cultural tourism has become a major new area in the tourism industry with homeland visits increasing in popularity. The reason for this increase is the unique opportunity homeland stays provide visitors. Visitors can experience the authentic customs and stories of the host culture they seek but in the comfort of modern amenities.

For homeland stays (overnight) to become more widely sought after, a visitor needs to feel a sense of security and have adequate facilities provided to them. Another important aspect is an effective booking system and recognising that for many the homeland visit will only be a daytrip but the booking system should also make overnight stays more easily researched and booked.



Alice Springs Mountain Bike Experience (and Adventure Precinct)

What's the need?

On a global scale, cycle tourism is growing rapidly as visitors seek more engaging ways to experience new places, a more sustainable approach to travel and an increased awareness of health and fitness related benefits. Regional governments, councils and land managers are developing land into recreational areas to attract cyclists and capitalise on the economic benefits they bring.

A range of agencies including Tourism NT, Parks NT, Tourism Central Australia and the Alice Springs Town Council have recognised the potential of cycle tourism in the Red Centre and made a commitment to cycling through a range of strategic plans.

What will the result be?

Based on the experiences of developing Mountain Biking (MTB) in other regions; it is expected that benefits for the Red Centre may include:

- Increased awareness of the destination
- Increased visitation from niche market visitors (MTB enthusiasts)
- Opportunity for a hallmark MTB event
- Potential to partner/leverage events in other regions
- Opportunity to lengthen the traditional visitation period
- Central Australia has a variety of purpose built and designed tracks through spectacular landscapes and the local mountain biking community are extremely proactive with promotion of the sport and facilities. A number of cycle related businesses are already in place however our region seemed to lack the internal focus and collaboration needed to develop cycle tourism in the Territory.

Tourism Central Australia (TCA) has committed, under Tourism NT's Enhancement Funding, to engage the key stakeholders and facilitate the development of a Mountain Bike Action Plan for Alice Springs.

What is proposed?

With the growing interest in mountain bike events and bike trails, Alice Springs has the vision to position itself as a national mountain bike centre. While informal use of trails is apparent, there is a need to formalize the track network and the associated tenure and establish a complete network of graded trails .

Development of the MTB centre would include a number of key elements:

- Mapping of tracks and engaging with West Macs Traditional Owners for track network validation
- Formalisation and grading of the track
- Addressing concerns of user safety and public liability (e.g. transponders for overnight users)
- Development of a clear brand and marketing plan

The MTB precinct would be unveiled in two stages, with the telegraph station historical reserve in Alice Springs unveiled first, followed by an overnight ride in the West MacDonnell Ranges that would run parallel to the Larapinta trail. To position Alice as a MTB centre, the priority is to get the product sorted on the ground, then lobby for the marketing support. That includes getting the existing track network validated through engaging with the TOs (Lhere Artepe). Firstly to build their trust in the project and gain support through the Joint Management process for the trails. This builds on the trail audit currently underway.



ALICE SPRINGS MOUNTAIN BIKE EXPERIENCE (AND ADVENTURE PRECINCT)

Tenure issues will also have to be addressed, as the Telegraph Station sits beside a Joint Geological and Geophysical Reserve is a protected area managed in partnership with the US Defence Force and used for seismic activity research. This does not preclude its use for MTB however requires further discussion on conditions of use.

Further development (and possible realignment of trails) may be required to create a network of graded trails that can be accessed for FITs and events and promoted. Track development should also aim to avoid living areas. In terms of the West Macs overnight ride, the option exists to develop a multi-day accommodated trail with a loop back to Alice Springs.

Market Trends – Cycle

The most recent data released by Tourism Research Australia (YE December 2011) indicates that cycling is becoming an increasingly popular holiday activity for both domestic and international visitors to Australia. Cycling as a holiday activity has increased by 25% in the domestic market and by 17% in the international market.

These visitor activity numbers are in line with the information released by the Australian Bicycle Council which states that 'more people in Australia are cycling than ever before, with over 1.9 million people now cycling in Australia'. 2008 was the largest ever increase in people cycling in Australia and this trend continues.

From a Northern Territory perspective, the three major markets of NSW, VIC and SA all have strong adult cycling participation populations. 8.3% of NSW adults cycle regularly, 10.7% of Victorian adults cycle regularly and 8.4% of South Australian adults cycle regularly.

To facilitate this Priority Project is the formation of the MTB Steering Committee, appointment of the Project Champion and setting NT Government-wide priority to getting Alice Springs recognised as a MTB centre nationally.

CASE STUDY:

BIBBULMUN TRACK & MUNDA BIDDI TRAIL

The Bibbulmun Track is one of the world's great long distance walk track, stretching nearly 1000km from Kalamunda, a suburb in the outskirts of Perth, to the town of Albany on the south coast. This track is for walkers only, whether self-guided or in guided group, and is signposted with yellow triangular markers. The track caters for all experience levels from a gentle stroll to an eight week adventure. You can make it more of a wilderness experience by camping out or you can explore it in comfort using the varied accommodation in the towns along the way. The track takes walkers through forests, valleys, over boulders and along breathtaking coastal heathlands.

The Munda Biddi Trail, is a world-class 1000km nature-based off-road cycling experience. It is one of the few places left in the world where a 1000km trail could be built through undeveloped, natural landscape. Similar to the Bibbulmun Track, cyclists can decide to camp in shelters or stay in quint country towns.

The Bibbulmun Track is estimated to have around 434 736 visits spent on the track each year whereas the Munda Biddi Trail having approximately 20 000 cyclists on the trail each year.



ILPURLA MULTI-DAY ACCOMMODATED WALK

What's the need?

The Ilpurla Trail crosses over some of the most stunning country in Central Australia, located west of Hermannsburg, its added appeal is in traversing “country” that maintains the living pulse of its original inhabitants, the Western Arrernte people.

The seven day guided walk take visitors through the red sandstone and the rolling hills, plains and desert oak country stands south of the West MacDonnell Ranges. Beautiful gorges and endless views finally culminate in the extraordinary Palm Valley, where water bubbles up from secret springs and Ancient petroglyphs can be interpreted by Arrernte guides. In the year ending June 2012 there were approximately 8.3 million visitors who participated in walking activities across Australia. This large visitor group desire promotional material to help plan their trips, appropriate and informative signage, variety in the walking trails available, interesting landmarks and the ability to either challenge themselves or go their own pace to enjoy the experience with their family.

Tourism NT have recognised the importance of walking tourism and has already made this a priority in the Business and Industry Development work of the agency (planned to move across to Department of Business). Recent changes have seen the operator pull-out of running the walks and a new operator is sought.

What is proposed?

With the trail in place but not currently in use, there is potential for an EOI to put a product together and operate a multi-day accommodated walk.

TOs are looking for a commercial or joint venture partner to undertake this operation who can also provide the additional infrastructure required for this product. There are also potential linkages for the extension of the current trail into new locations.

It should also be noted that the sealing of the Red Centre Way Inner Loop would highly benefit this project, as it would provide more locations to pick people up, similar to that of the Great Ocean Road.

Market Trends – Experience Seeker

As outlined in Table 3 below, a number of the Red Centre’s key visitor markets, including the UK, USA, Germany and ‘other Europe’ are also markets that find natural/soft adventure pursuits appealing as holiday activities.

In addition, these niche experiences are also off appeal to a number of the region’s fastest growing Asian markets including Singapore (which has grown by 37% in the region since 2007) and China (which has grown by 51% nationally since 2007).



ILPURLA MULTI-DAY ACCOMMODATED WALK

Market Trends – Bushwalking

In the year ending June 2012 The Red Centre welcomed 212,570 bushwalking visitors. These bushwalking visitors accounted for approximately 43% of the total visitors to the Red Centre.

Over the past 5 years bush-walking visitation to the Red Centre has declined by 22% domestically and 29% internationally. Comparably bushwalking visitor trends in the Top End has remained stable domestically and declined internationally by 22%.



CASE STUDY:

MARIA ISLAND LODGE & WALK

Multi-award winning Maria Island Walk is a family owned and operated tourism experience which highlights authentic Tasmania and has been recognised for its environmental friendliness and leadership in the tourism industry. The four day walk through forests, along beaches and past historical remnants includes a champagne lunch on the last day and leaves ample time after a day's walk to swim and relax before dinner. To rest between walking days, there are two wilderness camps adjacent to the beach, with comfortable beds and basic necessities. On the last night, walkers are rewarded with a more luxurious stay in the restored colonial, heritage listed home of entrepreneur Diego Bernacchi.

The Maria Island walk operates between mid-October and the end of April. \$2150 per person covers all transport to and from the island, two guides, all accommodation, food, wine, national park passes and equipment.

RELEVANCE FOR AUSTRALIA'S RED CENTRE

The multiple accommodation options of the Maria Island Walk make it a good model for Australia's Red Centre to investigate for the adventurous and spirited travelers. At each location, 4 double or twin accommodation units are provided for guests and another one for the walking guides. The model of a combination of different, high quality but on-theme accommodation types means that landscape could adapt and add to existing facilities to create one or more walking, cycling or kayaking multi day itineraries. This model should be considered as special interest activities are nurtured and layered to boost the destinations appeal.

EMERGING EXPERIENCES:

KEY ACTIONS

Based on an assessment of the Priority and Supporting Projects, the table below outlines the key actions required to develop this Hero Experience in Australia's Red Centre. Each action is assessed on its level of priority as an immediate term (1-2 years), medium term (3 – 5 years) or long term (6+ years) action.

ACTION AREA	ACTION	TIMEFRAME	LEAD AGENCY
Priority Project #5 Alice Springs Mountain Bike Experience (And Adventure Precinct)	5.1 Mapping of tracks and engaging with West Macs Traditional Owners for track network validation	Immediate	Parks NT
	5.2 Formalisation and grading of the tracks	Short Term	Parks NT
	5.3 Development of a clear brand and marketing plan	Short Term	TCA
	5.4 Develop a strategy to address concerns of user safety and public liability (e.g. transponders for overnight users)	Medium Term	Parks NT
Priority Project #6 Ilpurla Multi-day Accommodated Walk	6.1 Building on the work already undertaken by CLC in engaging Traditional Owners, formalising land use agreements and seeking joint venture partnerships, seek expressions of interest to put a product together and operate a multi-day accommodated walk as part of the existing tourism infrastructure.	Short Term (subject to TO support)	DRDWP and CLC
	6.2 Support Traditional Owners who are looking for a commercial or joint venture partner.	Short Term	DRDWP
	6.3 Make the Ilpurla trail one of the Great Walks of Australia: a collection of the best iconic walk experiences Australia has to offer.	Medium Term	TCA / Tourism NT
Additional Support Programs	Develop an overnight walk (2 days, 1 night) that would be commercially operated by one company that builds on the experiences around the Uluru- Kata Tjuta National Park	Long Term	Parks Australia
	Building on the work already undertaken by CLC in engaging Traditional Owners, formalising land use agreements and seeking joint venture partnerships, develop opportunities for homeland visits (including overnight stays and an associated tourism services hub), including securing a family or community commitment to the project.	Long Term	CLC and DRDWP

RECOMMENDED PRIORITIES

In order of priority, the recommendations of the project team have been separated into Government Policy Initiatives, Government and Community Investment Priorities, and Commercial priorities and listed in order of importance based on the votes on the previous page:

Government and Community Initiatives

1. Endangered Species Revival and Awareness Centre
2. Encouraging homeland visits and stays
3. Investment in sealing the Red Centre Way Inner Loop (\$30M)
4. West Macs Parks Infrastructure
5. Upgrade the UKTNP Cultural Centre
6. National Indigenous Cultural Centre

Government and Commercial Investment Priorities

1. Mountain bike track and event coordination
2. Ormiston Gorge tented accommodation
3. Multi-day accommodation walk (Uluru to Kata Tjuta)
4. Events infrastructure
5. Wildlife Tourism Opportunities

Commercial Investment and Joint Venture Priorities

1. Ilpurla multi-day walk management and infrastructure
2. Ecolodge accommodation and walking tracks West Macs
3. Ballooning near the Rock
4. Voluntourism events and projects

To support the efforts of the stakeholders in Australia's Red Centre to see the Catalyst Project progressed a Market Sounding document has been prepared and distributed to national and international investors seeking their level of interest in the projects in order to better understand the next steps required.

The projects included in the Marketing Sounding are:

- *Mountain bike track and event co-ordination*
- *Ormiston Gorge tented accommodation*
- *Ilpurla multi-day walk management infrastructure*

PERFORMANCE MONITORING FRAMEWORK

One of the keys to achieving the vision for Australia’s Red Centre and driving the catalyst projects will be effective coordination, leadership and commitment by the lead agencies (local government, State and Commonwealth agencies) in partnership with the respective industry and community organisations of the region.

Coordination and leadership will be directed through Australia’s Red Centre National Landscape Steering Committee as outlined in Figure 8.

Table 2: Implementation of the EDAP – Roles and Responsibilities

ROLE	RESPONSIBILITY
Leadership	Australia’s Red Centre National Landscape Steering Committee
Coordination of project activities, communications, funding grant applications, sponsorship, liaison with TCA and Tourism NT, Parks Australia, Tourism Australia, other state and regional agencies and industry	Project Management Group of four (4) appointed Steering Committee members
Trade relations and communications, PR	Tourism Central Australia and Tourism NT working in close liaison with Project Management Group and Tourism Australia
Consumer marketing	Tourism Central Australia and Tourism NT working in close liaison with Project Management Group and Tourism Australia
Product Development	Coordinated by the Steering Committee but executed by the respective councils, TCA, Tourism NT, or economic and trade/industry development agencies

Figure 8: Implementation of the EDAP



Adapted from Australia’s Green Cauldron Experience Development Strategy, TRC (2012)



APPENDICES

THE EXPERIENCE SEEKER MARKET

Tourism Australia's research on what our key international markets are looking for (see Figure 9 below) shows that a combination of nature, journeys and coastal experiences has the broadest appeal (although cities and Aboriginal Australia also rated well in some markets). While it has not been done specifically for each National Landscape, it is possible to highlight key experiences from the markets we most attract. Australia's Red Centre attracts primarily Western markets - UK (14%), German (13%) and United States (13%). As shown in Figure 8 below the top three international markets (58%) look for:

- ✓ **Nature** (1st preference for all five);
- ✓ **Journeys** (2nd preference for all five);
- ✓ **Aboriginal Experiences** (3rd preference for tow of the markets)

Australia's Red Centre needs to play to its strengths with natural journeys and Indigenous experiences.

Figure 9: Tourism Australia's 'Experience Seekers' Market Breakdown



WHAT MOTIVATES THE EXPERIENCE SEEKER

In addition to researching what experiences key markets are seeking from their trip to Australia, Tourism Australia also conducted research on what experiences most motivate our key international markets to travel (see Table 3). This research shows that nature and journeys are consistently in the top two most popular experiences with coastal lifestyle consistently ranked in the top three. The UK, France and Germany were exceptions to this as the Outback ranked in the top three.

Table 3: Ranking of Experience Motivators for the International Market to Australia

	Concept Ranking											
	AUSTRALIA	NEW ZEALAND	UNITED STATES	UNITED KINGDOM	FRANCE	GERMANY	CHINA	SINGAPORE	INDIA	JAPAN	KOREA	MALAYSIA
NATURE IN AUSTRALIA	2	3	1	1	1	1	1	1	2	1	1	1
AUSTRALIAN JOURNEYS	1	1	2	2	3	2	2	2	1	2	2	2
AUSSIE COASTAL LIFESTYLE	3	2	3	4	5	4	3	3	3	3	3	3
OUTBACK AUSTRALIA	4	4	4	3	2	3	4	4	4	4	4	4
ABORIGINAL AUSTRALIA	6	7	7	5	4	5	6	7	5	5	5	6
AUSTRALIAN MAJOR CITIES	7	5	6	6	6	7	7	5	6	7	7	5
FOOD AND WINE	5	6	5	7	7	6	5	6	7	6	6	7

CONSERVATION VALUES

Australia's Red Centre National Landscape was awarded with Australia's prestigious National Landscape status for its iconic cultural, natural and spiritual values .

Table 4 below identifies these conservation values and their corresponding threats as well as provides possible solutions to overcome such threats.

Table 4: Australia's Red Centre Conservation Values

VALUES	THREATS	REMEDIES
ENVIRONMENTAL		
Ancient iconic rock formations (e.g. Uluru, Kata Tjuta)	<ul style="list-style-type: none"> • Degradation • Global Warming • Misuse 	<ul style="list-style-type: none"> • Education programs on protection and proper use for visitors/industry
Native and rare species (e.g. Southern Marsupial Mole, Legless Lizard, Great Skink)	<ul style="list-style-type: none"> • Some listed as endangered (IUCN) • Development • Global Warming • Poaching? 	<ul style="list-style-type: none"> • Conservation programs • Education programs on protection for visitors/industry
CULTURAL		
Traditional Owners and their significant spiritual connection to the region	<ul style="list-style-type: none"> • Loss of spiritual significance from unmanaged tourism • Traditional values vs. tourism values 	<ul style="list-style-type: none"> • Partnerships with Traditional Owners, Parks Australia, Tourism Australia and industry

¹ ARC NL Destination Positioning Guidebook, Tourism Australia (2012)

THE CONSULTATION PROCESS

The success of initiatives of this EDAP were dependent on the ability of a range of stakeholders to get involved and gain local buy-in. To help achieve this, four main deliverables were communicated to a broad audience throughout the project:

- *Project Factsheet*
- *Experience Development Action Plan*
- *Directions Paper*
- *Market Sounding Report*

The key points outlined in the table below outline the sign-off and buy-in process.

STEERING COMMITTEE AND STAKEHOLDER SIGN-OFF	Project Management Group (PMG)	TA/PA/TNT	Steering Committee	Other Stakeholders	RET
Phase 1 - Mobilisation					
Draft Project Plan	✓	✓	✓		✓
Mobilisation Workshop			✓		
Final Project Plan	✓	✓	✓		✓
Project Fact Sheet	✓	✓			✓
Phase 2 - Desktop Audit and analysis					
Preliminary Directions Paper	✓		✓		
Steering Committee Workshop			✓		
Input to Draft Directions Paper		✓	✓		
Draft Directions Paper and survey for input	✓	✓	✓	✓	
Phase 3 - Refining Catalyst Projects					
Directions Paper & Survey to broader Stakeholder Group	✓			✓	
Collation of Stakeholder feedback on catalysts for agreement	✓	✓	✓		
Agreement on Catalyst Projects	✓		✓		
Interim Report	✓	✓	✓	✓	✓
Phase 4 - Draft Experience Development Action Plan (EDAP)					
Pre Feasibility of Catalyst Projects	✓	✓	✓		
Draft EDAP	✓	✓	✓		
EDAP Workshop		✓	✓		
Draft EDAP for consultation	✓				✓
Phase 5 - Final EDAP and Market Sounding Report					
Collation of feedback on EDAP	✓		✓		
Draft Final EDAP	✓	✓	✓		
Final EDAP	✓				✓
Draft Market Sounding Report	✓	✓	✓		
Final Market Sounding Report	✓		✓		✓

THE CONSULTATION PROCESS – KEY PLAYERS

Project Team

Mark Olsen (lead), Rick Murray (Middle Star), David Liddell (EC3 Global), Janet Mackay (TRC – Project Manager with RET)

Project Management Group

Michelle Harwood (Acting Chair), John Stafford (Tourism NT), Jeff Huyben (TCA), Dianne Scopel (CLC), Christine Burke (Parks Australia), and Chris Day (Parks NT)

Steering Committee

Project Management Team plus Anneke Rose Red Hot Arts, Damien Ryan (ASTC), Ian Dickson (IBA), Kay Eade (Chamber of Commerce), Mark Crummy (Parks NT), Kathleen Anderson (DEEWR), Ren Kelly (DEEWR), Rex Mooney (ASTC), Ann Jacobs (DLP), Diane Hood (MSC), Patty Worboys (Parks Australia), Philip Watkins (DesArts), Norbert Patrick (CDSC) and Roydon Robertson (CDSC)

Australia's National Landscapes Program Implementation Committee

Helen Cox (Chair – RET), Hilary Schofield (Parks Australia), Ingrid Johnson (Tourism Australia), Carl Solomon (Nat Landscape Steering Committees), and Tania Willis (RET)

Other stakeholders consulted:

- Andrew Simpson, Mission Solutions
- Kathy Graham, SEiT
- Anita Meyers, OnTour
- Phil Taylor, Wayoutback
- Krystal Perkins, All the Perks
- Laurelle Halford, TCA
- Ernie Wanka, NT Govt
- Cara George, Voyages Indigenous Tourism Australia
- David Adler, Astrophere