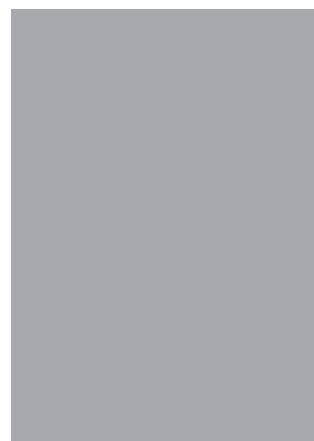
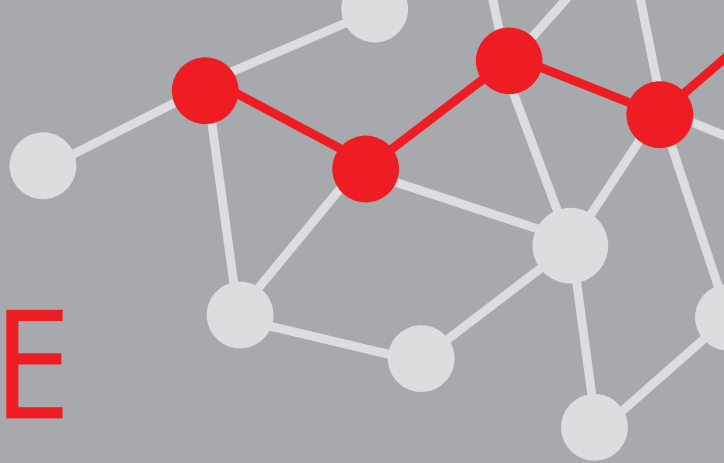


ADVOCACY AT WORK

A YEAR IN REVIEW 2015-2016



CEO'S MESSAGE



There has never been a more exciting time to be a member of the Tourism & Transport Forum Australia (TTF). The Australian economy is continuing its transition from the mining boom to a more diversified service-based economy. In this context, Government is looking to industry organisations such as TTF for leadership and support on the policy reform agenda Australia needs to pursue to meet our potential.

Australia's visitor economy has a great economic, social and environmental story to tell. While other industry sectors are struggling in the economic transition, our sector is thriving. Last year, more than 6.9 million overseas visitors travelled to Australia (up 8 per cent), stayed for a collective 248 million nights (up 11 per cent) and spent \$36.6 billion (up 18 per cent).

The Chinese love affair with our beautiful island nation has been spearheading the surge. More than one million Chinese visitors now travel to Australia each year and they are spending \$8.3 billion in our shops and restaurants, on our hotels and accommodation and our vibrant tourist attractions.

But it's not just international visitors who are exploring all that Australia has to offer. More Australians than ever are travelling in their own backyard and contributing to a robust domestic visitor economy – 87.1 million overnight trips (up 7 per cent), 322 million visitor nights (up 4 per cent) and \$57.9 billion in expenditure (up 6 per cent) was contributed to the Australian economy by domestic travellers.

These strong results could not be achieved without the commitment and investment of our members in Australia's visitor economy. Without our planes, cruise ships, airports and seaports, without the train, bus, light rail, ferry and car-hiring providers, developers, investors and freight logistics, and without the choice of accommodation and hospitality offerings, tourist attractions – both natural and man-made –

cultural institutions and array of major and business events that compel people to travel, none of this would be possible.

The tourism sector has the potential to do even better if we put the visitor economy at the heart of economic decision-making in Australia. We cannot stand still. This is one of the most competitive sectors in the world.

Government cannot assume that the industry's current success provides a blank cheque for fee and tax hikes. TTF has been a vocal opponent of the backpacker tax, rising visa fees and the holiday tax levied on every visitor through the Passenger Movement Charge. These are the types of challenges which TTF confronts on behalf of our membership. With determination and methodical advocacy supported by thoughtful research pieces, we can influence the Government to rethink its position and take positive action to support Australia's visitor economy.

Advocacy at Work highlights what we have achieved together, the policy development, public advocacy, events and communication activities that have again demonstrated the power and influence of our collective union through the Tourism & Transport Forum Australia.

I thank you for your continuing support and look forward to another year together building a stronger industry that will be recognised in its rightful place as a key economic pillar that will support the success of our nation and our people for decades to come.

Margy Osmond
Chief Executive Officer



CONNECTING MEMBERS: OUR EVENTS

FLAGSHIP EVENTS



FEDERAL LEADERSHIP SUMMIT

The TTF Leadership Summit is held annually in Parliament House, Canberra, and facilitates dialogue between political leaders, policy-makers and TTF's members from the tourism, aviation and transport industries.



AUSTRALIAN TRANSPORT SUMMIT

The annual Australian Transport Summit brings together transport operators, government agencies, academics and key decision makers to consider the major policy challenges and opportunities in the public transport sector. The Summit is held in partnership with the International Association for Public Transport Australia New Zealand (UITPANZ).



OUTLOOK TOURISM INDUSTRY & POLICY CONFERENCE

The Outlook Tourism Industry & Policy Conference brings together approximately 150 CEOs and senior executives from Australia's leading companies in the hotel, aviation and tourism sectors to consider trends and opportunities in the visitor economy.

PREMIUM EVENT SERIES

FRIENDS OF TOURISM

The Friends of Tourism groups bring together Members of Parliament from Government and Opposition at the Federal and State levels to support and recognise the importance of the visitor economy.

INDUSTRY COCKTAILS

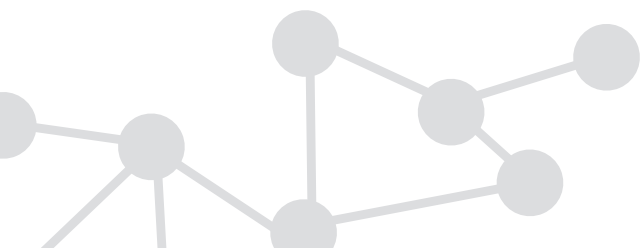
TTF hosts a number of industry cocktail receptions throughout the year. Each event features a political or business leader keynote speaker, including Prime Ministers, Federal and State Ministers, State Premiers and senior leaders within our sector.

TTF WOMEN'S BUSINESS CIRCLE

The TTF Women's Business Circle series, now in its second year, has the primary objective to provide the opportunity for women in the sector to come together and engage in discussion on issues relevant to the national agenda in an exclusive forum. Each event features prominent business and political leaders.

MEDIA AND COMMUNICATIONS

A strong presence across Australia's broadcast, print, and online media speaks to TTF's credibility as a sought-after commentator on tourism, transport and aviation issues. Our media activity helps promote the value of these sectors and this profile is critical to our ability to influence debate in the public sphere.





RESEARCH

TTF's public commentary, policy development and advocacy efforts are underpinned by industry and consumer research undertaken by TTF, a selection of specialist TTF members and external service providers. Looking beyond the contribution of TTF's research desk to the development of policy development and industry commentary, the following publications have been released (or pending at time of publication):

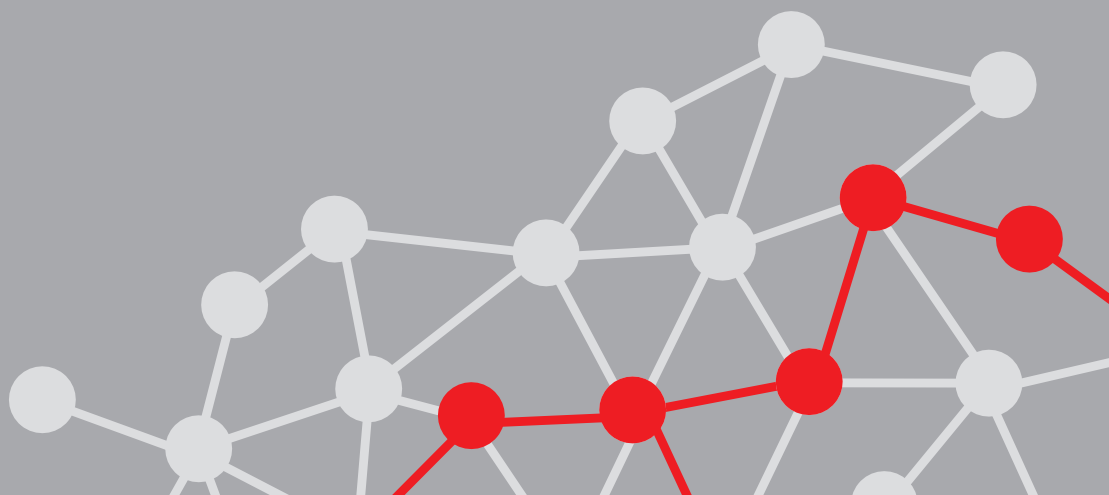
- Nature-based Tourism in Australia
- Cultural and Heritage Tourism in Australia
- Overseas Arrivals by Airports (and Overseas Arrivals by Airports for Key Rental Vehicle Markets)
- Estimating the Value of Visitor Spending in National Landscape Areas
- The Case for Destination Marketing in Australia
- Tourism for Tomorrow's Economy: The Need for a Future Economy Strategy

TTF is also represented on Tourism Research Australia's Tourism Forecasting Committee (the body tasked with overseeing official forecasts for the Tourism Industry).

ELECTION AGENDAS BUDGET ANALYSIS AND BUDGET SUBMISSIONS

TTF advocates on behalf of members through the annual budget submission process of Australia's Federal, State and Territory Governments. Our detailed submissions argue the case for greater Government investment in Australia's tourism, aviation and transport sectors to build a stronger visitor economy.

- Pre-budget submissions for the 2016-17 State Budgets in New South Wales, Victoria, Queensland, Australian Capital Territory, Western Australia, Northern Territory, South Australia and Tasmania
- Pre-budget submission to the Federal Budget 2016-17
- Comprehensive budget analysis of the 2015-16 Federal, State and Territory budgets





AVIATION

Air transport connectivity lies at the very heart of Australia's visitor economy. TTF has been the leading advocate for freeing the aviation sector from constraints, creating the conditions for growth and improving the passenger experience.

TTF'S POLICY GOALS FOR AVIATION ARE TO:

- Facilitate demand for travel to and within Australia
- Boost investment in aviation infrastructure
- Enhance the passenger experience
- Improve the competitiveness of Australia's air transport industry
- Promote ground transport connectivity at Australian airports
- TTF Aviation Policy Panel 2015 and 2016
- Developing a major report on improving the international visitor experience at the border
- Engaged with the National Passenger Facilitation Committee and Aviation Industry Advisory Group to advocate for improvements in the passenger experience at Australia's borders
- Engaged with the Tourism Visa Advisory Group to advocate for reforms to Australia's visa offering

INFLUENCING THE DEBATE

Research and Policy Development

- NT Aviation Industry and Services Strategy 2020 submission
- New Zealand Border Clearance Levy submission
- Western Sydney Airport draft EIS and Airport Plan submission
- Airport Curfew Administration Arrangements submission
- Released TTF Election Spotlight paper on Australia's competitive position on visa policy and opportunities for reform

Advocacy

- Secured the establishment of premium border clearance services
- Secured no new visa fee increases in the Federal Budget 2016
- Halted the Federal Government plan to change cabotage policy
- Secured 10 year multiple entry visa for Chinese travellers
- Secured three year multiple entry visa for Indonesian travellers
- Abolished the requirement for international travellers to complete Ebola form upon arrival in Australia



"TTF uniquely brings together airlines and airports with the broader tourism industry to collaborate on strategy and reforms to grow tourism and business. TTF ensures that our industry is part of the national debate on the challenges and opportunities shaping our collective future by representing our views to key decision-makers."

KERRIE MATHER, MANAGING DIRECTOR & CHIEF EXECUTIVE OFFICER, SYDNEY AIRPORT



TRANSPORT

TTF continues to be a strong voice for the role of better transport networks in the productivity and liveability of our cities. Transport and tourism walk hand in hand, improving connectivity, accessibility and regional dispersal.

TTF'S POLICY GOALS FOR TRANSPORT ARE TO:

- Ensure strong investment by State and Federal Governments in public transport and road infrastructure
- Increase private sector involvement in the delivery of public transport
- Promote best practice and innovation in customer service for public transport passengers, particularly through the adoption of new technology
- Support the dynamic and growing cruise ship sector
- Improve the regulatory environment for rental vehicles and point-to-point transport providers, including the taxi and ride-sharing industries

plan for how transport networks can better support the visitor economy in Queensland

- TTF Transport Policy Panel 2016

Advocacy

- Stimulated a change in Federal Government attitude to support public transport, including \$50 billion in infrastructure programs announced in the Federal Budget 2016
- Secured the agreement of the New South Wales Government to develop a combined tourism and transport strategy which was first proposed by TTF in our transport agenda for Sydney
- Advised the Queensland Government on a dedicated Tourism and Transport Strategy
- Campaigned for Federal funding for Gold Coast Light Rail Stage 2
- Advocated for the Victorian Government to commit to providing 20 new E-class trams each year to rejuvenate their fleet
- Campaigned for and secured the location of an underground metro station at Barangaroo as part of the new Sydney Metro rail line
- Advocated for game changing projects that will help transform our cities including: the Brisbane Cross River Rail, Sydney Metro and Melbourne Metro; light rail routes for the Sydney CBD and Eastern Suburbs, Parramatta and Western Sydney, the Gold Coast, Perth and Adelaide; and a multi-modal transport system for Newcastle
- Championed Federal Government support for a fast rail link between Sydney CBD, Parramatta and the Western Sydney Airport at Badgerys Creek

INFLUENCING THE DEBATE

Research and Policy Development

- Launched a TTF major report, *On the Buses: The Benefits of Private Sector Involvement in the Delivery of Bus Services*, prepared in partnership with L.E.K, on the economic benefits of franchising publicly-operated bus networks
- Launched the first edition of the *TTF L.E.K. Transport Barometer*, and progressed the second edition
- Advocated for a level-playing field and regulatory framework for ridesharing in our *NSW Point to Point Taskforce* submission (taxi industry and Uber)
- Progressed a major research project on public transport ticket pricing and its impact on patronage and revenue
- Progressed the *Queensland Tourism on the Move: An Integrated Tourism and Transport Strategy* – a detailed



"TTF is at the forefront of advocating for greater investment in transport infrastructure in our major cities and tourism regions. A vibrant visitor economy depends on an efficient and effective transport system and TTF is a strong champion of providing industry with a greater level of certainty and confidence on the major infrastructure projects in the pipeline across our cities and regional centres. TTF's ongoing thought leadership and research in the transport sector is an important part of ensuring that Australia embraces world's best practice to provide the best visitor experience and the best infrastructure we can."

SIMON BARRETT, PARTNER & CHAIRMAN, L.E.K. AUSTRALIA



TOURISM

TTF champions the role of tourism as a creator of jobs and economic growth for Australia with a comprehensive advocacy agenda to boost the visitor economy.

TTF'S POLICY GOALS FOR TOURISM ARE TO:

- Increase recognition of tourism as a driver of economic growth and jobs
- Grow demand for travel to and within Australia
- Boost investment in tourism infrastructure
- Enhance the visitor experience
- Improve the competitiveness of Australian tourism and increase funding for promotion
- Expand the tourism workforce

INFLUENCING THE DEBATE

Research and Policy Development

- Launched a TTF major report on building the economic case for further investment in destination marketing by Governments
- Launched a TTF policy paper on short-term holiday letting to inform the New South Wales parliamentary inquiry into the adequacy of short-term holiday letting regulations
- Working with the Victorian Government on its Visitor Economy Review
- Member of the City of Sydney's Visitor Accommodation Reference Group which was instrumental in the development of the City's Accommodation Action Plan
- Submission to the Productivity Commission's inquiry into Barriers to Service Exports with TTF's recommendations being referenced throughout the Commission's final report
- Submitted a response to the Federal Government's draft International Education Strategy, outlining the economic value and broader visitor economy implications of international education
- Hosted a Tourism Accommodation Workshop in 2016 to discuss the industry's proposed regulatory framework of short-term holiday letting

- Hosted a Nature-based Tourism Panel in 2016 to discuss TTF's policy framework and advocacy agenda for nature-based infrastructure and marketing

Advocacy

- Encouraged the appointment of a dedicated Federal Minister for Tourism in the Turnbull Coalition Government
- Advocated for and achieved a hold on any increases in visa fees and the Passenger Movement Charge in the Federal Budget 2016
- Secured additional occupations to be included in the Seasonal Worker Programme Tourism Pilot and implementation of other initiatives as part of the Northern Australia White Paper
- Secured additional tourism and events funding from the New South Wales Government to a record total of \$176 million
- Protected Sydney's iconic Bridge Street sandstone buildings for use as world-class luxury visitor accommodation by international hoteliers Pontiac Land Group
- Achieved a funding commitment from the Victorian Government for the expansion of the Melbourne Convention and Exhibition Centre, to ensure it remains competitive domestically and internationally
- Advocated for the reinstatement of tourism marketing funding and a commitment over the forward estimates in Queensland. Tourism and Events Queensland secured \$400 million over four years in the 2015-16 Budget.
- Promoted Tasmania's EOI process for nature-based tourism investment as an example of best practice sustainable tourism development in Australia
- Campaigning for reform of the Tourism Refund Scheme to increase its attractiveness to international visitors and boost retail sector spending
- Spearheaded joint tourism and agriculture sector representations to the Federal Government on the treatment of working holiday makers for taxation purposes.



"TTF is leading the charge on placing Australia's visitor economy at the heart of the national policy agenda. TTF plays a crucial role in defending our industry from short-term political opportunism, while campaigning for reforms that will help us realise the true potential of tourism and events. Due to the efforts of TTF, Australia's visitor economy is increasingly recognised as one of the most important sectors that will secure the economic growth and job creation Australia will need in coming decades."

SIMON MCGRATH, CHIEF OPERATING OFFICER PACIFIC, ACCORHOTELS



LEADERS' LUNCHEONS CHAIRMAN'S DINNERS

TTF Leaders' Luncheons are an important opportunity for our members to meet decision makers across the political, business and media spectrums and engage in dialogue on matters affecting their businesses. These intimate events are hosted by our members in capital cities across Australia.

The exclusive TTF Chairman's Dinner series is hosted by TTF's Chairman for member Chairs and CEOs with a leading business figure guest speaker featured at each event.

Our guest speakers represent the who's who of the influential. In 2015 our speakers* included:

Hon Anthony Albanese MP | Shadow Minister for Infrastructure & Transport; Shadow Minister for Cities and Shadow Minister for Tourism

Hon Stuart Ayres MP | New South Wales Minister for Trade, Tourism and Major Events; Minister for Sports

Senator the Hon George Brandis QC | Attorney-General; Minister for the Arts

Rt Hon Robert Doyle | Lord Mayor of Melbourne

Sir Rod Eddington AO | Chairman, Victorian Major Events Company

Hon John Eren MP | Victorian Minister for Tourism and Major Events

David Gallop | Chief Executive Officer, Football Federation Australia

Greg Hywood | Chief Executive & Managing Director, Fairfax Media

Michael Issenberg | Chairman and CEO, Accor Asia Pacific

Hon Kate Jones MP | Queensland Minister for Education and Minister for Tourism, Major Events, Small Business and the Commonwealth Games

Terry Moran AC | Chairman, Barangaroo Delivery Authority

Clover Moore | Lord Mayor of Sydney

Mike Mrdak | Secretary, Department of Infrastructure and Regional Development

Hon Mike Nahan MLA | Treasurer of Western Australia; Minister for Energy; Minister for Citizenship and Multicultural Interests

John O'Sullivan | Managing Director, Tourism Australia

Katie Page | Managing Director, Harvey Norman and **Gerry Harvey** | Chairman, Harvey Norman

Hon Curtis Pitt MP | Queensland Treasurer; Minister for Employment and Industrial Relations; Minister for Aboriginal and Torres Strait Islander Partnerships

Andrew Scipione APM | Commissioner of Police, NSW Police Force

Hon Ian Walker MP | Queensland Minister for Science, Information Technology, Innovation and the Arts

** Titles correct at the time of the event*

Tourism & Transport Forum

Suite 6.02, Level 6, 7 Macquarie Place, Sydney NSW 2000
T | +61 2 9240 2000 E | contact@tff.org.au www.tff.org.au



Tourism & Transport Forum



@TTFAus

