Regional Development Australia

Fitzroy and Central West Inc.

Central Queensland Tourism Industry Engagement Framework Scoping Study

2011-2012

Summary

Regional Development Australia Fitzroy and Central West Inc (RDAFCW) in its capacity as a facilitator of change and conduit between governments and Central Queensland communities has commissioned this Scoping Study (Central Queensland Tourism Industy Engagement Framework).

This was conducted so as to better understand the complex dynamics of an industry that effectively contributes $40 billion to Australia's Gross Domestic Product and some $9.2 billion[1] to the Queensland economy.

RDAFCW in its role recognise the importance of achieving a fully-comprehensive understanding of the tourism industry dynamics in the region and intend to establish a Regional Tourism Industry Engagement (interface) Framework (RTIEF). The RTIEF will acknowledge the vitality of intellectual capital and as an input enable RDAFCW to effectively and efficiently execute its role in supporting relevant regional growth plans and strategies.

A key role of RDAFCW is to support and disseminate information on government policy initiatives that will benefit the local communities and in this case relevant industry. However on the flip-side, RDAFCW in consultation with Central Queensland communities and key stakeholders (RTIEF) will articulate (bottom-up) reporting processes aimed at contributing to a more enhanced regional policy development.

The intended engagement framework will support Central Queensland regional growth plans and strategies whilst at the same time providing the RDAFCW Committee with industry currency and a level of transferrable assurance that all information gathered to support reporting processes are in fact current, credible and fully inclusive of the industry landscape.

1 Tourism Satellite Accounts STCRC 2007-2008

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Regional Development Australia Fitzroy and Central West – Reputation Imperative

The engagement framework rationale takes into consideration the Reputation Imperative[2] of the RDAFCW Committee, recognising the increasing importance being placed on governance ethics, with external stakeholders being more prepared than ever before to hold stakeholder partnerships accountable for their actions.

RDAFCW does not confuse reputation and brand as if they were one of the same and in a concerted effort to maintain credibility to the national RDA brand and local reputation of the organisation, RDAFCW will make every effort to maintain principles of currency, transparency and credibility.

Definition

The Scoping Study is concerned with the Regional Tourism Industry in Central Queensland. (Fitzroy and Central Western Queensland)

The definition of Regional Tourism used for this Scoping Study is based on the cross-border alliances of existing Regional Tourism Development practitioner organisations that include:

» Capricorn Enterprise

» Gladstone Area Promotion and Development Limited

» Outback Tourism

For the purposes of this document RDAFCW will acknowledge the Tourism Queensland boundaries[3] (Central Queensland and Central West Outback) and will base the intended engagement framework on the recognised boundaries of RDAFCW which clearly aggregate both, Tourism Queensland region of Central Queensland and Western Queensland Outback.

Background

Regional Development Australia (RDAFCW) is a partnership between the Australian, State and Local Governments to develop and strengthen regional communities. It will have a pivotal role in ensuring the long-term sustainability of the region.

RDAFCW, in consultation with the community, business, not-for-profit organisations and all levels of government will articulate local priorities, identity and align resources, engage stakeholders and promote solutions. In doing this RDAFCW will support the growth and development of Central Queensland communities.

RDAFCW will support, promote and disseminate information on government policy initiatives for the benefit of local communities and will act as a conduit between the region and the Australian and State Government facilitating the transfer of knowledge via the aligned Local Government agencies.

2 RDAFCW Corporate Policy

3 Tourism Queensland Tourism Opportunity Plan 2009-2019

The purpose of the Central Queensland Tourism Industry Engagement Scoping Study is to identify key Central Queensland Tourism Development organisations and establish a credible and efficient engagement framework and bottom-up reporting process. This will deliver current and valid industry feed-back to Regional Development Australia Fitzroy and Central West Inc. The framework will also enhance RDAFCWs communication framework for the dissemination of information on complimentary government policy and programs.

The noted Scoping Study is not intended to analyse the strategic intentions of key industry stakeholders but rather identify them and their individual and collaborative efforts so as to better understand the future planning of the industry sector that will have the potential to contribute/detract to both the local and national economies.

A number of options will be presented in an effort to identify an effective and efficient framework that meets the high-level assurance philosophy adopted by RDAFCW.

Models explored include:-

1. Highly Centralised Model – where all knowledge transfer (input/output) is aggregated by a single entity
2. Centralised Collaborative Model – where all knowledge transfer (input/output) is aggregated by a single nominated industry entity
3. Decentralised Collaborative Model – where knowledge transfer (input/output) is aggregated by an independent yet related entity
4. Highly Decentralised Model – where knowledge transfer (input/output) is aggregated by an independent unrelated entity

Option 1. Note that this option has the potential to become unintentionally pattern obsessive in collaboration with minimal change implications.

Option 2. Note that this option has the potential to maintain the status quo for the sake of continuity.

Option 3. Note that collaboration evokes debate and rigorous process.

Option 4. Note that collective intelligence is diluted.

The interpretation noted above suggests that Option 3 (Decentralised Collaborative Model) would maximise participation and invoke rigour and innovation.

RDAFCW will encounter a diverse range of scenarios where healthy debate will provide knowledge transfer that has endured a rigorous process thereby ensuring that risk management guidelines are considered and the highest level of assurance is transferrable.

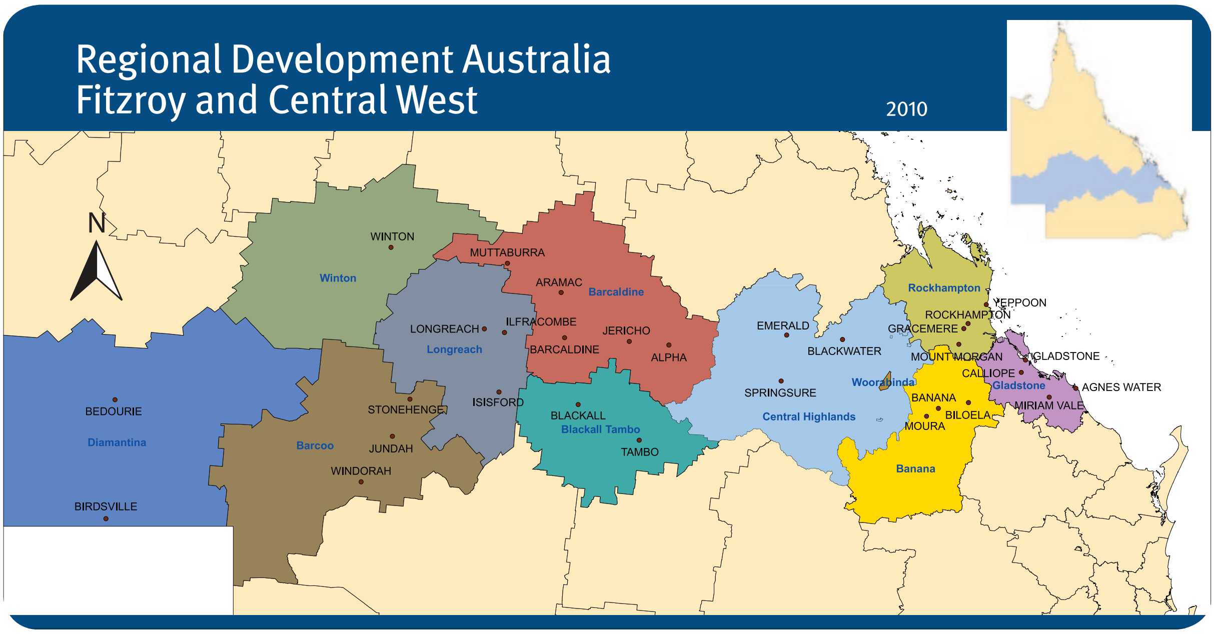
Options 1, 2 and 4 will provide a generic guide in managing risk with Option 3 enabling prescribed and required risk management treatments.

Option 3 will achieve:-

» Knowledge transfer; (un-sanitised)
» More confident and rigorous basis for decision making and planning
» Better identification of opportunities and threats
» Gain value from uncertainty and variability
» Pro-active rather than re-active response
» Efficient and effective practice
» Improved stakeholder confidence
» Enhanced decision making practices

01 : Regional Tourism Industry – Central Queensland

For the purposes of this document RDAFCW will acknowledge Tourism Queensland boundaries[4] (Central Queensland and Central West Outback) but will base the intended engagement framework on the recognised boundaries of RDAFCW which clearly aggregate both, Tourism Queensland's region of Central Queensland and Western Queensland Outback.



It appears that logistical boundaries stimulated regional parochialism which would explain the more traditional aggressive acquisition traits opposed to the more favourable contemporary traits of prudent cooperation regionally.

Although the more contemporary direction of regional cooperation is preferred and in line with integrated regional planning models, one must first consider why there is 'reluctance to change' and why does, cautious parochialism still exist. There is the obvious links to the stimulation caused by logistical and governmental boundaries but more importantly because of loyalty to the economic purpose of a community that bought about their initial establishment and existence.

The intended industry engagement framework is not designed to facilitate cultural change but more simply establish an integrated engagement practice that respects and considers the aspirations of all stakeholders and encourages integration, collaboration and sustainable development across the broad tourism and secondary business landscapes of Central Queensland

4 Tourism Queensland Tourism Opportunity Plan 2009-2019

02 : Tourism Overview

Located on the Tropic of Capricorn, Central Queensland (Fitzroy and Central Western Queensland) is recognised nationally as a major growth region with unlimited potential. Ideally positioned between the reef to the resource and agricultural sectors and beyond to the beefed-up 4x4 last frontier of the Remote Central West.

Whilst tourism has grown modestly over past decades the global market view[5] (*Tourism Australia 2010*) now dictates - that due to emerging new destinations, the growth factor is slowly becoming increasingly more competitive. In response to this increased competitiveness Central Queensland will be required to adopt a more strategic and integrated focus not only at a sub-regional level but more importantly as a 'region' (Central Queensland including Central Western Queensland) as a whole. Complimentary to this regional focus is the composite of tourism goods and services themselves and the extent at which they coordinate their efforts and how those efforts make up the 'big picture' regionally.

Holistic and integrated industry development requires the involvement of many other sectors of the economic landscape including the alignment of related stakeholder synergies, suggesting that sub-regional marketing strategies will need to broaden their horizons and share the limelight with a broader regional planning focus, the secondary inter-related business landscape and regional management to ensure that coordination efforts are maximised and regionally sustainable.

03 : Proposed RDAFCW Tourism Industry Engagement Framework Model

This document will outline RDAFCWs preferred model of industry engagement that takes into consideration:-

» The current operational capacity of Regional Development Australia Fitzroy and Central West Inc

» Contractual arrangements

» Interrelated networks

» Existing nominated frameworks

» Logistics

» Economic and efficiency criterion

» Legitimacy

The intention of RDAFCW in relation to establishing a Tourism Industry Regional Engagement Framework is not to reinvent the wheel, but with careful consideration being given to all similarly existing frameworks.

RDAFCW have directed the relevant Terms of Reference[6] which includes stakeholder consultation to identify similar frameworks and collate feed-back of preferred models. Dialogue in this regard revealed that no formal industry model sharing similar objectives and encompassing the nominated geographical scope (Central Queensland) exist.

Feed-back on the proposed operational model (oral presentation)[7] was positive however as stated previously, well justified caution dominated any perceived agreement in principal with all participating stakeholders agreeing to progress development collaboratively as an act of good faith.

RDAFCW recognise that tourism can be viewed as the integration of critical linkages - economic development, creation of jobs, skills development, business investment, environmental solutions and social inclusion whereby notably recognising that the realisation of macro horizons is very much dependent upon the overall sustainability of the micro-fabric of the social landscape.

5 Tourism Australia 2010 – National Long-term Strategy

6 RDAFCW Scoping Study Tender 2010 CQ Regional Tourism Engagement Framework

7 RDAFCW Scoping Study Consultation (see: Annexure Stakeholder Consultation Schedule)

04 : RDAFCW Capacity

RDAFCW is a partnership between the Australian, Queensland and Local Governments[8] to develop and strengthen the regional communities in Central Queensland. It has a pivotal role in ensuring the long-term sustainability of Central Queensland. RDAFCW is a not-for-profit organisation predominantly made up of volunteers, who as recognised champions within the community will work with stakeholders to strengthen and build their individual communities.

RDAFCW employs an Executive Officer who manages the organisations daily core-business activities. The key focus of the organisation[9] is on the economic, social and environmental issues affecting regional communities with the Executive Officer managing the Committees involvement in:-

» Consulting and engaging with community on issues, solutions and priorities

» Promoting 'whole of government' activities

» Supporting informed regional planning

» Providing communities with information about relevant government programs and initiatives

» Act as contributors to business growth plans and investment strategies, environmental solutions and social inclusion strategies

As noted above, RDAFCW is predominantly made up of volunteers and at this point in time the Executive Officer is the only singular physical resource available to enable the satisfactory delivery of services dictated under the funding agreement between RDAFCW and the Australian Government.

RDAFCW in a conjunctional agreement with the Queensland Government (MoU) Department of Employment, Economic Development and Innovation (DEEDI) work in a co-location capacity with internal support mechanisms aimed at alleviating administrative bottlenecks.

The administrative and accommodation support provided by the Queensland Government is a significant contribution however given program differentiation actual project support is maintained on a needs basis thus highlighting the need for RDAFCW to 'piggy-back' on aligned networks where possible.

RDAFCW in this regard will endeavour where possible to align itself with relevant industry stakeholder networks to enable realisation of the industry engagement framework.

05 : Contractual Arrangements

RDAFCW executes organisational core-business activities in accordance with the Operational Funding Contract between RDAFCW and the Australian Government department responsible for the RDA Network.

RDAFCW will seek approval from the department for all phases of the development process including rationale and methodology work plans.

The Department will be kept informed for the duration of the development process with invitation to participate as a key stakeholder. The Department will be advised of any agreements, formal/and or informal such as that intended – Memorandum of Understanding (MoU).

8 Contract between RDAFCW and Department of Regional Australia

9 RDA Network Charter 2010

06 : Interrelated Networks

RDAFCW have identified the key stakeholders in the region who will play key function within the tourism industry engagement framework. They include:

- Central Queensland Local Government Authority (Representing Rockhampton, Gladstone, Central Highlands and Banana Regional Councils and Woorabinda Aboriginal Shire Council)
- Central Western Queensland Local Government Authority (Representing Barcaldine, Longreach and Blackall-Tambo Regional Councils and Winton, Barcoo and Diamantina Shire Councils)
- Department of Employment, Economic Development and Innovation
- Capricorn Enterprise
- Gladstone Area Promotion and Development Limited
- Remote Area Planning and Development Board
- Outback Tourism Association – Central Western Queensland

The question will arise as to determinants used in the selection of participating stakeholders and that would be deemed a valid inquiry which will be concluded with a commencement line statement – The RDAFCW Central Queensland Regional Tourism Industry Engagement Framework is a fluid framework with no limitations to the extent of stakeholder networks. This suggests that broad participation is encouraged through the prescribed engagement framework (via established and recognised industry practitioner organisations).

Acknowledging RDAFCW resource capacity, external participatory inquiry will be referred to aligned representative organisations who, will diligently incorporate based on internal assurance processes.

Given the geographical scope of the region (approximately 32% of Queensland)[10] the active function of the industry engagement framework will be 'Virtual' with all modes of communication remaining electronic until such time as increased resources define a variance.

The 'Virtual' industry framework model gives due consideration to ICT[11] variations across the region (Telecommunication deficits) thereby validating the prescribed referral of inquiry to nominated and recognised industry representative organisations.

10 RDAFCW Geographical Scope/RDAFCW Regional Roadmap 2010

11 Information and Communications Technology (ICT)

07 : Existing Nominated Frameworks

RDAFCW recognise and acknowledge the established representative practitioner networks and lead agencies who are currently responsible for ensuring that the tourism industry in Central Queensland is a competitive and sustainable industry.

RDAFCW in the first instance is inclined to nominate that the Local Government representation of Central Queensland Local Government Association and Central West Local Government Association, with integral planning links to the broader and secondary business community, to act as the principal interface between RDAFCW and the Tourism Industry Engagement Framework.

This choice of structure modelling will be non-bias and subject to and conditional upon an agreement between parties. Rationale for selection of choice in this regard is linked to the existing relationship that exists between RDAFCW, Local Government representative bodies, representative Tourism organisations and more importantly the broader business community.

Economic and efficiency considerations would conclude that demonstrated links between subsequent organisations would best place the Local Government Associations as the interface link of the intended engagement framework model.

Simplified modus operandi would include Local Government Association Bodies acting as virtual dissemination point for relevant incoming and outgoing communication flows that would be in the best interest of the Councils and representative organisations they represent.

Negotiations in relation to an effective and efficient modus operandi to be continued upon ratification of the proposed industry framework model

08 : Logistics

RDAFCW intentions are to create a simple yet effective and efficient model of operation that has minimal impost on participating stakeholders.

Logistically RDAFCW will be acknowledging existing stakeholder formats and designing a generic format with a minimal participatory impost. RDAFCW recognise that resources are scarce and all relevant incoming and outgoing contributions will be accepted by the stakeholders existing format with transferrable capability.

09 : Economic and Efficiency

RDAFCW will align with existing frameworks in order to maintain efficient and cost effective practice.

RDAFCW is conscious that additional layers of process has the potential to duplicate what can be described as an already complex series of processes and as a direct result create an impost that enhances participation reluctance.

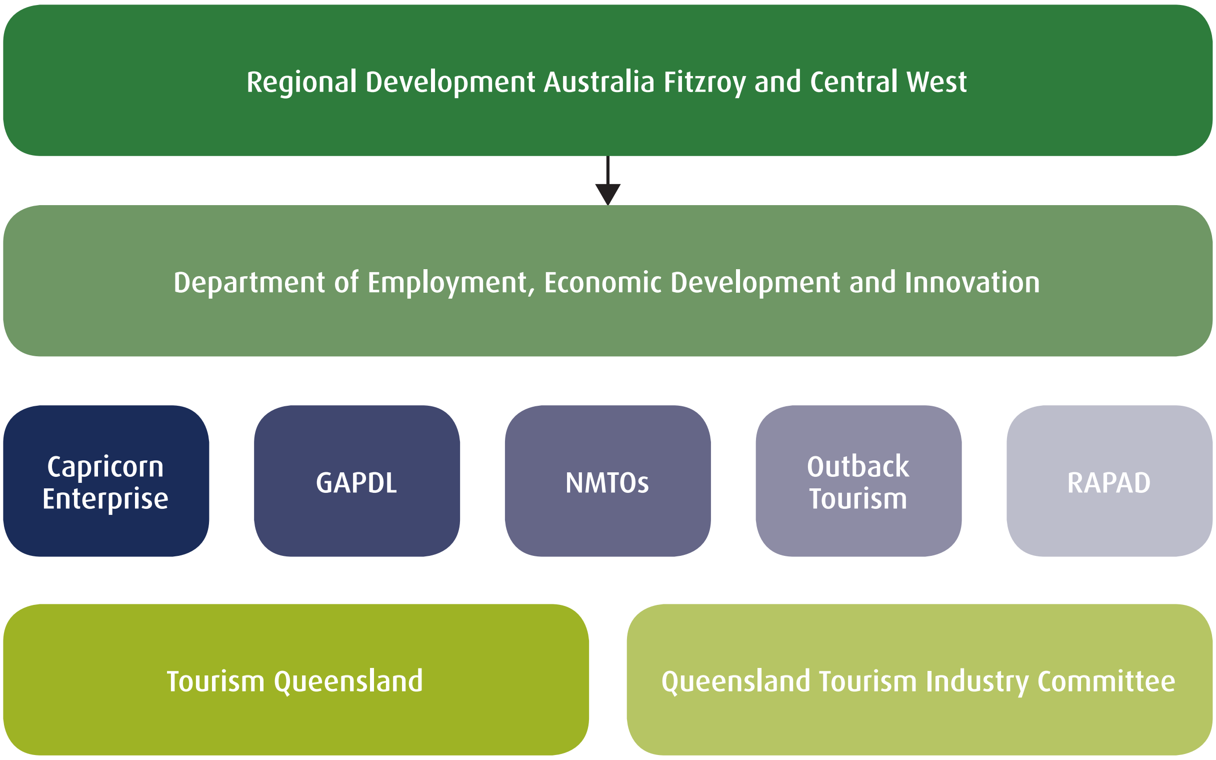
Therefore RDAFCW will establish a framework giving due consideration to 'all' existing frameworks and associated processes that reflect validity, effectiveness and efficiency.

10 : Legitimacy

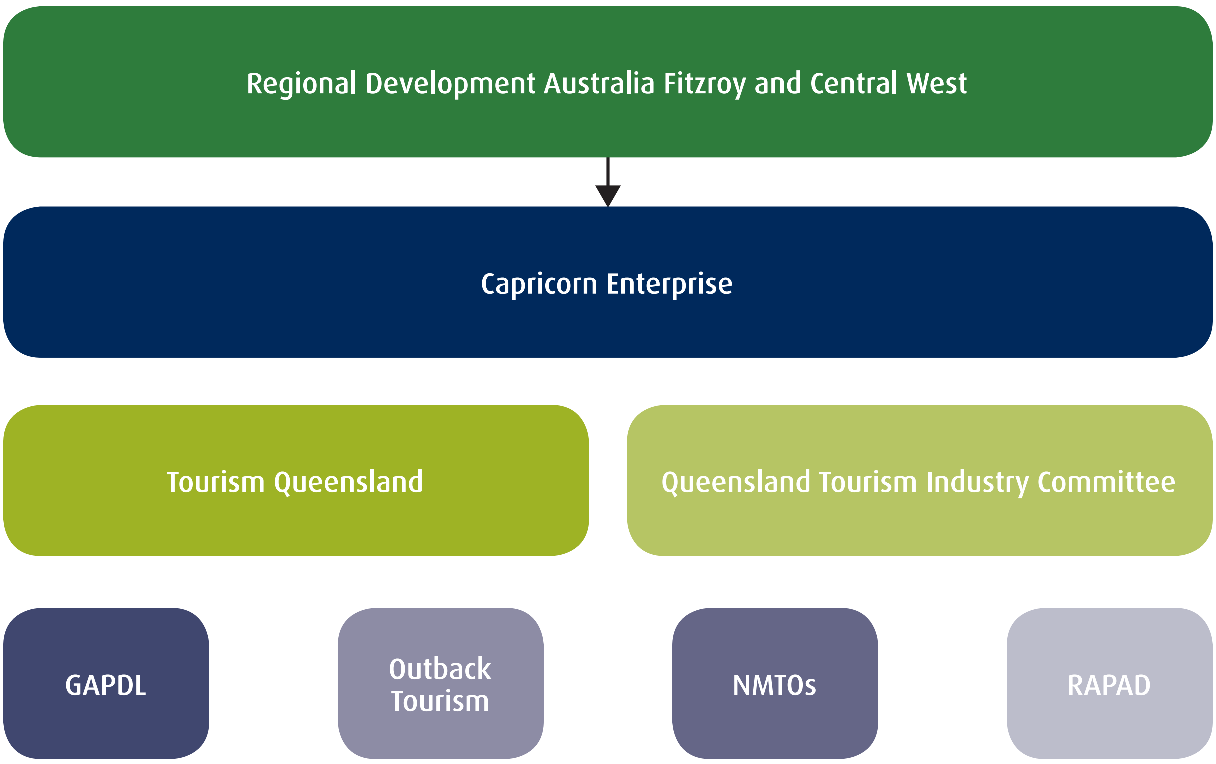
RDAFCW will implement ethical principles fundamental to good public administration with due consideration to the respect for the law and system of government, respect for people, integrity, diligence and probity.

11 : Proposed Tourism Industry Engagement Framework Options – Central Queensland

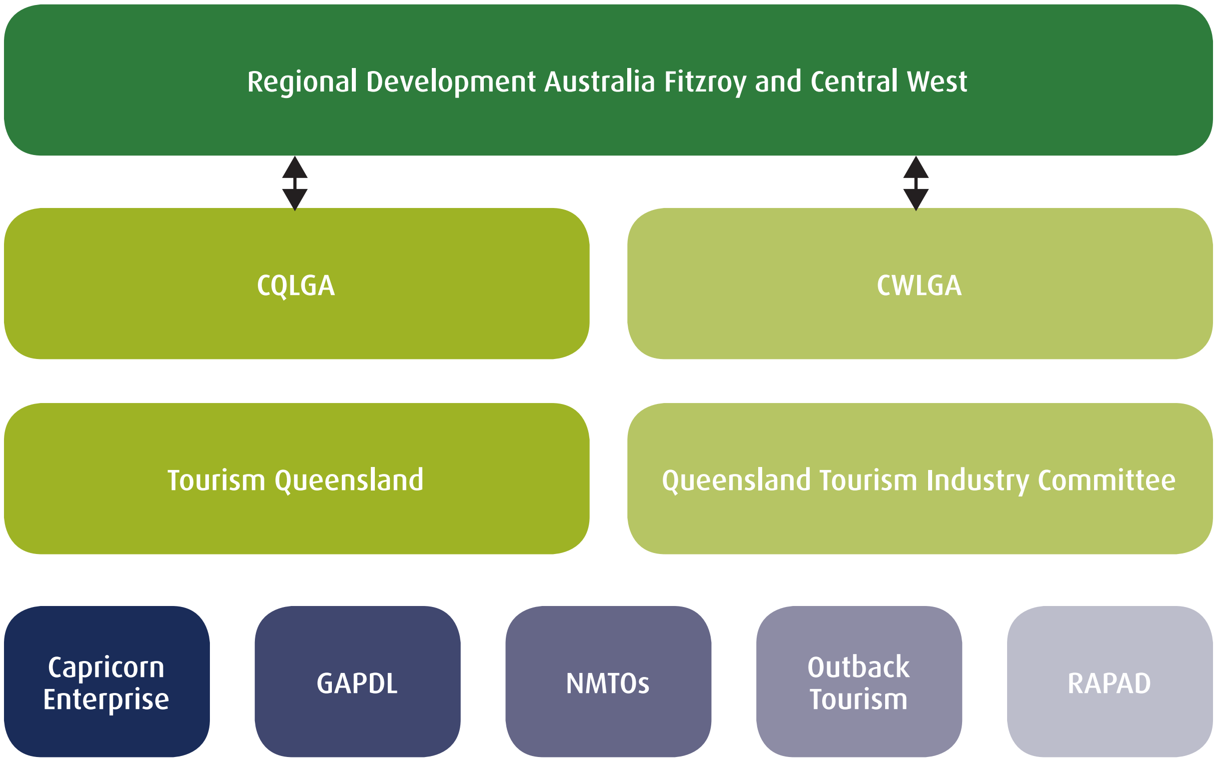
Option 1 Highly Centralised Model



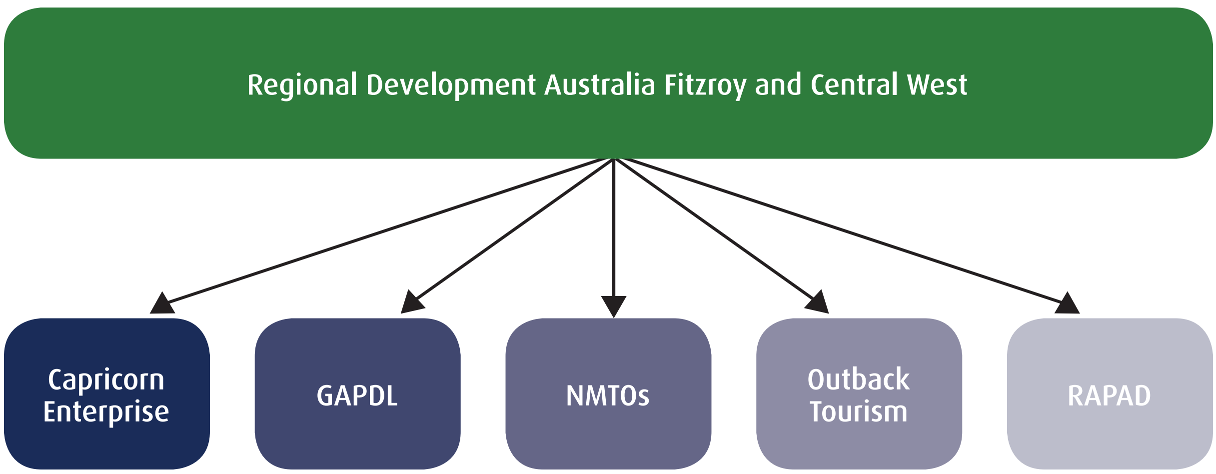
Option 2 Centralised Collaborative Model



Option 3 Decentralised Collaborative Model



Option 4 Highly Decentralised Mode



GAPDL	Gladstone Area Promotion and Development Ltd
NMTOs	Non Member Tourism Organisation
RAPAD	Remote Area Planning and Development
CQLGA	Central Queensland Local Government Association
CWLGA	Central West Local Government Association

12 : RDAFCW Governance Model – Proposed Structure

Executive Officer

Responsible for establishment of integrated engagement framework and due process

RDAFCW Chairman

Ratify preferred operational model with responsibilities defined as:

» Setting direction and vision
» Governance definitions
» Policy Resolution
» Regional Reporting to Department

RDAFCW Committee

Responsibilities defined as:

» Monitoring effectiveness against the organisation's mandate and strategic direction
» Work internally to monitor validity, currency and inclusivity of all associated knowledge transfer elements
» Work internally to identify regional priorities

13 : RDAFCW – Regional Tourism Industry Engagement Framework

A tourism industry engagement framework will be established for the Central Queensland region. The so-named framework will have responsibility for:

» Bottom-up regional reporting of all industry associated activities, products, services and issues
» Top-down dissemination of governmental policy direction, programs and initiatives
» Management and maintenance of knowledge transfer, validity and storage
» Maintenance of electronic communication mediums
» Monitoring and adjusting stakeholder participation

The so-named framework will not result in the creation of a model currently operating in the region. The framework identity will be determined by participating stakeholders with a regional focus.

14 : Framework Linkages

RDAFCW will determine/endorse operational direction.

- Administrative process will be owned by RDAFCW with proposed deliverables outsourced to recognised industry development practitioners (as noted)
- RDAFCW to maintain stakeholder relationship management function
- MoU Stakeholder Agreements between RDAFCW and participating stakeholders

Guiding Principles – Governance Option

Decisions with regard to framework rationale and process will be based on a balance between:

- Improving the quality of knowledge transfer
- Enhancing policy development
- Encouraging regional focus
- The framework will function electronically (virtual) with minimal impost on existing process
- Knowledge transfer and storage will be conscious of self-serving bias and pattern obsessive cultures
- Final implementation will be dependent on a number of factors including forecast effectiveness, willingness to participate and departmental endorsement.

Scoping Study Recommendation

It is recommended that RDAFCW endorse/ratify the proposed Decentralised Collaborative Model of engagement for progression to continued dialogue with potential and nominated industry stakeholders.

15 : Tourism Reporting Process

Consultation

Tourism businesses

- Sample from across region
- Variety of business types
- Members & non-members of RTOs

Key stakeholders

- RTOs: RAPAD; CE; GAPDL
- Tourism Queensland
- QTIC
- Tourism Unit - DEEDI
- Major project proponents

Ascertain

- Current situation of market
- Views, ideas and concerns
- Networking structure
- Current programs
- Opportunities perceived
- Collaborative work

Research

- Grants available
- Scan of media for major stories and opportunities
- SWOT
- Update on potential major projects
- Tourism Opportunity Plan

Identify

- Data and information gaps
- Tourism strategies of major stakeholders
- Employment opportunities
- Infrastructure and product needs
- Key planning, development and marketing issues
- Networking structure between stakeholders and clients
- Activity relevant to Tourism Opportunity Plan
- Reports produced

RTO Registered Tourism Organisation
RAPAD Remote Area Planning and Development
CE Capricorn Enterprise
GAPDL Gladstone Area Promotion and Development Limited
QTIC Queensland Tourism Industry Council

16 : Model Options

Discussion of Options

The following outlines the principle advantages and disadvantages of each of the noted options.

Note that this comparison has ignored issues/risks deemed to be manageable by RDAFCW as part of the implement process.

Option 1: Highly Centralised Model

Where all knowledge transfer (input/output) is aggregated by a single entity.

Advantages	Disadvantages
» Potential to reduce costs through rationalisation of support infrastructure (DEEDI) » Potential to leverage efficiency through a single accountable structure » Simplicity in transparency » Effective communication option » Operate with a single cultural identity » Sound responsiveness » Credible reporting format	» Who is the accountable for input/output » Engagement position based on position within an existin g structure » Financial performance risks associated with single point solution model – if model proves deficient it could prove difficult and costly to regress » Can centralised delivery ensure enhanced participation » A representative management structure (State Government) may find it extremely difficult to maintain a 'whole of government' focus across multiple departmental portfolios » Knowledge transfer (inward/outward) has potential to inherit self-serving bias and pattern obsessive framing » Minimal change implication

Option 2: Centralised Collaborative Model

Where all knowledge transfer (input/output) is aggregated by a nominated industry entity.

Advantages	Disadvantages
» Enhanced participation – keep framework in-house » Efficient and more timely reporting » Reduced costs	» Operational performance risks – too costly to regress » Maintain status – quo for the sake of continuity » Greater level of complexity in reporting as a result of having verification » Potentially more difficult to monitor at detailed level over time » Increased complexity in developing consistent performance standards

Option 3: Decentralised Collaborative Model

Where knowledge transfer (input/output) is aggregated by an independent yet related entity.

Advantages	Disadvantages
» Valid and un-sanitised knowledge transfer » Increased rigor » Enhanced input into regional planning and policy development » Efficient and effective practice » Improved stakeholder confidence » Improved local government connectivity	» Cautious participation » Increased costs » Additional layer of process » Less timely than options 1, 2 and 4 » Complex maintenance schedule

Option 4: Highly Decentralised Model

Where knowledge transfer (input/output) is aggregated by an unrelated entity.

Advantages	Disadvantages
» Nil	» Collective intelligence diluted

17 : Methodology

The nominated engagement framework of Option 3 highlights the importance of process that delivers credible bottom-up industry input and the vital role it will play in relevant future policy development. The study recommends a facilitation process for the establishment of an engagement framework and associated practices based on a 'whole of region' integrated model that demonstrates processes that carefully consider pattern obsessive and self-serving bias as impediments to sustainable growth.

As noted within the 'Partnerships and Pathways to success in Tourism'[12] (Our Outback/Desert Knowledge Australia/Aus Industry/Sustainable Tourism Services 2005) cross-border tourism/business synergies, promotes a situation where operators/business community can work together with the artificial constraints of recognised borders. Such adopted philosophies don't necessarily 'throw the baby out with the bathwater' however consider carefully that which to date, history has denied.

18 : Key Findings

Regional Development Australia Fitzroy and Central West Inc via the informal desk-top audits of current literature[13] and documentation and dialogue between identified key stakeholders has revealed a fresh and motivated outlook that includes collaboration and integrated conceptual thinking.

Sadly and as an impediment to moving more progressively more quickly, observation suggests that parochialism still reigns. However, given the cultural dimension and history of regional and rural existence, one understands the difficulty and reluctance to accept change at face value. On a positive note, key stakeholders recognise their reluctance and unlike resistance, the stakeholders who demonstrate reluctance are cautiously embracing the changes that are most obvious. Collaboration and alignments that have the potential to de-rail individual prioritisation are on the other hand moderately more challenging.

RDAFCW as an independent broker recognise their strength as a facilitator of change whereby treading carefully in building relationships and trust in an effort to promote 'prudent cooperation' opposed to more traditional and parochial aggressive acquisition traits.

RDAFCW findings suggest that a credible representative engagement framework such as that outlined in Option 3 provides bottom-up feed-back will be efficient and invaluable in future policy making, regional planning, marketing, regional investment, employment and training and most importantly create an educational process that will address the cultural changes required.

The recommended geographical scope of the intended engagement framework includes the Fitzroy and Central Western Queensland regions with the key stakeholder alignments of:

- Central Queensland Local Government Authority (Representing Rockhampton, Gladstone, Central Highlands and Banana Regional Councils and Woorabinda Aboriginal Shire Council)
- Central Western Queensland Local Government Authority (Representing Barcaldine, Longreach and Blackall-Tambo Regional Councils and Winton, Barcoo and Diamantina Shire Councils)
- Department of Employment, Economic Development and Innovation
- Capricorn Enterprise
- Gladstone Area Promotion and Development Limited
- Remote Area Planning and Development Board
- Outback Tourism – Central Western Queensland

12 Our Outback – Sustainable Tourism Services Nov 2005

13 Tourism Qld Tourism Opportunity Plan 2009-2019; Tourism Australia National Long-term Strategy 2010
Capricorn Enterprise Strategic Plan 2010-2013; GAPDL Strategic Corporate Plan 2010-2013;Tourism Qld Action Plan 2012

19 : Engagement Framework Benefits

The proposed engagement framework and aligned bottom-up reporting process will provide RDAFCW with a credible and efficient local knowledge transfer mechanism whilst at the same time enhancing RDAFCWs communication and dialogue capacity across a wide cross section of industry sectors.

RDAFCW in its role as conduit between the three tiers of government and the community recognise the proposed framework as critical and an effective and efficient means of gathering and disseminating valuable information (knowledge transfer) to relevant stakeholders. Whether that flow of information is 'bottom-up' or 'top-down' it has the potential to influence accordingly.

Scoping Study dialogue between RDAFCW and potential participating key stakeholders revealed an eagerness to work closely in developing the proposed engagement framework with easily identifiable benefits for all participating alignments. Such benefits include:

» Establish an effective and efficient structured knowledge transfer network

» Demonstrate cross-border synergies and tangible alliances

» Cooperative resource and information sharing

» Collaborative monitoring and reporting frameworks

» Enhanced industry cluster opportunities

» Enhanced communication between 3 tiers of Government and industry sectors

» Increased government program participation

» Enhanced advocacy platform

20 : Framework benefit elaboration

Establish an effective and efficient structured intelligence network

The proposed Central Queensland Tourism Industry Engagement Framework will not duplicate existing frameworks but rather enhance overall effectiveness and efficiency of such networks through cross-border collaboration and cooperation. The proposed framework will utilise, expand and formalise existing models to achieve a recognised and credible benchmark of operation.

It is envisaged that all participating stakeholders will contribute during the development phase, endearing ownership and in turn, long-term sustainability. The formalisation of the intended framework will occur upon completion of the engagement framework model and will consist of a Memorandum of Agreement between participating stakeholder groups. The initial stakeholder alignment will not serve as gate-keeping boundaries but instead initiate expansion based on ability to contribute opposed to alignments based on positions/ boundaries of existing frameworks.

So as not to duplicate and set the stage for yet another 'talk fest committee' the proposed engagement framework will operate effectively and efficiently in a virtual capacity taking full advantage of transferrable reporting formats and existing technological advancements.

RDAFCW will formally develop and ratify the proposed framework and objectives and reporting formats to a level of practice consistent with Departmental and Ministerial reporting. Development in this regard will give due consideration to participating stakeholders existing operational and reporting models and develop a generic format that will compliment and minimise additional imposts on stakeholder participation.

It is envisaged that framework details will be monitored annually to give rise to operational adjustments such as Corporate intentions and Committee fluctuations. Again such adjustments will be executed with the minimum of fuss so as not to further impose on stakeholder core-business operations.

RDAFCW from a top-down perspective, will endeavour to negotiate similar practices with the three levels of Government to ensure that information flows throughout the regional landscape are current, credible and provided in a manner that is in the best interest of all concerned.

RDAFCW will collate receipted knowledge transfer material and provide in verbatim documentation to all participating stakeholders.

RDAFCW advises participating stakeholders that the level of assurance gathered as a direct result of the formalisation of the intended framework will be transferrable not only to the RDAFCW Committee but more importantly be transferred to policy decision makers responsible for adjusting and developing policy that impacts on the sustainability of industry in the Central Queensland region.

Demonstrate regional cross-border synergies and tangible alliances

Surface-skimming research undertaken by RDAFCW during the scoping study phase shows that factors such as a history of low rates of return, a lack of basic market data, inherent cyclical and/or seasonal nature of tourism, complexities dealing with multi-level government processes, lack of coherent vision and direction by government, all leads to less than optimal development within this industry sector.

RDAFCW suggests that for predicted growth to be achieved 'all stakeholders' must work in unison with the clarity of vision and sound leadership. Thereby acknowledging that cross-border synergies and tangible alliances will lead to:

- **Regional** cooperation and integration of management plans
- **Regional** civil and social infrastructure strategic planning
- **Regional** economic growth
- **Regional** input into investor obstacles (i.e.: Australian Tax Code)
- **Regional** workforce and training enhancement
- **Regional** Investment attraction
- **Regional** Taxation averaging
- **Regional** Road development
- **Regional** enhancement of natural resources and national parks
- **Regional** Industry data development.

Cooperative resource and information sharing

Networks, knowledge, and relationships have become crucial assets to business survival. Industry trends indicate (Tourism Australia Corporate Plan 2010) that network building is a major new source of competitive advantage and an essential regional and indeed global management requirement. Because regional policies encourage inter-firm alliances and the development of regional economic communities, the fostering of a culture of connectivity, networking, learning, sharing and trust may offer a potential solution to the possible loss of competitive advantage.

RDAFCW suggests that resource sharing and increased information flow will strategically contribute to necessary levels of leverage aimed at alleviating any potential loss of competitive advantage.

Network formations may vary from existing cluster consortia to loosely coupled business systems, online networks, or emerging grass-roots economic community developments. No matter what the format, generally their aim, and the aim of regional policies, is to develop a more effective and prosperous business sector through inter-firm cooperation, knowledge, and resource sharing (Chisholm, 1998; Diez, 2001). In the context of emerging technologies related knowledge–economy business models of linking stakeholders in dynamic clusters (OECD, 1999), connectivity is revitalizing conventional reasons for clustering (e.g., creating critical mass), as it can help facilitate the knowledge-based infrastructure network imperative for today's competitive advantage (Porter, 1998).

Collaborative monitoring and reporting frameworks

Collaborative monitoring and recording/reporting frameworks are powerful tools in establishing unison and cohesion. They are also mechanisms to validate knowledge needed and knowledge generated both of which are valuable assets that, if used to adjust practices to achieve best practice results can be deemed the region's Intellectual Capital (IC) which at the end of the day will contribute to and assist in maintaining the region's overall competitiveness.

The proposed engagement framework thereby being best described as structural capital utilising the noted IC as the determinants in adjusting process, structure and outputs.

Enhanced industry cluster opportunities

Over the last decade there has been considerable interest and activity in clustering and the concomitant link to regional development. In the world economy small to medium enterprises (SMEs) are recognised as playing a pivotal role in regional economic sustainability and growth.

In today's global economy, knowledge is considered a precious commodity and concepts like knowledge and resource sharing have become increasingly prevalent in business practices. In this new environment, the nexus of sustainable regional development rests upon the ability of stakeholders to harness knowledge collaboratively and continuously whilst pursuing collaborative alliances and partnerships wherever feasible.

The intended framework has the capacity to identify opportunities and support potential clusters/synergies whether they be a loose, geographically bound concentration of like-minded stakeholders or specific talents, which together are able to achieve synergy based on mutual interdependencies.

Enhanced communication between three tiers of Government and industry sectors

RDAFCW as noted previously is recognised as the conduit between the three tiers of government and the Central Queensland community. The intended framework will provide aggregated bottom-up reporting to the three tiers of government that will be deemed regional, local, current and credible and with an ability to transfer the highest level of assurance to all recipients of such information.

Increased government program participation

The proposed framework recognises that specific Industry Councils and representative bodies play an enormous role in providing information (bottom-up/top-down) in an effort to deliver what is needed to sustain the industry into the future. RDAFCW is not trying to duplicate such mandates but instead augment those current efforts laterally, across which include more recent regional development and social planning agendas.

> It is a natural thing for the brain to seek symmetry. There is the notion of, if you find the ultimate structure (accepted structure) everything springs from it .... what will spring from it is that which the sought after symmetry seeks.
>
> *Edward De Bono // Comfort of Paradox 2001*

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(Prepared for Desert Knowledge Australia)

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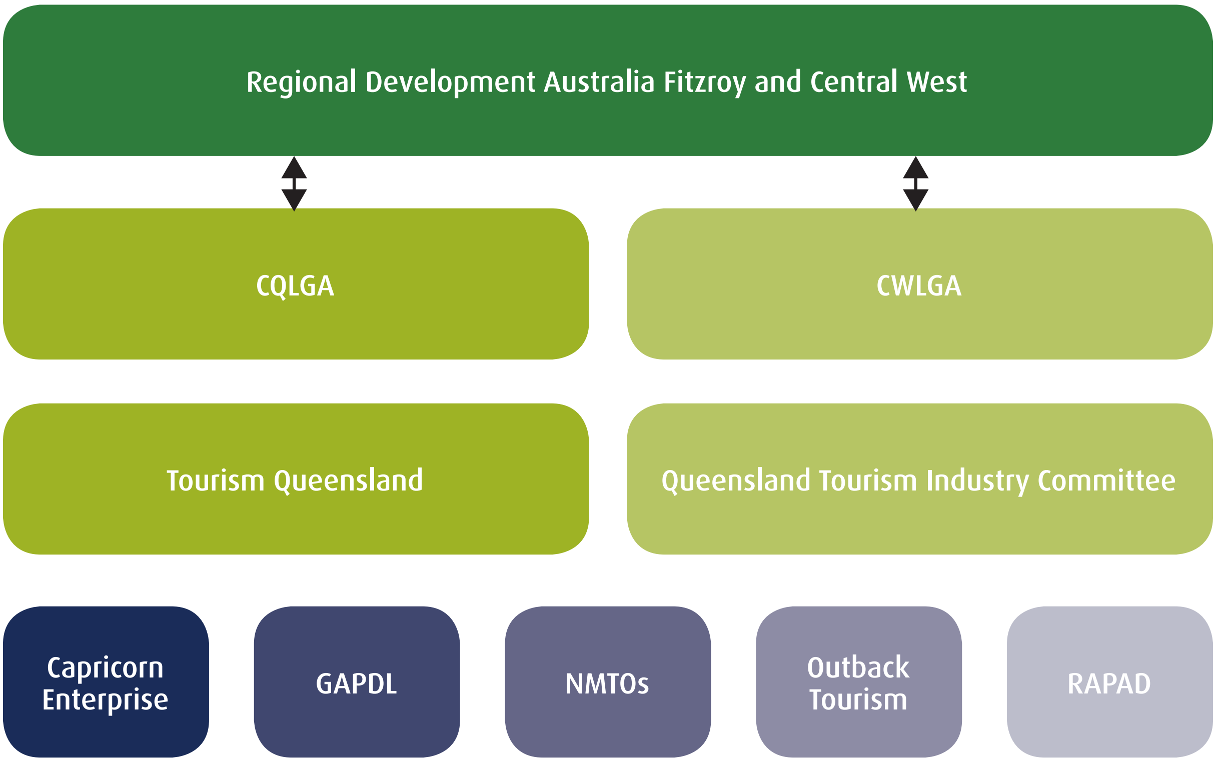
(Prepared for Desert Knowledge Australia)

21 : Decentralised Collaborative Model Rationalisation

RDAFCW recognises Local Government as playing an integral role in further validating knowledge transfers that stem from existing industry focused communication channels. Such a statement does not lessen the input value of existing knowledge transfer mechanisms but rather, considers expanding collaborative intelligence sources to further enhance the assurance levels necessary to reflect non-bias reporting formats.

Local Government, in this case the representative bodies of CQLGA and CWLGA are linked to individual Regional and Shire Councils who intrinsically observe, facilitate and support tourism industry and business landscapes alike. Local Government will bring a local versions to the table which when aggregated will do either one of two things – (1) demonstrate strategic commonalities and a sound regulatory reporting framework and/or (2) expose strategic disparities. Either of which will enhance the credibility and ownership of knowledge transfer utilised in future industry policy development.

Option 3 Decentralised Collaborative Model



GAPDL	Gladstone Area Promotion and Development Ltd
NMTOs	Non Member Tourism Organisation
RAPAD	Remote Area Planning and Development
CQLGA	Central Queensland Local Government Association
CWLGA	Central West Local Government Association

22 : Regional Tourism Industry Engagement Framework Resource Register

Organisation	Primary Contact	Secondary Contact	Details

23 : National Tourism Perspective

Minister's Foreword

The tourism industry makes a significant contribution to the Australian economy; employing one in 12 Australians across a broad range of sectors from hospitality and transportation to training and accommodation. The Australian Government has recognised the sector's importance by elevating the tourism portfolio to the Cabinet table to ensure it receives the recognition it deserves.

Australia as a destination has much to offer, drawing visitors from afar as well as within our shores. This is why it is important to continue to offer compelling tourism attractions for traditional markets internationally and domestically, as well as for new and emerging markets such as China and India.

The success of Australia's tourism industry depends upon action on both the supply and demand sides of the equation. It is pointless to create new demand if Australia's tourism industry does not have the productive capacity to meet it. Supply-side issues must be given a heightened importance in shaping the future of tourism to ensure Australia's competitiveness.

Elevating tourism to the national status it deserves as one of the key drivers of this economy will require a true public-private partnership. All levels of government and industry will need to work together to reposition the industry on a dynamic growth path for the future, and be accountable for their own areas of responsibility – policy framework for government, and tourism product for industry.

I believe that tourism in Australia will grow from strength to strength creating wealth and jobs for Australians. It will continue to provide visitors with unique and unforgettable experiences. This will require a small, but significant shift in the way the industry manages its own future.

This Strategy outlines the policy framework governments will deliver to help the industry realise this vision. Together with my state and territory ministerial colleagues we will drive the Strategy through the Tourism Ministers' Council. Reshaping the framework will assist the tourism industry to realise its full potential on a dynamic path for growth, delivering a revitalised and resilient industry that can achieve its full economic potential.

Martin Ferguson AM MP
Minister for Tourism

National Long-Term Tourism Strategy

Tourism is a significant and vital industry to Australia. In 2007-08 it contributed over $40 billion to Australia's Gross Domestic Product (GDP), and directly employed around half a million people. With export earnings exceeding $23 billion, tourism is Australia's largest services export.

Given Australia's geographic location, this is a great achievement for an industry operating in an intensely competitive and sometimes volatile market.

Australia is regarded as a highly aspirational destination for international travellers. Both the wealth of natural assets and the richness of our heritage and cultural offering, particularly our Indigenous culture, represent a significant part of our appeal. However, given the competitive environment in which we operate, we must continually strive to convert aspiration into visitation.

Similarly, domestic tourism accounts for around 75 per cent of the industry and is fiercely competitive, with domestic operators competing not only against overseas travel options but also against a range of other consumer activities and products.

24 : National Positioning for long-term growth

Stimulating consumer demand and securing jobs Australia's share of global tourism has been in decline for more than a decade. In its final report (the Jackson Report), the National Long-Term Tourism Strategy Steering Committee identified a 14 per cent reduction in Australia's global share of tourism expenditure between 1995 and 2008. However, during the 2008–09 global financial crisis the Australian tourism exports grew by 6 per cent, contrary to international trends.

Domestically, the tourism industry benefited from the Commonwealth Government's economic stimulus package developed in response to the global financial crisis. For example, Restaurant and Catering Australia credits the government's economic stimulus package with increased sector expenditure of at least $80 million. The one-off bonus payments in December 2008 and April 2009 gave Australia's tourism operators the opportunity to compete with retail and other sectors and priorities for a share of the $12 billion plus injected into the economy. The stimulus also delivered more than $500 million to small business initiatives offering benefits to 93 per cent of tourism businesses.

For tourism to compete with discretionary spending alternatives, marketing must remain a key sector priority. Tourism Australia is working with industry partners to maintain Australia's presence in international markets while enhancing its strategic domestic marketing role. Tourism Australia and state and territory tourism organisations will spend nearly half a billion dollars this year selling Australia to the world through a combination of brand, consumer and tactical marketing initiatives.

Tourism Australia, led by an invigorated, skilled, industry-based Board, will focus on priority markets. The campaigns will include engagement with state and territory tourism organisations and the private sector in order to increase visitation and expenditure and to further secure jobs in the sector.

Domestic and international marketing will be the focus of the targeted campaigns, especially in the significant Australian markets of China, New Zealand, the United Kingdom, the United States and India. Australian marketing efforts will seek to increase tourism trade from future growth markets, such as those in the Asian region. Tourism Australia developed the No Leave No Life campaign to promote domestic tourism and keep local holidays in the forefront of consumers' minds. Through Tourism Australia and 94 partner organisations, including state and territory governments, almost $4 million has been invested to encourage Australians to use their 123 million days of accrued leave (worth around $33 billion to Australian businesses) for an Australian holiday. The campaign was launched in March 2009 and around one-quarter of the workforce has seen it.

In addition, Commonwealth, state and territory governments and cities will spend $62 million bidding for corporate business this year. Tourism Australia, in cooperation with the states and territories, will build on Dreamtime 09 a premier event promoting business travel. Tourism Australia's biennial Dreamtime event will be expanded to include business events marketing in collaboration with the states and territories and the private sector, to capitalise on this lucrative $6 billion market.

The Tourism Australia Board is working closely with industry stakeholders and state and territory governments to expand Tourism Australia's stand-alone status, capacity and functions by incorporating industry development, including supporting online distribution, promoting quality standards, and representing Australia's tourism brand internationally.

Action

Broaden and strengthen Tourism Australia's capacity and functions to incorporate industry development and online distribution, while retaining its primary focus on international marketing and enhancing its strategic domestic marketing role.

25 : Leadership

Strategic and coordinated leadership that will drive the national tourism agenda Tourism is a highly diverse business-to-consumer industry, ranging from large multinational firms through to individual owner-operators. Strong leadership is needed in order to achieve substantive policy outcomes across jurisdictions and portfolios. This Strategy establishes an effective governance structure for tourism that addresses both demand-side and supply-side issues.

At the federal level, Tourism Australia works with state and territory governments and the private sector to market Australia to the world. The Commonwealth Government Department of Resources, Energy and Tourism (RET) delivers government tourism policy. At the inter-jurisdictional level, the Tourism Ministers' Council (TMC) is the principal forum for discussing tourism policy matters of mutual interest to the Commonwealth, the states and territories, and New Zealand. The Australian Standing Committee on Tourism supports the TMC. The National Tourism and Aviation Advisory Committee (NTAAC) formalises the relationship between major tourism stakeholders to provide high-level advice to RET, the Department of Infrastructure, Transport, Regional Development and Local Government (DITRDLG) and the TMC.

Historically, these arrangements have not enabled sufficient focus on development of the industry's productive capacity. While the TMC (established in 1959) is one of the longest serving ministerial councils, its average meeting frequency of once each year has made it difficult to play a strategic industry role.

Industry itself has pursued ad hoc engagement with governments on specific issues rather than industry-wide priorities. As there has not been a cohesive structure for on-going industry input and feedback, governments have been vulnerable to criticism over responsiveness. Arrangements have therefore not engendered cohesion and cooperation between state, territory and Commonwealth governments, and with industry.

The TMC leadership model provides a strong leadership and governance structure for tourism. This structure links stakeholders in the industry and provides a balanced focus on building the productive capacity of the industry and destination marketing. It also aligns the Commonwealth Government, the states and territories, and industry on key priorities.

The TMC will engage actively across the full range of issues; this will mean tourism ministers must engage across portfolios to address issues such as planning and regulatory approvals processes, infrastructure development, labour and skills development, environmental management and Indigenous engagement in the tourism industry. The TMC will establish issue-specific working groups with a problem-solving mandate. Importantly, these working groups will include relevant industry operators, governments and Tourism Australia.

The industry has already made progress towards engaging governments with a single and consistent voice that clearly articulates industry-wide priorities and provides evidence as the basis for action. This will be further augmented through actively engaging industry in the new governance arrangements with direct participation in the issues-based working groups supporting the Strategy's implementation.

The Jackson Report identified the need for a federal ministerial taskforce to periodically review tourism issues and opportunities. This will be best addressed by enhancing the role of the NTAAC. The ministers for Tourism and for Infrastructure, Transport, Regional Development and Local Government will co-chair the NTAAC, replacing the existing co-chairing arrangements by officials from RET and DITRDLG. The NTAAC's role will be expanded to include a broader range of tourism stakeholders that will interact with both portfolios and with Tourism Australia in its own right. The NTAAC will meet at least twice each year and address any tourism matters referred by the TMC or other relevant ministerial councils, such as the Australian Transport Council.

The NTAAC meetings will be held before the TMC meetings to ensure industry has an opportunity to provide input to the TMC agenda. The Interdepartmental Committee (IDC) established to support the development of the Strategy will be continued to support the revised NTAAC. The IDC will identify progress and monitor strategy-related impediments that require Commonwealth Government action or leadership, and promote cross-agency working relationships on these key issues.

Action

Reinvigorate the Tourism Ministers' Council to enable stronger participation from State and Territory Governments and industry, and oversee implementation of national tourism priorities.

Maintain whole-of-government links through the Interdepartmental Committee meeting periodically to identify and progress Strategy-related impediments and monitor Strategy implementation.

Broaden and elevate the National Tourism and Aviation Advisory Committee to be co-chaired by the Minister for Tourism and the Minister for Infrastructure, Transport, Regional Development and Local Government:-

- » *reporting to the Tourism Ministers' Council and other relevant ministerial councils*
- » *meeting at least twice each year*
- » *include Tourism Australia and tourism-related transport operators*

26 : Informing Industry and Government

A research and development agenda, that will inform Industry and Government. Robust research needs to underpin the tourism policy, industry development and marketing of Australia.

Research is vital to understand market developments, labour market trends and industry performance, and to anticipate the impacts of climate change, shifting consumer preferences and demography. ET-commissioned independent research by KPMG Econtech showed that gaps in the tourism research agenda primarily relate to industry development and policy analysis. Research that enables industry and key stakeholders to accurately assess opportunities and respond appropriately to challenges is currently not undertaken; improved research is clearly needed. Once research and data are available, they must be provided as broadly as possible in a format that enables stakeholders to make informed decisions.

The Jackson Report identified the need for greater original research, stronger links to the commercial sector, and improved dissemination of data as critical issues in developing the Australian tourism industry.

A research and development advisory board will be established to oversee delivery of a national tourism research agenda. Tourism Research Australia has been reintegrated into RET. Tourism Australia will continue to be the central agency for destination marketing and promotion; however, its role will be expanded to include aspects of industry development, such as facilitating greater online distribution for tourism providers and building Australia's Indigenous tourism capacity.

The advisory board's structure will include industry, state and territory representatives, and other relevant agencies, such as the Australian Bureau of Statistics. Tourism Research Australia's focus will be expanded over time to address other matters, such as investment and product development. Additional resources, including from the private sector and industry partners, will contribute to:-

- » Producing a comprehensive state of the industry report, a quantitative and qualitative assessment of industry performance, challenges and trends, and metrics for measuring the Strategy's implementation;
- » Conducting research into issues affecting tourism, including investment, productivity, labour and skills, and taxation;
- » Using Computable General Equilibrium modelling to better understand links between tourism and the rest of the economy; and
- » Developing an industry communications program to ensure the research is communicated and shared across the industry. A new national governance structure for research and development (comprising industry and government) will drive a national and holistic agenda for tourism research.

Action

Establish a new governance structure for research and development to drive a national tourism research agenda, and advance high quality research that informs industry and policy development.

Produce an annual state of the industry report, providing a quantitative and qualitative assessment of current *industry performance, challenges and trends. The future research agenda will incorporate work on issues affecting tourism including investment, productivity, labour and skills, and taxation.*

Tourism Australia to lead industry communication including, an annual industry outlook conference and disseminate research and development information.

27 : Facilitating Investment and Regulatory Reform

Investment that will ensure Australian tourism product remains competitive in a global marketplace Ensuring that Australia moves up the international tourism value chain and remains competitive requires quality tourism business products and services from tourism operators committed to innovation, continuous improvement and renewal. The Jackson Report suggests that greater investment in the tourism industry will drive long-term profitability, innovation and growth in the sector.

The different levels of government in Australia present regulatory challenges to businesses resulting in complex and lengthy investment and development approval processes, and impediments to reinvestment. Regulatory reform is needed to provide transparency and certainty for investors and business.

The Commonwealth Government plays an important role in encouraging improved product quality and innovation. An Access Economics report commissioned by RET stated the tourism industry is characterised by a significant flow through of additional activity to other parts of the economy and to other businesses. Building a tourism industry profile is important in raising awareness of Australia as a destination for trade, corporate travel, conferences and meetings, education and investment.

Tourism Australia will work with Commonwealth Government agencies, such as Austrade, and with state and territory governments and stakeholders to extend Australia's brand. Building Brand Australia will increase awareness of Australia as not only a place to visit, but also a place to live, work, study and invest. This will include a focus on attracting investment in tourism infrastructure to stimulate economic development and improve the quality of the tourism product.

Action

The Tourism Ministers' Council to appoint an investment and regulatory reform working group, including industry, and state and territory stakeholders, to implement and progress the tourism regulatory reform priorities.

28 : Labour and skills

Labour and skills development that will support tourism industry needs Tourism is a labour intensive, seven-day-a-week industry. It has one of the lowest levels of post-school qualification and is growing at a rate faster than most other sectors of the workforce. Many frontline staff are casual or part-time unskilled employees. The Jackson Report states that tourism requires equitable and adequate access to skills programs that focus on recruitment and retention. The profitability of the industry is important in ensuring tourism has access to the labour and skill resources it needs by improving the competitiveness and thereby the attractiveness of working in the industry. More effective use of existing labour and skills mechanisms and programs by the tourism industry would improve staffing quality, retention and career options.

Government and industry by focussing on tourism and hospitality skills and using the Tourism and Hospitality Workforce Development Strategy, could achieve a more integrated approach to skills development and retention. Urgent consideration needs to be given to how the skills and training needs of the tourism industry can be best recognised and progressed.

This work must focus not only on attracting people to the tourism industry, but also on increasing the opportunities for people to build sustained careers through training and skills development. Tourism skills and qualifications must be recognised and must be portable both within and beyond the industry. For example, the Responsible Service of Alcohol and the Responsible Conduct of Gambling qualifications are not recognised between all jurisdictions. Offering people the opportunity to expand their employment options and use their skills across jurisdictions could be a significant way to attract people and retain their experience.

The Commonwealth Government has supported a number of pilot projects to improve tourism and hospitality workforce recruitment, retention and skills development; however, the leading practices developed through this support need to be rapidly promulgated through the industry nation-wide.

Indigenous people bring a unique skill set and cultural opportunity to the tourism industry, while benefiting from the significant opportunities to participate in the economic activity and wealth creation that tourism can provide. Increasing Indigenous participation in tourism, particularly through employment, would help 'close the gap' of Indigenous disadvantage and help address labour shortages in the tourism sector, particularly in rural and regional Australia.

Action

The Tourism Ministers' Council to work with Service Skills Australia to implement the Tourism and Hospitality Workforce Development Strategy

29 : Responding to challenges

Tourism businesses that will adapt to the impact of change, climate change and other external shocks Tourism will continue to face a range of short- and long-term external shocks and challenges, as evidenced in major climate change reports including the Garnaut Climate Change Review Report and the Intergovernmental Panel on Climate Change Fourth Assessment Report. Climate change is an example of a material threat to Australia's tourism industry.

Tourism Australia's Brand Health Monitor Survey - Attitudes to Climate Change and Environmental Degradation, 30 March 2009 also indicates that consumers in key Australian tourism markets are increasingly focusing on climate change and environmental sustainability when making purchasing decisions. Through enhancing awareness of environmental protection and sustainability, and ensuring proper management of natural assets, Australia has the opportunity to counteract negative consumer perceptions and purchasing behaviours, and to gain significant economic, social and cultural benefits from sustainable tourism.

In the short- to medium-term, government climate change policy reforms will have associated flow through costs that will affect the tourism industry and broader service sectors. Governments can provide a framework to help businesses prepare for a carbon-constrained future and move to a low-pollution economy, but for this to be effective, industry must take advantage of Commonwealth Government programs, such as the Climate Change Action Fund (funded from 2009 to 2015).

Opportunities will arise for businesses and consumers through consumers' increased focus on the environment. Australia's natural environment is a significant part of Australia's appeal as a travel destination. While the tourism industry needs to recognise the implications of climate change and how it will need to respond and adapt, the industry must also be able to demonstrate to the market that it is providing a clean green product and environmentally sustainable experiences.

This is particularly important for a long-haul international destination that has a strong natural product offering but is dependent on carbon-intensive air transport links for international visitation. Many Australian tourism operators have developed clean green tourism products, but the industry must continue to focus on developing and implementing innovative practices that will enhance Australia's status as a green destination.

Through working in cooperation with government, the Australian tourism industry will be prepared to respond to challenges with targeted strategies, as evidenced by the response to the industry's current primary challenge, climate change.

Action

Through the Tourism Ministers' Council, continue to deliver the actions of the Climate Change Taskforce to improve industry understanding of the impact of climate change, and to prepare the Australian tourism industry for a carbon-constrained future.

30 : Excellence in product and service delivery

Product quality and service delivery that will ensure Australia is a high-value destination Consumers are becoming increasingly well informed about travel options and are demanding value for money in their purchasing decisions. Provision of high quality, innovative tourism products and experiences, coupled with delivery of excellent customer service, are essential to Australian tourism's performance against international competitors. A single, nation-wide quality accreditation framework will support this effort.

The Commonwealth Government has worked productively with industry, and state and territory governments to develop the National Tourism Accreditation Framework. The Framework includes the industry-based Tourism Quality Council supported by Tourism Australia and RET. By reporting to the TMC, the Tourism Quality Council will identify opportunities to promote and identify quality tourism businesses.

Action

The Tourism Ministers' Council to endorse and implement the National Tourism Accreditation Framework, and the Tourism Quality Council as the mechanisms to recognise Australia's quality tourism products and services.

31 : Strengthening our competitiveness with industry and product development

Destinations and tourism product, that will make the most of our unique attributes. The Australian tourism industry offers a wide range of tourism and travel options, reflecting the diversity of Australia's natural and heritage assets, and Indigenous culture. The industry's sustainability is based on obtaining the greatest economic value with the least environmental cost. Tourism associated with the Great Barrier Reef, for example, is conducted in accordance with the strictest environmental regulations and in 2006-07 provided a $5.1 billion contribution to the national economy.

The future of tourism will depend on ensuring the industry provides compelling and sustainable experiences to consumers. The value of the natural, cultural and heritage assets is likely to become increasingly important as consumers actively seek sustainable and authentic tourism experiences. The economic value of these assets is significant.

In 2008, 23 million people visited Australia's cultural and heritage locations, comprising 70 per cent of all international visitors and 27 per cent of domestic visitors. Heritage and cultural tourism is a growth market, contributing 37 per cent of world travel and growing by 15 per cent per annum. The continuing development of Indigenous tourism is a key example of the benefits that can be derived from tourism in helping to achieve economic and social outcomes; however, Australia's Indigenous tourism offering needs further development.

While government has in the past supported tourism-specific Indigenous programs, such as the Business Ready Program for Indigenous Tourism, such approaches can focus narrowly on tourism at the expense of the economic potential that tourism can provide. Instead of developing specific Indigenous tourism programs, Indigenous employment and economic development programs should recognise the potential benefits of tourism to enhancing the social and economic status of Indigenous people.

For example, the National Landscapes Program has succeeded in aligning the plans and actions of agencies, governments, communities (including Indigenous), and industry, sometimes crossing jurisdictional boundaries with local communities driving development and adoption of destination development plans.

Actions

Encourage continued advancement of the National Landscapes Program and investigate use of the initiative as a model for further collaboration between government and industry in destination development.

Review capacity of current Indigenous development programs to develop Indigenous tourism products. This will include an annual review of existing Indigenous tourism products and services and publication of the National Indigenous Tourism Product Manual through Australia.com.

32 : Measuring our performance

Performance indicators that will track progress and support strategic priorities The Strategy are not the end point; it is the starting point that establishes the basis for the future of Australia's tourism industry. Periodically, the TMC will review its progress against the Strategy and key industry measurements, setting new strategic priorities over time to drive implementation of the national tourism agenda. Overall market performance indicators will be necessary to track progress and to underpin closer collaboration with the private sector.

Actions

Advance the new Research and Development Advisory Board focused on research to inform policy, marketing, and industry development. Research will be balanced (supply and demand; objective and behavioural) and triple bottom line (economic, social, and environmental).

The Department of Resources, Energy and Tourism and Tourism Australia, working with stakeholders, to publish a comprehensive state of the industry report to be delivered to the Tourism Ministers' Council in 2010 and distributed widely throughout the industry. The Research and Development Advisory Board, led by the Department of Resources, Energy and Tourism's Secretary, to oversee a work program of rigorous industry metrics (to be endorsed by the Tourism Ministers' Council in 2010) and published on Tourism Research Australia's website. Metrics will include tourism volume, value, and satisfaction indicators at the national and regional levels.

33 : Jackson Report (2009) - National Long-Term Tourism Strategy

Tourism plays a vital role in the strength, diversity and resilience of the Australian economy. In 2007-08 tourism contributed more than $40 billion, or 3.6 per cent, to Gross Domestic Product (GDP).

Tourism is Australia's largest services export industry, providing 10.1 per cent or $23.6 billion of Australia's total exports in 2007-08. It generates approximately ten times the employment of the textiles, clothing and footwear industry and five times that of the automotive sector, but receives less government assistance than either. It earns more in export earnings than these two sectors combined.

Tourism provides opportunities for regional and remote communities to grow jobs, diversify their economic base, and generate higher standards of living. Nearly half of total tourism expenditure (47 per cent) occurs in the regions. Domestic visitors spend relatively more in regional Australia – as much as 53 cents in every tourism dollar, compared to the international visitor spend of 21 cents in the dollar.

Tourism is essential in Australia, accounting for nearly one third (29 per cent or 595,516) of all businesses. Ninety three per cent of all tourism businesses are sole-operator, micro-businesses or small businesses. Only 6.5 per cent are medium sized, employing 20 to 199 persons, and fewer than 0.5 per cent are large, employing 200 persons or more.

In 2007–08 tourism directly employed nearly 500,000 people, amounting to 4.7 per cent of total employment. However, it is not only the sheer number of people that the industry employs that is important. It is the breadth of the employment opportunities that needs to be appreciated.

Tourism requires employees with a broad range of skills and offers a spectrum of jobs from full-time careers through part-time and casual work, which suits the needs of our diverse and modern workforce. It also disperses jobs across the country providing opportunities in regional metropolitan areas alike. It is the multifaceted nature of the tourism workforce that makes the tourism industry such a significant contributor to the employment base of Australia.

Tourism offers enormous potential to Indigenous communities, both to create sustainable jobs and employment and as a means to protect and nurture cultural and environmental heritage.

Despite its economic significance, tourism is not officially classified as an industry by the international statistical standards which underpin the Australian national accounts. To arrive at an official measure, the

Australian Bureau of Statistics (ABS) produces the Australian Tourism Satellite Account. This treatment, which arises due to the nature of the tourism industry, exacerbates the lack of recognition of its broad contribution to the economy.

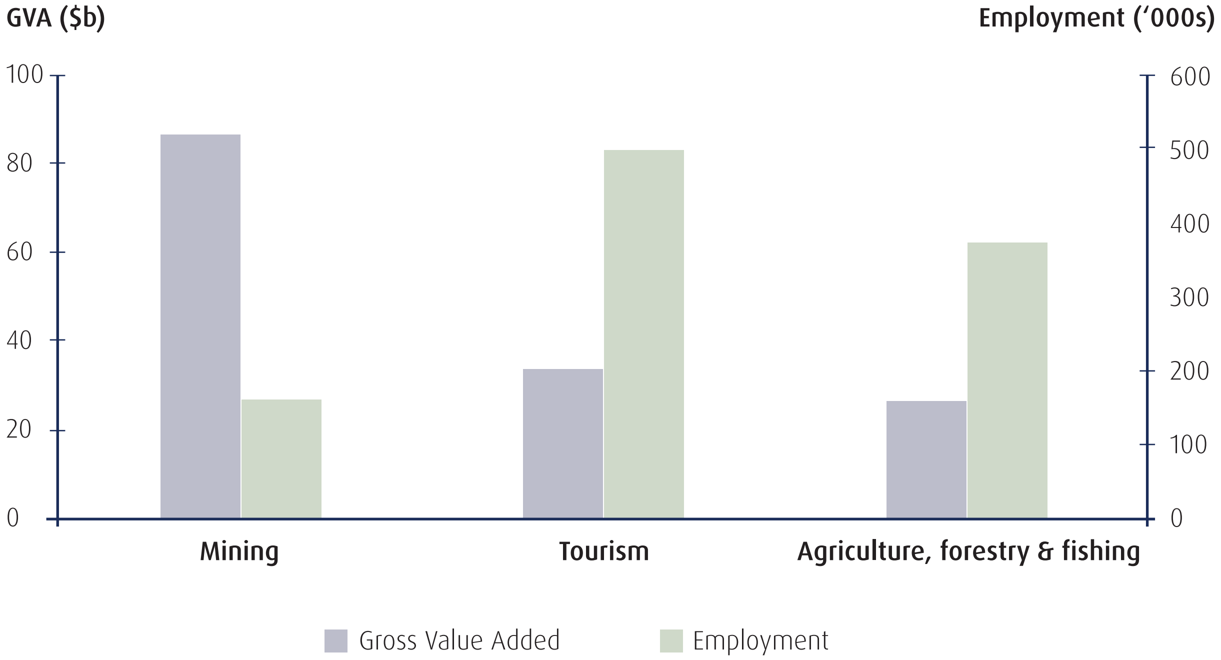
Of Australia's major merchandise export sectors, tourism employs more people than mining, and adds more gross value than agriculture.

Tourism is an important and vital industry to Australia now. It generates wealth and jobs for Australians and disperses economic activity widely across the landscape. It also provides a vehicle for cultural and environmental preservation, and to earn valuable foreign exchange.

However, Australia has become complacent about its tourism industry. In 2000-01 tourism peaked as a share of GDP at 4.7 per cent when it made up 5 per cent of total employment, compared with 3.6 per cent and 4.7 per cent respectively in 2007–08. Since then Australia's tourism industry has under-performed and risks falling into serious decline.

Comparing Tourism Gross Value Added and Employment

Industry Gross Value Added and Employment Sector 2007-08



Sources: Australian Bureau of Statistics, Australian System of National Accounts 2007-08, Cat. No. 5204.0, 2008; Australian Bureau of Statistics, Tourism Satellite Account, 2007-08, Cat. No. 5249.0, 2009; and Australian Bureau of Statistics, Australian Labour Market Statistics, Cat. No. 6105.0, 2008

Note: Labour data for Mining and Agriculture, forestry and fishing are for May 2008

34 : Challenges and Opportunities

To arrest its decline, the tourism sector will need to address some major challenges and grasp key opportunities. In the short-term the industry confronts the impacts of the global economic downturn.

Over the medium and longer-term, the profile of Australia's tourism source markets is changing dramatically, along with the demographic profile of tourists. Non-leisure tourism is likely to rise in visitor numbers and value. Climate change, and government and social responses to it, may have major and unpredictable impacts across the industry, which need to be factored into long-term planning arrangements.

But if Australia gets it right, the long-term prospects for tourism activity are strong. TRA has developed a scenario model from 2007 to 2030 to provide insight into the broad demographic and sectoral market changes Australian tourism will confront, using as its starting point the December 2008 forecasts produced by the Tourism Forecasting Committee.

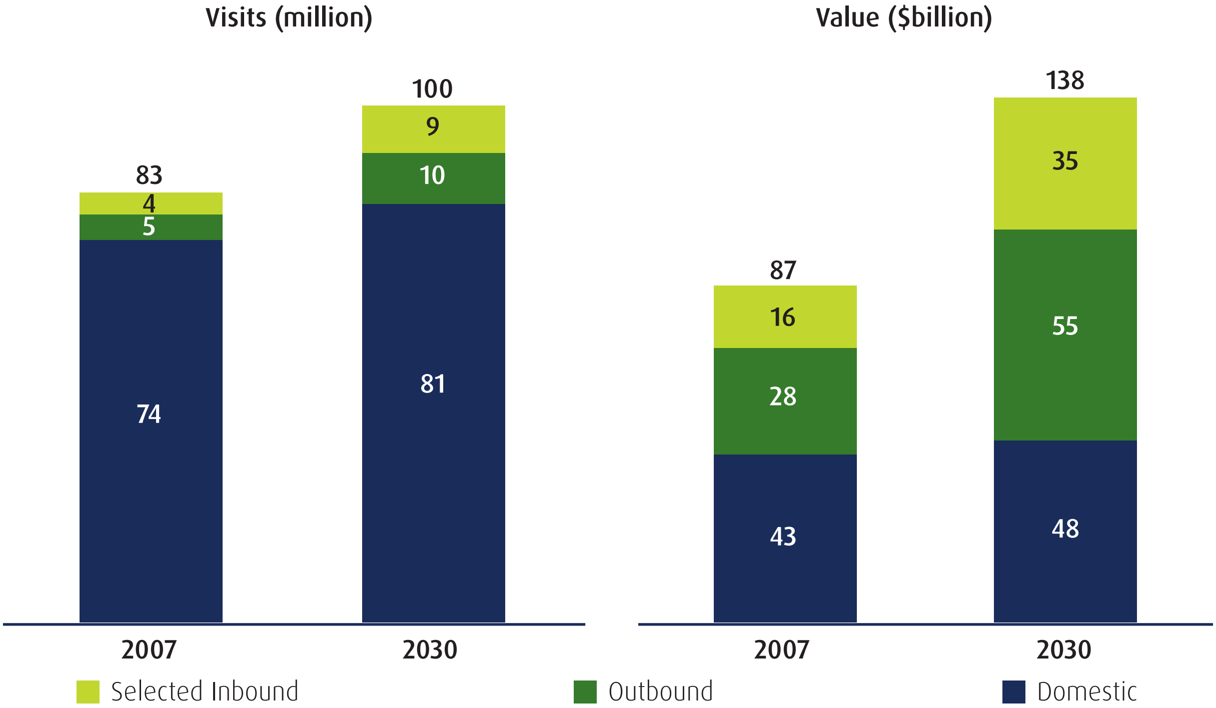
Inbound analysis was restricted to the top ten markets plus India. The TRA scenario model suggests there could be 100 million annual visits, increasing the annual value of tourism expenditure by 60 per cent to around $140 billion.

But to capture these opportunities the Australian tourism sector is going to have to achieve significant performance improvements.

In the short-term the Australian tourism industry will be affected by the global economic crisis. While the industry has bounced back from external shocks before, the magnitude and speed of this downturn has been unprecedented. And it is not clear how long or severe the downturn will be.

As a discretionary expenditure item, tourism can certainly expect to be adversely impacted for as long as economies and income levels decline or remain depressed. United Nations World Tourism Organisation data shows a decline in international tourism growth in the second half of 2008 and indicates this trend will continue through 2009 and possibly into 2010.

Projected tourism activity to 2030



Selected inbound: Top 10 markets plus India, representing about 70% of total inbound visits and value
Domestic: 0-14 years of age traveller cohort not included in scenario model
Source: TRA scenario model developed for the National Long Term Tourism Strategy

Even though the Australian dollar is down from its high of US$0.97 in July 2008, the loss in wealth and consumer confidence in many of Australia's main source inbound markets, and within our own domestic market, will have a significant and continuing adverse impact on tourism demand.

The December 2008 Tourism Forecasting Committee forecasts showed a decline of 4.1 per cent in inbound tourism over 2009 and there is a risk that conditions will continue to deteriorate. Inbound tourism is cautiously projected to return to positive growth from 2010.

Domestic tourism is forecast to remain flat with very slow growth forecast from 2010. And outbound travel is forecast to fall by 2.9 per cent to 5.6 million departures in 2009.

Demographic change will also have dramatic implications for the Australian tourism industry. The most significant development is that the tourists are getting older. In the domestic market, the TRA scenario predicts that growth will be driven by older Australians in the 60 year plus category. Growth in domestic overnight visits and expenditure between 2007 and 2030 is likely to come almost exclusively from the 60 plus years age cohort.

A similar trend is going to affect our inbound markets. The Japanese market already has a very high proportion of 60 plus travellers. There will be sharp drops in the proportion of working age populations in both China and Germany starting from 2010.14 Of our key source markets, India is the only country that will have a growth in the proportion of the working age population out to 2030.

Domestically, the rise of flexible labour markets and two-income families has changed traditional Australian holiday habits. A stockpiling of leave has meant that working Australian families have foregone the annual holiday, and perhaps more ominously, a generation of children is growing up without the habit of a local annual break in their own country. Unless offerings are developed which specifically appeal to young Australians, domestic tourism is at risk over the long-term of losing out to other goods and services, including outbound tourism.

Demographic change will also affect the tourism workforce, particularly the SMEs that dominate the tourism industry. Unless we increase the working age population through migration or increased participation, fewer working age people relative to the total population implies a higher level of taxation on incomes and profits. This would affect not only the supply of labour but also the level of entrepreneurial activity and investment in tourism.

35 : Climate Change

Climate change is going to have short, medium and long-term impacts on Australian tourism.

In the short and medium-term, climate change will create compliance costs associated with government policy reforms and the need to respond to changing consumer perceptions and purchasing behaviours. The impacts of these costs will also flow through in the form of financial risks with rising insurance premiums, changes to business financing and the need for business to incorporate these costs into their plans.

In the medium to long-term, climate change will impose costs due to tourism's dependence on key natural assets and the built environment. The Intergovernmental Panel on Climate Change (IPCC), Fourth Assessment Synthesis Report lists the direct physical impacts Australia will experience:

» Significant loss of biodiversity is projected to occur by 2020 in some ecologically rich sites including the Great Barrier Reef and Queensland Wet Tropics
» By 2030, water security problems are projected to intensify in southern and eastern Australia
» By 2030, production from agriculture and forestry is projected to decline over much of southern and eastern Australia
» By 2050, ongoing coastal development and population growth in some areas of Australia are projected to exacerbate risks from sea level rise and increases in the severity and frequency of storms and coastal flooding

Climate Change 2007: Synthesis Report; An Assessment of the Intergovernmental Panel on Climate Change, December 2007, http://www.ipcc.ch/ipccreports/ar4-syr.htm.

Failure to act on climate change will undermine the tourism industry's capacity to contribute to the economy over time.

The potential impacts of climate change on Australia's natural attractions and tourism related infrastructure will need to be factored into tourism planning processes just

as they are in broader development planning processes. This planning must be supported by analysis of the impacts of carbon prices and changing consumer demand patterns. For example, Australia is at risk of being seen as an environmentally unfriendly choice for international long-haul holiday makers due to the amount of fuel required to get here.

The Australian Government, in partnership with the Australian tourism industry and state and territory governments, developed the Tourism and Climate Change: Framework for Action (the Framework), endorsed by the Tourism Minister's Council. Initial implementation of the Framework has commenced and needs to progress.

An essential element of building the resilience and productive capacity of the tourism industry will be the provision of clear and consistent information to the industry by governments and peak industry bodies, as well as access to the Climate Change Action Fund.

These steps could assist the industry to adapt to climate change impacts and prepare for a carbon constrained future.

36 : Recommendations – Jackson Report 2009

For too long Australia's tourism industry has been complacent. Now it faces major challenges. On top of these, the length and severity of this global downturn may also seriously harm the short-term outlook for the industry.

Its long-term future is by no means assured. With this report the Steering Committee is looking to build a platform for a vibrant and sustainable tourism industry that can increase the prosperity and resilience of our national economy. The aim must be to build on the strength and resilience that the industry has demonstrated, so that it has the capacity to thrive and generate further economic gains for Australia in the face of an intensely competitive environment and the potential for further external shocks to impact on the industry.

This will only be achieved if industry and all levels of government come together to revitalise the industry and secure its future. It will not be enough for government and industry to pursue a 'business as usual' approach.

Australia has a unique Indigenous culture, unrivalled landscapes, sophisticated cities and regions, and people renowned for their diversity and friendliness. Our starting point must be an appreciation of these competitive strengths and a determination to capitalise upon them over the long-term.

Through the course of its deliberations, the Steering Committee has identified specific supply-side issues that must urgently be addressed to counter the Australian tourism industry's relative decline. Only effective alignment between supply and demand-side strategies will deliver optimal long-term outcomes for the industry, and the Australian economy and community as a whole.

The recommendations that follow represent the Steering Committee's practical advice on measures to build a strong and sustainable Australian tourism future.

Research

1) Develop a high-powered national research capability focussed on tourism industry development, to complement the existing capability in demand-side research and statistics.

Digital distribution

2) Urgently support the acceleration of the online capability of Australian tourism product, working with State and Territory Tourism Organisations to fund programs that expand cost-effective digital platforms for distribution and bookings and accelerate SMEs' uptake.

National scorecard

4) Establish a comprehensive national tourism scorecard with targets and key performance indicators (KPIs) for economic impact, environmental impact, social impact and product quality.

COAG

5) Incorporate a stronger recognition of tourism in government planning and approval process, taxation and infrastructure investment planning. The Steering Committee recommends that the Council of Australian Governments (COAG) undertake an urgent systemic review of planning and regulatory regimes and the Henry tax review take account of issues that impact tourism investment.

Product Development and Innovation

6) Renew and rebuild Australia's competitiveness by developing and maintaining long-term product strategies for Australia.

Leadership and industry coordination

7) The Prime Minister to establish a federal ministerial taskforce to periodically review tourism issues and opportunities that are shared with key non-tourism portfolios.

Industry

8) Industry associations to lead industry participants to work with the government to make these recommendations successful.

Restructure

9) Restructure Tourism Australia to enable it to implement these recommendations.

Background

Tourism Forecasting Committee

The TFC was established in 2004 following the implementation of the Tourism White Paper. Like its predecessor, the Tourism Forecasting Council, the TFC is an independent body charged with providing present and potential tourism investors, industry and government with consensus forecasts of activity across, domestic, outbound and international tourism sectors. The resources to run the TFC are provided by TRA.

Chaired by Bernard Salt (KPMG), the TFC's membership draws on the combined expertise of the private and public sectors in the tourism and financial industries. The TFC is supported by a technical committee which also has a mixture of private and public sector representation and relevant experience with which to inform decision making.

The Tourism Forecasting Committee

Bernard Salt (Chair)	KPMG
Andrew McEvoy	Tourism Australia
Daniel Gschwind	Queensland Tourism Industry Council
Euan Robertson	Tourism & Transport Forum
Ivan Colhoun	ANZ Bank
Jane Madden	Department of Resources, Energy and Tourism
Matt Hingerty	Australian Tourism Export Council
Stephanie Buckland	Tourism Western Australia
Tony Webber	Qantas Airways Limited

The Tourism Forecasting Committee Technical Committee

Wayne Calder (Chair)	Tourism Research Australia
Adele Labine-Romain	Tourism & Transport Forum
Ernst Krolke	Airport Coordination Australia
Jeff Oughton	Australian Bankers' Association
Karen Wales	Jones Lang LaSalle
Nell Anderson	Tourism Australia
Philippe Klee	Qantas Airways Limited
Tim Quinn	Department of Resources, Energy and Tourism

Methodology

Forecasts for domestic, outbound and inbound travel and economic value are calculated using an iterative process. In the first iteration, the TRA Forecasting and Modelling team estimates activity and expenditure using a combination of econometric and time series models. These models provide forecasts based on aviation capacity, price, income and seasonality as well as significant events affecting source markets. The second iteration involves a sub-committee (the TFC Technical Committee) made up of senior researchers and economists as well as independent advisors reviewing the model-based forecasts and applying qualitative adjustments. The final iteration involves industry and government experts (the TFC) adjusting the forecasts by consensus.

The TFC forecasts represent the most likely outcome given past trends, current information and the impact of policy and industry changes. Therefore, it is important to note that the TFC produces ‘forecasts’ as distinct from ‘targets’ where the latter are developed for business planning purposes for planning and performance management.

Revised Tourism Satellite Accounts estimates

Users should note that the historical estimates for Total Inbound Economic Value (TIEV) and Total Domestic Economic Value (TDEV) have been substantially revised. The revisions reflect changes to the methodology for calculating tourism consumption in the annual Tourism Satellite Account (TSA) series in which the Australian Bureau of Statistics (ABS) measures the contribution of the tourism industry to the Australian economy.

The substantial methodological revisions were due to the implementation by the ABS of the *United Nations World Tourism Organization’s Tourism Satellite Account Recommended Methodological Framework (TSA: RMF 2008); the Australian and New Zealand Standard Industrial Classification (ANZIC 2006); International Recommendations for Tourism Statistics 2008* (IRTS 2008) and the *System of National Accounts 2008 (SNA 2008).*

These revisions led to large downward revisions to estimates for international tourism consumption, which the TFC uses to benchmark the estimates for TIEV. On the other hand they have resulted in large upward revisions for TDEV. This also means that TDEV accounts for a much larger share of total consumption than in previous published estimates.

Executive summary

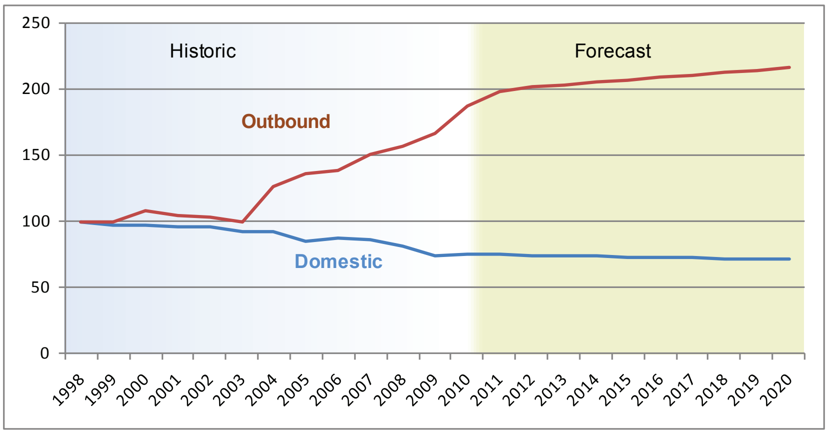
Key messages

- Total tourism consumption is forecast to increase by 0.6% in 2010 and at the faster rate of 2.2% next year to be $97.3 billion in 2011. This represents a downward revision in growth for this year but growth in line with previous expectations for 2011.
- Longer term, total tourism consumption is forecast to reach $110.5 billion in 2020 underpinned by an annual average growth rate of 1.4% over the 2009–2020 period. Most of this growth is expected to come from stronger international visitation.
- Domestic visitor nights are forecast to rise by 1.0% this year (down from the previously expected 1.5%) and 0.6% next year to reach 261 million in 2011. Over the longer term (2009–2020), the annual average growth rate has been revised downward from 0.6% to 0.3%. A similar profile is forecast for domestic overnight trips.
- Outbound departures are forecast to grow by 15% to 7.2 million in 2010 (an upward revision from the previous forecast of 13.4%). Over the longer term outbound travel is expected to rise on average by 4.5% each year between 2009 and 2020.
- Inbound visitor arrivals are forecast to increase at similar rates this year (5.3%) and next year (5.6%) to reach 6.2 million in 2011. The expected annual average growth rate remains unchanged from previously forecast at 3.9% over the long term.
- Supported by relatively stronger economic growth, arrivals from Asia are expected to remain strong in 2010 and 2011, most notably from China, Indonesia and Japan. Over the period to 2020, the share of inbound arrivals from Asia is forecast to increase from 38% to 42%.

1. Domestic and outbound travel

In the past decade the travel patterns of Australian residents have shifted with an increased focus on travel abroad in terms of trips per capita (propensity). While the propensity for outbound travel has continued to increase, propensity for domestic travel has declined. The TFC forecast that these propensity trends will continue in the period to 2020 (Figure 1).

Figure 1 Propensity for domestic and outbound travel (overnight and outbound trips) Index base 1998 = 100*



** Note: This figure makes use of a rolling annual index. The index plots percentage change over time against a base year. The 1998 calendar year is used as the base year and is assigned a value of 100. Where later values exceed 100 it indicates growth in comparison to the base year while values less than 100 indicate decline compared with the base year.*

The strength of the Australian dollar since 2004 has been a major factor driving Australian outbound travel and conversely reducing the competitiveness of domestic tourism. However, domestic tourism has also been challenged by Australia's solid economic performance making overseas travel more affordable; strong growth in international air capacity servicing Australia; and an inability to compete effectively against alternative consumer preferences.

In terms of travel activity, domestic tourism experienced record lows in 2009 and overall there has only been limited recovery so far in 2010 for overnight trips and visitor nights. Recovering from the Global Financial Crisis (GFC) downturn, the domestic business sector has been buoyant, recording a strong increase in visitor nights (up 7.2% on the previous year), while there has also been some increase in nights spent visiting friends and relatives (VFR). However, the gains from business and VFR have been largely offset by a fall of 2.0% in holiday nights.

With already moderate performance to date in 2010, domestic tourism is likely to come under renewed pressure in the last half of 2010 and 2011 as the recent sharp appreciation in the Australian dollar further erodes the competitiveness of the sector against outbound travel and imported consumer items. Based on these factors:

- The domestic visitor night forecast has been revised downwards to 259.3 million for 2010 (1.0% growth rather than the previously expected 1.5%). Over the longer term, visitor nights are now forecast to increase at an annual average rate of 0.3% (previously 0.6%) and reach 267 million in 2020.

- The overnight trip forecast has been revised downwards to increase by 1.1% to 66.8 million (the previous growth forecast was 1.8%). Over the longer term, overnight trips are forecast to increase by 0.6% annually between 2009 and 2020.

Business travel is the only domestic segment for which forecasts have been revised upwards in 2010. Given the strength of the recovery in business travel during the first half of the year it is now forecast that there will be 38.6 million visitor nights for business in 2010—an increase of 7.2% (rather than 2.2%).

Despite the expectations for continued strong growth in business travel in the latter part of 2010, there has been a downward revision to forecasts of paid accommodation nights for domestic travellers due to the weakness in the holiday market. These are now forecast to increase by 3.4% in 2010 (previously 7.8%) and 3.3% in 2011 (previously 4.0%). Over the long-term annual average growth of 1.7% is expected between 2009 and 2020.

Outbound travel has increased strongly to August 2010. With increasingly favourable exchange rates and continued expansion in international seat capacity to key leisure destinations in South East Asia, strong growth is expected to continue in the latter part of 2010. As a result, the forecast for outbound travel has been revised upwards to 7.2 million or 15% growth in 2010 (previously growth of 13.4% was expected).

Asian and Pacific destinations are leading the very strong growth in Australian outbound travel. In 2010, growth is forecast to be 37% for Indonesia and Fiji, 18% for China, 16% for Thailand and 15% for Malaysia. Outbound travel to the United States is also forecast to increase 23% on the back of further increases in air seat capacity.

Over the longer term, outbound travel is expected to grow by an annual average rate of 4.5% between 2009 and 2020. On this basis, it is expected that outbound travel will continue to exceed international arrivals for each year of the forecast period. By 2020, the number of outbound trips is forecast to reach 10.2 million or around 1.7 million more trips than international arrivals to Australia.

2. Inbound travel

In light of the strong appreciation of the Australian dollar, the forecast growth in inbound arrivals for 2010 has been revised downward marginally from 5.5% to 5.3%, but around 5.9 million visitors are still expected to visit Australia for the year. In contrast, with strong growth in air capacity from Asia—particularly China—expected to continue into next year, visitor growth for 2011 has been revised upward slightly to 5.6% (from 4.9%) with 6.2 million arrivals forecast. Over the longer term, inbound arrivals are expected to grow at an annual average rate of 3.9% between 2009-2020 and reach a projected 8.5 million in 2020.

At the market level, there have been a few notable revisions to visitor arrival forecasts for 2010 and/or 2011. The largest upward revisions have been for:

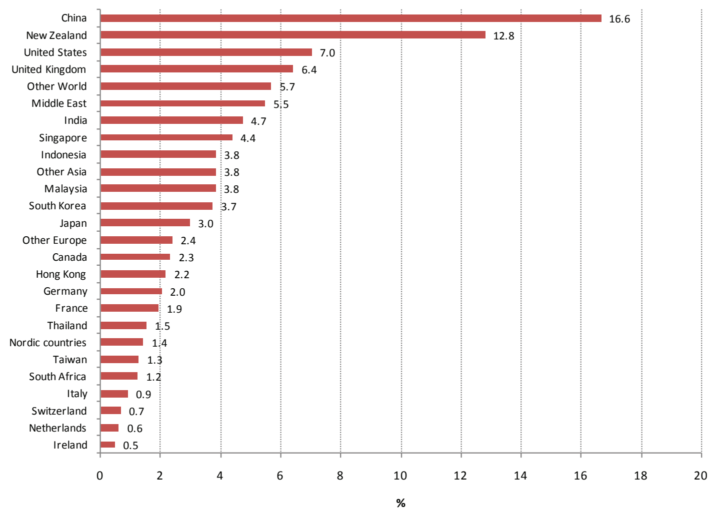
- China - with visitor arrivals now forecast to increase 18.8% in 2010 (rather than 9.4%) and 21.9% in 2011 (rather than 10.6%);
- Japan – with visitor arrivals now forecast to increase 11.9% in 2010 (rather than 0.8%);
- South Africa – with visitor arrivals now forecast to increase 4.1% in 2010 (rather than 0.5%); and
- Indonesia – with visitor arrivals now forecast to increase 21.0% in 2010 (rather than 19.0%).

The largest downward revisions include:

- Thailand – with visitor arrivals now forecast to increase 1.7% in 2010 (rather than 11.4%);
- United States – with visitor arrivals now forecast to increase 1.6% in 2010 (rather than 8.8%); and
- South Korea – with visitor arrivals now forecast to increase 3.8% in 2011 (rather than 6.5%).

Asian markets are increasing their share of total inbound arrivals led by China and this trend is expected to continue. Between 2009 and 2020, the Asian market share is forecast to grow from 38% to 42%. Over the same period, China is expected to account for nearly 17% of the growth in international visitor arrivals to Australia (Figure 2) and by 2018 become Australia's second largest inbound market in terms of arrivals behind New Zealand. The Middle East (10.4%) and India (8.9%) are the only countries expected to have average annual growth equivalent to or greater than China (8.5%) in the long term.

Figure 2 Countries contribution to growth in inbound arrivals between 2009 and 2020



Coinciding with implementation of measures to improve the integrity of processing student visa applications, Department of Immigration and Citizenship (DIAC) data shows there was a sharp fall in grants in the 2009-10 financial year, particularly from India and to a lesser extent Thailand, Malaysia and South Korea. In recent times, international education visitors have also started to decline. As a result, there has been a downward revision (from 7.5% to 2.7%) in the growth forecast for inbound arrivals for 'other' reasons (which includes those visiting for education and employment) in 2011. The longer term annual average growth forecast has also been reduced from 6.4% to 5.1%.

Although education visitors comprise only a small proportion of inbound arrivals, their average length of stay is considerable. As such, any movements in their visitation patterns can be significant for international visitor nights and consumption. In addition, there are close links between education and VFR travel as many international students are visited by family and/or friends while in Australia. Given these factors, the TFC and TRA will continue to monitor closely movements in visitor arrivals for education and student visa grants and undertake further analysis of the relationship between these two measures.

3. Aviation

The global aviation industry has faced some serious challenges in the past decade, none more than the GFC period with passenger traffic falling by 3.5% in 2009. However, passenger numbers have rebounded strongly so far this year with 8% growth reported to August 2010 (Source IATA). The Asia Pacific region—which includes Australia—is leading the recovery with passenger traffic up 10%. Growth has been more moderate in North America (4%) and Europe (1.5%).

Despite the GFC, there was a 5% increase in Australia's international seat capacity in 2009. This growth in seat capacity is expected to continue in 2010 and 2011 with growth of 6% and 7% respectively, driven mainly by an increase in direct flights from Asia and in particular China (40% growth expected in 2011). Over the longer term, international aviation capacity is projected to grow at an annual average rate of 3.9% between 2009 and 2020, slightly higher than expected in the previous forecast round.

4. Accommodation

Results from the latest TRA surveys indicate that total nights in paid accommodation is up 10.9% in 2009-10. However, the latest results from the Survey of Tourist Accommodation (ABS Cat No. 8635.0, Tourist Accommodation, Australia, June quarter 2010) report only moderate growth in takings (0.6%) for all accommodation establishments over the same period. This suggests that yields (takings per room/visitor) remain under pressure.

Demand for commercial accommodation has been revised downwards to 2.9% (the previous forecast was 6.1%) for 2010 and it is expected to increase by 2.2% annually between 2009 and 2020. The revision for 2010 has been driven by lower than expected growth for domestic accommodation demand. In contrast, forecasts for international accommodation demand remain much the same as previously expected. As a result, the inbound share of total accommodation demand is expected to increase from 25% in 2009 to 29% in 2020.

Table 1 TFC Forecast summary

	Inbound visitor arrivals '000	Change on previous year %	Domestic visitor nights million	Change on previous year %	Outbound depart. '000	Change on previous year %	TIEV[a] (real) $billion	Change on previous year %	TDEV[b] (real) $billion	Change on previous year %	Consumption[c] (real) $billion	Change on previous year %
1999	4 459	n.a.	294.3	n.a.	3 210	n.a.	20.1	n.a.	70.8	n.a.	90.9	n.a.
2000	4 931	10.6	293.4	- 0.3	3 498	9.0	23.0	14.7	73.1	3.2	96.1	5.7
2001	4 856	- 1.5	289.6	- 1.3	3 443	- 1.6	23.4	1.7	71.1	- 2.8	94.5	- 1.7
2002	4 841	- 0.3	298.7	3.1	3 461	0.5	23.2	- 0.8	71.9	1.1	95.1	0.6
2003	4 746	- 2.0	294.1	- 1.5	3 388	- 2.1	21.4	- 7.7	70.1	- 2.4	91.6	- 3.7
2004	5 215	9.9	296.9	0.9	4 369	28.9	22.4	4.8	69.7	- 0.6	92.2	0.6
2005	5 499	5.4	275.9	- 7.1	4 756	8.9	21.8	- 2.9	69.8	0.1	91.6	- 0.6
2006	5 532	0.6	285.7	3.6	4 941	3.9	23.2	6.6	71.7	2.8	95.0	3.7
2007	5 644	2.0	288.6	1.0	5 462	10.6	23.7	1.9	75.3	4.9	98.9	4.2
2008	5 586	- 1.0	271.8	- 5.8	5 808	6.3	24.1	1.9	74.2	- 1.4	98.3	- 0.6
2009	5 584	0.0	256.7	- 5.6	6 285	8.2	23.7	- 1.5	70.8	- 4.5	94.6	- 3.8
2010	5 879	5.3	259.3	1.0	7 225	15.0	24.2	1.9	71.0	0.2	95.2	0.6
2011	6 208	5.6	260.7	0.6	7 784	7.7	25.5	5.4	71.7	1.1	97.3	2.2
2012	6 486	4.5	261.8	0.4	8 149	4.7	26.6	4.2	72.3	0.8	98.9	1.7
2013	6 747	4.0	262.6	0.3	8 408	3.2	27.6	3.9	72.8	0.7	100.4	1.6
2014	6 998	3.7	263.4	0.3	8 650	2.9	28.7	3.7	73.3	0.7	101.9	1.5
2015	7 244	3.5	264.1	0.3	8 894	2.8	29.7	3.5	73.7	0.6	103.4	1.4
2016	7 487	3.4	264.7	0.2	9 146	2.8	30.7	3.3	74.2	0.6	104.9	1.4
2017	7 728	3.2	265.3	0.2	9 406	2.8	31.6	3.1	74.6	0.6	106.3	1.3
2018	7 973	3.2	265.8	0.2	9 660	2.7	32.6	3.1	75.1	0.6	107.7	1.3
2019	8 221	3.1	266.3	0.2	9 923	2.7	33.6	3.0	75.5	0.6	109.1	1.3
2020	8 469	3.0	266.7	0.2	10 183	2.6	34.6	2.9	75.9	0.6	110.5	1.3
Compound annual growth rate (%)												
1999-2004	3.2	-	0.2	-	6.4	-	2.3	-	-0.3	-	0.3	-
2004-2009	1.4	-	-2.9	-	7.5	-	1.1	-	0.3	-	0.5	-
2009-2014	4.6	-	0.5	-	6.6	-	3.8	-	0.7	-	1.5	-
2014-2020	3.2	-	0.2	-	2.8	-	3.2	-	0.6	-	1.4	-
1999-2009	2.3	-	-1.4	-	6.9	-	1.7	-	0.0	-	0.4	-
2009-2020	3.9	-	0.3	-	4.5	-	3.5	-	0.6	-	1.4	-

Numbers shaded are forecasts.

[a] Total Inbound Economic Value (TIEV): estimates and forecasts based on Australian National Accounts: Tourism Satellite Account, 2008-09, ABS Cat No 5249.0

[b] Total Domestic Economic Value (TDEV): estimates and forecasts based on Australian National Accounts: Tourism Satellite Account, 2008-09, ABS Cat No 5249.0

[c] Consumption refers to total consumption made in Australia by international short term visitor arrivals and Australian resident tourists. It is the sum of real TIEV and real TDEV (Q2 2010=100)

The economic outlook and tourism

1. World economic performance and outlook

Following the deepest recession since the 1930s last year, the world economy has returned to growth in 2010 but remains patchy. The International Monetary Fund (IMF) estimates global economic growth of 4.8% in 2010 with this moderating slightly to 4.2% in 2011. The IMF points to a likely two-speed world economy in 2011 with sluggish 2.2% growth in advanced economies more than offset by strong economic activity in emerging and developing economies (up 6.4%).

The downside risks to global growth are the sluggish recovery in Western Europe, the US and Japan. Many of these economies are now burdened with high public debt and persistently high unemployment. Latest government response has been varied with many Euro zone countries introducing austerity measures to reduce public debt, but the US announced a second round of quantitative easing (primarily increasing money supply) to boost domestic consumption and employment.

Table 2 Economic performance and outlook for key Australian tourism markets

	2009	2010	2011	2012	2013
			% growth		
New Zealand	-1.6	2.1	3.2	3.0	2.6
Japan	-5.3	3.0	1.2	1.8	1.7
United Kingdom	-4.9	1.6	1.9	1.9	2.3
United States	-2.4	2.7	2.4	3.3	3.2
China	9.1	9.9	9.0	8.7	8.7
Australia	1.3	3.3	3.5	3.5	3.3

Source: Consensus Economics Forecasts, October 2010. Figures for 2012 and 2013 are TFC assumptions.

2. Australia's economic performance and outlook

With the aid of strong trade links to Asia and a Commonwealth Government stimulus package, Australia weathered the GFC better than most developed countries (growth of 1.3% in 2009). This resilience is expected to continue with the Australian economy now forecast to return to trend growth of around 3.3% in 2010 and 3.5% in 2011 on the back of resurgent commodity exports, solid employment growth and a gradual decline in the unemployment rate (to 5.1% in August 2010).

The Reserve Bank has increased interest rates progressively since their low of 3.0% in May 2009. The official rate is now 4.75%, still below the national long-term average but high compared with most other developed countries, particularly Japan, parts of Europe and the US where interest rates are at or near zero. This gradual upward movement in interest rates is likely to be putting some pressure on discretionary consumer spending such as travel and tourism.

3. *The strong Australian dollar and tourism*

Australia's strong economic performance, high relative interest rates and demand for Australian commodities have been important drivers of the strength of the Australian dollar against many international currencies including the US dollar, UK Pound and Euro (Table 3).

Since mid October 2010, the Australian dollar has been fluctuating near or above parity with the US dollar. Consequently, forecasts of the value of the Australian dollar have been upgraded to around US$0.93 in 2011 from the previous US$0.88. Over the projection period the Australian dollar is assumed to depreciate to US$0.81.

Table 3 Exchange rate: value of Australian dollar versus selected currencies

	Jan-10	Jun-10	Oct-10	Change Oct/Jan 2010
New Zealand	1.27	1.23	1.30	2.4%
Japan	80.12	75.46	80.73	0.8%
UK	0.55	0.57	0.62	12.7%
United States	0.89	0.85	0.98	10.1%
China	6.08	5.79	6.54	7.6%
Singapore	1.25	1.19	1.28	2.4%
Europe (Euro)	0.64	0.70	0.71	10.9%

A stronger Australian dollar not only has an impact on attracting international visitors to Australia it also reduces the spending power of international visitors once they are here. Conversely, a stronger Australian dollar is having a positive influence on outbound travel by Australians reducing the competitiveness of domestic tourism compared with travel abroad. Thus, the current value of the dollar is fostering growth in Australians choosing to holiday overseas.

4. *Oil prices*

Fuel is a large cost component for international carriers and increasing demand for oil is starting to put pressure on airline costs and increase the likelihood of airfare rises. Fuel prices are also an important consideration for domestic travellers in Australia, with around 70% of overnight visitors travelling to their destination by motor vehicle. Consequently, fuel prices play a significant role in influencing all tourism segments.

World oil prices tend to increase in association with stronger economic growth. Although remaining somewhat volatile, world indicator crude oil prices have recovered slightly in recent months from a low of US$74 in May 2010 to reach US$82 in October 2010 as demand increases.

Consensus Economics forecast the increase in world oil prices to continue over the next year backed by the expected slow rebuild of global demand for oil. So far, the effect of increasing oil prices has been cushioned in Australia to some extent by the strong appreciation in the Australian dollar. However, higher domestic fuel prices may be a prospect if the Australian dollar were to steadily depreciate or if global oil prices moved upward more strongly than expected on the back of stronger growth next year and beyond.

38 : Queensland Tourism Perspective

Tourism in Queensland

Tourism Queensland has a vision to build a sustainable, compelling and effective global brand platform for Queensland and our first global brand line, Queensland, Where Australia Shines, will play a critical role in realising this vision.

While the previous brand creative 'Where Else But Queensland' has served Queensland's tourism industry well over the past 12 years, research showed it was time for a change. The new brand creative, Queensland, Where Australia Shines, was developed after extensive research and consultation and drew on the expertise of our industry partners.

It represents an evolution from a destinations-based approach to marketing our whole state, with all of its distinct and unique destinations, to take a holistic view of tourism in Queensland for the first time.

The new creative approach encompasses Queensland as a whole and captures Queensland's incredible diversity and uniqueness throughout Queensland under four key themes; Queensland Lifestyle; Islands and Beaches; Natural Encounters; and Adventure. The approach also includes five regional marketing brands for Gold Coast, Tropical North Queensland, The Whitsundays, Sunshine Coast and Brisbane. Research highlighted the benefits of differentiating these specific destinations with individual brand platforms while maintaining creative continuity with the Queensland brand to build an integrated brand family.

The global brand platform is the result of a shift in Queensland's marketing approach to focus on the tourism experience and the consumer's emotional response rather than just focusing on Queensland's attributes. This shift in approach is validated by the Queensland brand story - a place to enrich and transform the lives of those who are prepared to travel that little bit further for a greater reward.

» Directly and indirectly employs 222,000 Queenslanders
» Contributes $9.2 billion to the Queensland economy
» Generates $3.8 billion annually as an export earner

December 2010

Employment

In 2007-08 tourism directly accounted for 122,000 jobs and indirectly accounted for 100,000 jobs, or in total 10.3% of employment in the state. This is substantially more than the mining sector (38,100 direct jobs) or even agriculture, forestry and fishing (81,900 direct jobs).

Retail trade had the largest share of tourism employment (28.1%), followed by accommodation (20.6%) and cafes and restaurants (14.6%).

(Source: Tourism Satellite Accounts STCRC 2007-08)

Gross State Product (GSP)

In 2007-08 direct and indirect tourism GSP was $15.6 billion, or 7.3% of total Queensland GSP.

Contributes $9.2 billion to the Queensland economy and accounts for 4.7% of Queensland's GSP.

Indirectly contributes an additional $6.4 billion to the Queensland Economy.

(Source: Tourism Satellite Accounts STCRC 2007-08)

Tourism businesses in Queensland

In the year ended June 2007, Queensland had 115,500 tourism related businesses, representing 28.5% of all registered businesses in the state.

Queensland tourism related businesses account for 19.7% of all tourism related businesses in Australia.

No other sector of the economy has more small businesses, with 9in 10 tourism businesses employing less than 20 persons.

(Source: Tourism Research Australia, Australian Bureau of Statistics)

Tax revenue

Net taxes on tourism products arising from tourism consumption in Queensland raised $1.7 billion in federal, state and local government revenues, and was25% of total taxes on tourism products as a whole.

(Source: Tourism Satellite Accounts STCRC 2007-08)

Exports

For the year ended December 2010 tourism exports were $3.8 billion for Queensland.

(Source: International Visitor Survey, Tourism Research Australia)

Visitor expenditure

For the year ending December2010 domestic overnight visitors spent $11.5billion, domestic day visitors spent $3.7 billion and international visitors spent$3.8 billion.

(Source: International and National Visitor Surveys, Tourism Research Australia)

39 : Queensland, Where Australia Shines

Queensland, Where Australia Shines captures the essence of what sets us apart from and above our competitors. It boldly positions Queensland as home of the best holiday experience Australia has to offer, a beautiful Australian holiday destination famous for sunshine, but also for unforgettable experiences and shining Queenslanders themselves.

The new brand platform is a great creative initiative - it sets the course of our long-term strategy for Queensland's tourism future. This strategy includes tactical initiatives; public relations and strategic partnerships; retail campaigns and targeted campaigns with key partners to life and ultimately, to generate an increase in expenditure and visitation to Queensland.

'Queensland, Where Australia Shines' is:

» A new way of communicating everything Queensland has to offer visitors

» The first global tourism brand platform for Queensland with a creative approach encompassing Queensland as a whole and its regions

» The brand line captures the essence of what sets us apart from and above our competitors - it boldly positions Queensland as the best holiday experiences Australia has to offer - a beautiful holiday destination famous for sunshine, but also our unforgettable experiences and shining Queenslanders themselves

» The platform for presenting Queensland's unique and diverse offerings in Queensland through four key themes: Queensland Lifestyle; Islands and Beaches; Natural Encounters; and Adventure

» A shift in Queensland's marketing approach to focus on tourism experiences and the consumer's emotional response rather than just focusing on Queensland's attributes

» A long-term strategy for Queensland's tourism future including tactical initiatives, public relations and strategic partnerships, retail campaigns and targeted campaigns with key partners

» A chance to consolidate financial and human resources, increase exposure for Queensland experiences across the state, target media more effectively and satisfy consumer demand

» About generating a measurable increase in expenditure and visitation in both the short term and long term, all within a responsible marketing budget

In early 2009 Tourism Queensland embarked on the journey to create a new brand for Queensland.

Objective

The key objective of the creative journey was to evolve Queensland as a holiday destination rather than reinvent it. Queensland has always been a popular holiday destination for Australians and travellers from across the globe, and Tourism Queensland undertook the process of refreshing Queensland's image to inspire travellers to come here for the first time, or to come back.

Laying the foundations

Determining the right positioning for Queensland and five regional marketing brands involved an extensive research, consultation and creative process. Tourism Queensland sought input from over 6000 consumers and the industry - input from the consumer in terms of understanding what was important to them, and input from the industry to make sure we understood the industry's vision and how they wanted to present Queensland and its destinations.

The consumer input resulted in domestic segmentation based on consumer psychographics (wants and needs), as opposed to more traditional demographic segmentation based on age and income. Traditional methods of research assume everyone in the same age group or with the same income acts in a similar way. However, it is more productive to understand our visitors' needs and wants, thus maximising the impact of the marketing dollar and communicating more effectively. By understanding the genuine holiday needs and motivations of our visitors, we can customise our communications to them by offering tailored experiences.

As part of the research process, consumer usability testing was conducted with key market segments on www.queenslandholidays.com.au to ensure that the needs of our primary visitor markets when planning their holidays were being met.

Creative Strategy

Our new strategic proposition was derived from the understanding that people are drawn to Queensland for a holiday not just because of our beautiful places and experiences, but more so because of the way our visitors feel as a result of this holiday. The strategic proposition Queensland, Where Australia Feels Most Alive was the inspiration for the brand line Queensland, Where Australia Shines.

Creative concepts for the Queensland brand were developed for Queensland and the five regional marketing brands. The creative concepts were tested in Brisbane, Sydney and Melbourne before a photographic and film shoot and the creative production were undertaken.

The evolution of the Queensland brand represents a move away from just talking about the great places and experiences on offer in Queensland. It adds to the mix, the amazing feelings the places, experiences and people of Queensland generate - an emotional territory for Queensland as a whole and its five regional marketing brands. It is about how a holiday in Queensland makes you feel rather than what you do.

The brand positioning presents Queensland as the destination that boasts Australia's best holiday experience. The brand 'look and feel' will be used across all Tourism Queensland's touch points ranging from global marketing campaigns to consumer and corporate websites, signage, stationery and marketing collateral. Queensland's tourism industry will also use the creative elements to support their marketing campaigns.

Queensland's new brand creative is a vital component of the Global Brand Strategy - a strategy that sets the direction to ensure Queensland's destinations and experiences are positioned in a way that connects with our visitors. The plan has been developed to enable Queensland to reposition its brand platform and activate the Queensland brand across all of its promotions, product, people and processes.

Global Brand Strategy goals

» Grow global awareness and Queensland's market share of tourism expenditure and visitation
» Develop a sustainable, compelling and effective global brand platform for Queensland, then continue this to develop sustainable, compelling and effective brands for the five major destinations that link strongly to brand Queensland
» Position Queensland as the brand leader - Australia's number one holiday experience
» Build brand advantage over competitors through a brand that emotionally connects with our target markets
» Strengthen awareness of Queensland and its destinations

Overview

Unique positioning can translate into a powerful brand.

Determining Queensland's unique position involved discovering and marrying our consumer's insights and our industry's vision - input from our visitors to understand what was important to them, and input from our industry to make sure we understood their vision and how they wanted to present Queensland and its various destinations.

On the national stage, Queensland defines and encapsulates the BEST of Australia's signature experiences.

We asked 6000 Australians their points of view on areas such as holiday making and their perspectives of various holiday destinations around Queensland to arrive at our core promise Queensland, Where Australia Feels Most Alive. This was the inspiration for Queensland, Where Australia Shines.

Tourism Queensland researched this positioning throughout Australia to ensure it was inspirational and believable.

Queensland Brand Story

Queensland has a unique and captivating story to tell. It defines and expresses the core truth about who we are and drives our interactions with our visitors.

We live in a global market crammed with tourism destinations, where time is the international currency in short supply, where the joy of travel is frequently supplanted by the purchase of a new electronic gadget, and where there are lots of opportunities for interaction, but few for meaningful connections. Discerning travellers are looking to get beyond superficial experiences and promises in search of more meaningful and enriching experiences.

By contrast, Queensland emerges as a place to enrich and transform the lives of those who are prepared to travel that little bit further for a greater reward.

Queensland is not about 'lifestyle' - Queensland is a way of life. Queensland is not just about sunshine - it's about big blue skies full of promise. It's not about heat - it's about warmth. It's not just about scenery - it's about a place to indulge the senses, and to experience, enjoy and understand a place of unique natural wonders. Queensland doesn't just rely on built architectural draw cards, it's about the transformation that comes from getting under the skin of the place. It's about visitor value - not just visitor volume.

Queensland is about why we love living in Queensland. It's about adding value to people's experiences - about what to enjoy and how best to enjoy it. It's about discovering and sharing the magic of Queensland that only locals can know and understand - but are happy to share.

Now more than ever, brands are essential corporate assets and are at the heart of successful marketing endeavours. It is therefore essential that our brand sets us apart from others in the market.

With this in mind, the brand boldly positions Queensland as the signature Australian experience - a beautiful Australian holiday destination famous for sunshine, but also the shining essence of our incredible destinations, unforgettable experiences and shining Queenslanders themselves.

Queensland, Where Australia Shines is the foundation that all Tourism Queensland communication will be built on. Leveraging the word Australia, the brand has universal appeal and will enable our tourism industry to develop more effective marketing activities based on the tourism experience and our visitor's emotional response rather than just Queensland's attributes.

Why does Queensland, Where Australia Shines ring so true?

» It has the potential to put Queensland on a pedestal for the entire world to admire
» The thought and line are born out of something Queensland already owns - the beautiful climate and laid back attitude
» When people are happy, they shine. Their faces radiate the same joy, warmth and love that Queensland does

- In a more rational sense, Queensland's unique destinations are all shining examples of what makes Australia great
- We want people to see Queensland as the one place in the world where they'll get their chance to shine
- For Australian visitors - it means Queensland is the place where they can have a holiday that makes them shine and feel the best they have ever felt
- For international visitors - it means that Queensland will offer them signature Australian experiences, with an amazing feeling of being adventurous, curious, and worldly

All regions form the brand experience and will be profiled around four key themes:

- Queensland Lifestyle... food, wine, produce, events, shopping, indulgence Queensland style
- Islands and Beaches... reef experiences, water activities, surfing, beach culture
- Natural Encounters... reef, rainforest, flora and fauna
- Adventure... outback, theme parks, wildlife parks, adventure activities, sailing, diving

Tourism Queensland is the custodian of the Queensland brand but there are many stakeholders and 'owners' of the Queensland brand who share the Queensland surname.

Rather than reinvent the iconic 'Q' logo, which has high recall in the marketplace, the Queensland logo has been updated to make it more contemporary and signal the start of a new era of tourism marketing in Queensland. Drawing inspiration from the brilliance of natural light, the stylised representation of the Queensland sun has been modernised and infused with vibrant colours to present Queensland as positive, outgoing and carefree.

Strategic Direction

Toward Q2: Tomorrow's Queensland outlines the Queensland Government's 2020 vision for Queensland with targets that address current and future challenges.

Tourism Queensland's strategic direction aligns with the Queensland Government's Toward Q2 target:

"Strong – Queensland is Australia's strongest economy, with infrastructure that anticipates growth"

Tourism Queensland – Corporate Plan (2008-2012)

TQ is the lead creative organisation for tourism in Queensland and a global leader in destination management.

TQ is a statutory body under the Statutory Bodies Financial Arrangements Act 1982 and the Financial Accountability Act 2009.

Tourism Queensland's primary goals are to:

- increase leisure expenditure and share for Queensland
- grow leisure expenditure to each of Queensland's destinations
- increase the value of tourism to Queensland
- maximise sustainable tourism growth for the social and environmental benefit of all Queenslanders.

Tourism Queensland (TQ) focuses on leisure visitors from international, interstate and intrastate markets.

Our primary responsibility, as outlined in the Tourism Queensland Act 1979, is to facilitate the promotion, marketing and development of tourism to and within Queensland. Our functions are:

- To facilitate the promotion and marketing, domestically and internationally, of tourism to and within Queensland
- To facilitate the development of the tourist and travel industry
- To facilitate the making of tourism and travel arrangements
- To facilitate the provision of tourism and travel information services
- To prepare a State tourist and industry strategic marketing plan in extensive consultation with the tourist industry, the general community and appropriate government departments.

40 : Planning and Policy Context

Toward Q2

Tomorrow's Queensland outlines the Queensland Government's 2020 vision for Queensland with targets that address current and future challenges.4 Tourism Queensland's corporate plan aligns with the Toward Q2 target 'Strong - Queensland is Australia's strongest economy, with infrastructure that anticipates growth' and contributes to the Toward Q2 commitment to create 100,000 jobs.

The Queensland government's long-term vision for the tourism industry is outlined in the ten-year Queensland Tourism Strategy 2006-2016 (QTS). The QTS aligns with the broader objectives of the National Long-Term Tourism Strategy5, a long-term tourism policy framework to position the Australian tourism industry as a sustainable and economically vibrant industry.

Tourism Queensland is the lead agency for the majority of the actions identified in the QTS and corporate goals are guided by the goals in the QTS. Tourism Queensland delivers on the actions for which we are responsible as outlined in the Tourism Action Plan to 2012, recognising the extraordinary conditions faced by tourism operators.

Tourism Queensland's corporate plan also aligns with the Tourism Queensland Act 1979. Other State and Commonwealth policies also influence the framework within which Tourism Queensland operates.

Tourism Challenges

Capitalising on Queensland's global reputation as a must see part of an Australian holiday and expanding the consumers' knowledge of destinations within Queensland

» Facilitating the investment in destination development and tourism related infrastructure that meets the needs of the consumers and the growing Queensland population

» Increased competition from international destinations for Australia

» Minimising the impact on Queensland tourism of adverse changes to economic and business operating environments

Actions

» *We take a global approach to tourism marketing and destination development for all of Queensland*

» *We work in partnership with the Queensland tourism industry, with our domestic and overseas tourism partners, and with our Queensland Government stakeholders*

» *Consumers' travel needs are central to all our activity*

» *We are the destination management experts with specialist knowledge to guide and inform the Queensland tourism industry*

Stakeholders and Partners

» The Queensland tourism industry

» Interstate and international tourism partners

» Queensland Tourism Industry Council

» Sectoral associations

» Regional Tourism Organisations

» Tourism Australia

» Airlines and airports

» Government Departments

Tourism Queensland works with the Department of Employment, Economic Development and Innovation in delivering the Queensland Government's tourism policy.

The Queensland tourism industry comprises some 115,000 tourism related businesses; the majority of these are small businesses, with 92% employing less than 20 staff.

Tourism Queensland Focus

Tourism Queensland maintains a network of international and zone offices and works closely with Queensland's regional tourism organisations, other government agencies, industry and the community to:

- Provide industry leadership to ensure the on-going development of a strong and sustainable tourism industry in Queensland, including programs focused on sustainable practices, and planning for future tourism business, product and investment opportunities
- Deliver effective tourism marketing to grow leisure visitation, length of stay and expenditure in all of the state's destinations particularly for the benefit of Queensland's economy and job creation
- Further develop tourism destinations by identifying new and enhanced tourism experiences and products

Global Marketing

Queensland is recognised as the quintessential Australian holiday experience

Leverage events to drive visitor expenditure and dispersal

- Manage content and information databases that support marketing and development activity
- Implement global marketing activity to drive visitor expenditure and dispersal

International

Queensland is recognised as the quintessential Australian holiday experience

Undertake campaign activity to increase sales

- Increase depth of knowledge and desirability of the Queensland experience with the Experience Seekers segment

Interstate

Queensland is the number one holiday destination for Social Fun-seekers

Undertake campaign activity to increase sales

- Increase depth of knowledge and desirability of the Queensland experience with the Social Fun-seekers segment
- Increase depth of knowledge and desirability of the Queensland experience with the Active Explorers segment

Intrastate

Queensland is the number one holiday destination for Connectors

- Undertake campaign activity to increase sales
- Increase depth of knowledge and desirability of the Queensland experience with the Connectors segment

Industry Development

The Queensland tourism industry is progressive, innovative, agile and sustainable

Implement industry development programs to improve market readiness of the Queensland industry at a regional level

- Identify new opportunities and set direction to drive visitor expenditure and dispersal

Industry Leadership

Tourism Queensland is the creative leader that stands above the pack

Communicate tourism opportunities, trends, risks and Tourism Queensland's shared direction to stakeholders and industry

- Manage Tourism Queensland's government relationships to meet agreed expectations

Tourism Queensland Operations

Tourism Queensland operates as a knowledge and performance-driven organisation

Attract and retain specialist knowledge

- Arm Tourism Queensland and industry with insights to inform business decisions
- Deliver efficient Tourism Queensland systems and processes
- Manage government revenue and grant payments to other organisations

Measurables

The Corporate Plan directs Tourism Queensland's annual business plan. Our performance against the annual business plan is evaluated and monitored by the Tourism Queensland Board, and reported in our annual report.

Tourism Queensland is currently working with Queensland Treasury, Queensland Treasury Corporation and the Department of Employment, Economic Development and Innovation to refine its marketing performance indicators, as outlined in the Tourism Action Plan to 2012. Once complete, the Corporate Plan will be updated.

Extensive quantitative research has identified a number of target consumer segments within the domestic and international markets, which allow us to align our activities with the consumers' core holiday needs.

Tourism Queensland's target consumer internationally is the global Experience Seeker. Experience Seekers are long-haul travellers who are less affected by the traditional barriers to travel of distance, time and cost.

Domestically, Tourism Queensland targets three distinct consumer segments: Social Fun-seekers and Connectors are the primary target, and Active Explorers are the secondary target.

For Social Fun-seekers the essence of a holiday is having a fun time. While they do a lot of different activities, it is sharing the experience with friends and other holidaymakers that makes' the difference.

For Connectors, holidays are a chance to connect with the people they care most about. They will often compromise their own preferences in terms of activities to ensure everyone has a good time.

For Active Explorers, holidays are about pushing boundaries and challenging themselves via physical activity. They enjoy the company of others, but their focus is on exploring the extremes of their physical environment and themselves. It's about feeling alive.

41 : Fitzroy Snapshot

Visitors to Central Queensland

	Expenditure	Visitors	Nights	Average stay	Average trip expenditure	Average nightly expenditure
	$ million	'000	'000	Nights	$	$
Domestic day	194	1,357	-	-	143	-
Domestic overnight	517	1,180	4,830	4	438	107
International	40	108	781	7	371	52

Domestic overnight visitor profile

	Visitors	Nights	Share of visits	Share of nights	Average stay
	'000	'000	%	%	Nights
Top 3 SLAs visited*					
Rockhampton (R) - Rockhampton	453	1,071	38	22	2
Gladstone (R) - Gladstone	177	986	15	20	6
Central Highlands (R) - Emerald	160	564	14	12	4
Purpose of visit					
Holiday	428	2,613	36	54	6
Visiting friends/relatives	362	1,130	31	23	3
Business	305	812	26	17	3
Other	79	212	7	4	3
Top 3 accommodation					
Property of friends or relatives	402	1,696	34	35	4
Caravan or camping	233	1,415	20	29	6
Hotel, motel, serviced apartment	401	877	34	18	2
Transport					
Air	160	676	14	14	4
Drive	962	3,514	82	73	4
Other	50	577	4	12	12
Experiences					
Culture and heritage	66	-	6	-	-
Nature based	124	-	11	-	-
Indigenous	np	-	np	-	-
Food and wine	517	-	44	-	-
Top 3 information sources					
Internet	364	1,318	31	27	4
Previous visit	212	1,060	18	22	5
Friends or relatives	113	715	10	15	6
Top 3 visitor origins					
Qld	1,001	3,235	85	67	3
NSW	100	823	8	17	8
Vic	50	590	4	12	12

	Visitors	Nights	Share of visits	Share of nights	Average stay
	'000	'000	%	%	Nights
Travel party type					
Travelling alone	314	967	27	20	3
Adult couple	257	1,270	22	26	5
Family group	290	1,102	25	23	4
Friends or relatives	217	1,184	18	25	5
Business associates	np	np	np	np	np
Other	np	np	np	np	np
Total domestic overnight	**1,180**	**4,830**	**100**	**100**	**4**

International visitor profile

	Visitors	Nights	Share of visits	Share of nights	Average stay
	'000	'000	%	%	Nights
Top 3 SLAs visited*					
Rockhampton (R) - Rockhampton	47	333	43	43	7
Gladstone (R) - Miriam Vale	34	104	31	13	3
Rockhampton (R) - Livingstone Pt B	15	61	14	8	4
Purpose of visit					
Holiday	91	416	84	53	5
Visiting friends/relatives	11	231	11	30	20
Business	6	61	5	8	11
Education	np	np	np	np	np
Other	np	np	np	np	np
Top 3 accommodation					
Property of friends or relatives	14	246	13	31	17
Rented house, apartment, flat or unit	3	162	2	21	62
Hotel, motel, serviced apartment	34	107	31	14	3
Transport					
Air	18	315	17	40	17
Drive	63	343	58	44	5
Other	35	123	32	16	4
Experiences					
Culture and heritage	80	-	73	-	-
Nature based	97	-	89	-	-
Indigenous	43	-	40	-	-
Food and wine	101	-	93	-	-
Top 3 information sources					
Internet	67	521	62	67	8
Friends or relatives	44	326	40	42	7
Travel book or guide	33	96	31	12	3

	Visitors	Nights	Share of visits	Share of nights	Average stay
	'000	'000	%	%	Nights
Top 3 visitor origins					
United Kingdom	23	127	21	16	6
Germany	15	56	14	7	4
Other Europe	11	41	10	5	4
Travel party type					
Travelling alone	49	523	45	67	11
Adult couple	32	137	30	18	4
Family group	8	34	7	4	4
Friends or relatives	18	71	16	9	4
Business associates	np	np	np	np	np
Total international	**108**	**781**	**100**	**100**	**7**
Total all visitors (including day visitors)	**2,645**	**5,611**	**100**	**100**	**2**

Visitor expenditure 2010/11

Domestic day visitors						
Expenditure by item						
Food and drink	**Transport fares and packages**	**Fuel**	**Shopping**	**Entertain-ment**	**Other**	**Total $**
34	8	58	91	1	2	194

Domestic overnight visitors	
Expenditure by item	
	$ million
Accommodation	140
Food and drink	136
Airfares	45
Other transport fares	21
Fuel	85
Shopping	28
Entertainment	20
Other	8
Packages	10
Total $	517

Destination expenditure by purpose of visit						
	$	**Share of $**	**Visitors**	**Visitor nights**	**$ per visitor**	**$ per night**
	$ million	**%**	**'000**	**'000**	**$**	**$**
Holiday	215	50	428	2,613	503	82
Visiting friends/relatives	90	21	362	1,130	250	80
Business	85	20	305	812	278	104
Other	np	np	np	np	np	np

Destination expenditure by origin (intrastate/interstate)						
	$	**Share of $**	**Visitors**	**Visitor nights**	**$ per visitor**	**$ per night**
	$ million	**%**	**'000**	**'000**	**$**	**$**
Intrastate	324	75	1,001	3,235	323	100
Interstate	106	25	179	1,596	593	66
Total destination $	430	100	1,180	4,830	364	89

International visitors				
Expenditure on accommodation, food and beverages (AFB)				
	Total $	**AFB $**	**Share of AFB $**	**AFB share of region $**
	$ million	**$ million**	**%**	**%**
	40	24	0	59

Tourism businesses 2008/09

Employing businesses					Non-employing businesses	Total businesses
Micro	**Small**	**Medium**	**Large**	**Total employing**		
(1-4 employees)	(5-19 employees)	(20-199 employees)	(200+ employees)		(includes owner/ manager)	
532	535	254	8	1,329	848	2,176

Economic importance of tourism 2007/08

	Economic importance	National ranking	National benchmark
	%	**No.**	**%**
Economic importance of tourism	3.29	49	3.0

Accommodation supply 2010/11

	Establishments	Employees	Occupancy rate	Takings from accomm.
	No.	**No.**	**%**	**$ '000**
Hotels, motels and serviced apartments with 15 or more rooms	106	1,550	60	111,407

42 : Outback Snapshot

Visitors to Outback

	Expenditure	Visitors	Nights	Average stay	Average trip expenditure	Average nightly expenditure
	$ million	'000	'000	Nights	$	$
Domestic day	np	292	-	-	np	-
Domestic overnight	np	310	1,565	5	np	np
International	np	24	194	8	np	np

Domestic overnight visitor profile

	Visitors	Nights	Share of visits	Share of nights	Average stay
	'000	'000	%	%	Nights
Top 3 SLAs visited*					
Longreach (R) - Longreach	147	302	48	19	2
Mount Isa (C)	62	178	20	11	3
Murweh (S)	53	125	17	8	2
Purpose of visit					
Holiday	139	751	45	48	5
Visiting friends/relatives	47	np	15	np	np
Business	104	393	34	25	4
Other	6	np	2	np	np
Top 3 accommodation					
Caravan or camping	123	656	40	42	5
Hotel, motel, serviced apartment	135	261	43	17	2
Property of friends or relatives	np	np	np	np	np
Transport					
Air	44	360	14	23	8
Drive	211	964	68	62	5
Other	np	np	np	np	np
Experiences					
Culture and heritage	78	-	25	-	-
Nature based	np	-	np	-	-
Indigenous	np	-	np	-	-
Food and wine	174	-	56	-	-
Top 3 information sources					
Internet	101	537	33	34	5
Previous visit	np	np	np	np	np
Travel book or brochure	np	np	np	np	np
Top 3 visitor origins					
Qld	216	771	70	49	4
NSW	41	448	13	29	11
Vic	np	np	np	np	np

	Visitors	Nights	Share of visits	Share of nights	Average stay
	'000	'000	%	%	Nights
Travel party type					
Travelling alone	np	np	np	np	np
Adult couple	78	485	25	31	6
Family group	77	335	25	21	4
Friends or relatives	55	336	18	22	6
Business associates	np	np	np	np	np
Other	np	np	np	np	np
Total domestic overnight	**310**	**1,565**	**100**	**100**	**5**

International visitor profile

	Visitors	Nights	Share of visits	Share of nights	Average stay
	'000	'000	%	%	Nights
Top 3 SLAs visited*					
Mount Isa (C)	12	85	49	44	7
Longreach (R) - Longreach	3	8	13	4	2
Murweh (S)	3	12	11	6	5
Purpose of visit					
Holiday	17	107	71	55	6
Visiting friends/relatives	3	35	13	18	11
Business	np	np	np	np	np
Education	np	np	np	np	np
Other	np	np	np	np	np
Top 3 accommodation					
Caravan or camping	11	42	46	22	4
Property of friends or relatives	4	37	15	19	11
Rented house, apartment, flat or unit	np	np	np	np	np
Transport					
Air	4	57	18	30	13
Drive	16	89	68	46	5
Other	4	48	15	25	13
Experiences					
Culture and heritage	16	-	69	-	-
Nature based	18	-	77	-	-
Indigenous	10	-	41	-	-
Food and wine	22	-	92	-	-
Top 3 information sources					
Internet	14	90	58	46	7
Friends or relatives	8	67	34	35	8
Travel book or guide	6	46	25	23	8

	Visitors	Nights	Share of visits	Share of nights	Average stay
	'000	'000	%	%	Nights
Top 3 visitor origins					
New Zealand	5	39	22	20	7
United Kingdom	4	38	17	20	9
Germany	3	30	13	15	10
Travel party type					
Travelling alone	12	126	50	65	11
Adult couple	7	40	31	20	5
Family group	np	np	np	np	np
Friends or relatives	2	6	9	3	3
Business associates	np	np	np	np	np
Total international	**24**	**194**	**100**	**100**	**8**
Total all visitors (including day visitors)	**626**	**1,759**	**100**	**100**	**3**

Tourism businesses 2008/09

Employing businesses					Non-employing businesses	Total businesses
Micro	**Small**	**Medium**	**Large**	**Total employing**		
(1-4 employees)	(5-19 employees)	(20-199 employees)	(200+ employees)		(includes owner/ manager)	
198	209	74	4	484	289	773

Economic importance of tourism 2007/08

	Economic importance	National ranking	National benchmark
	%	No.	%
Economic importance of tourism	6.49	17	3.0

Accommodation supply 2010/11

	Establishments	Employees	Occupancy rate	Takings from accomm.
	No.	No.	%	$ '000
Hotels, motels and serviced apartments with 15 or more rooms	41	406	55	26,663

43 : Understanding the Connector Market

Australian Government
Department of Resources, Energy and Tourism
Tourism Research Australia

Tourism Queensland

Research conducted via focus groups and an online survey with Connectors within 400km of Central Queensland and the Southern Great Barrier Reef plus a boost sample of Brisbane Connectors. For further information please contact: Research@tq.com.au

The Overlap between Connectors' holiday needs and wants and what they perceive Central Queensland offers:

Activities and attractions preferred by Connectors on their ideal holiday include: beaches, rainforests, shopping, general sightseeing, markets, activities and attractions for children and day trips. Generally speaking, Connectors envisage that you can currently do these things in Central Queensland.

Holiday experiences sought by Connectors often incorporate: access to natural water, great natural attractions, safety and a great holiday atmosphere. They may also incorporate: exploring the countryside, discovering nature, water based activities, romantic getaways and having locally grown produce. Connectors already associate Central Queensland with these holiday experiences.

Core drivers behind Connectors' ideal holiday include to: rest, relax, unwind, de-stress, have fun, explore and have new experiences. Typically, Connectors think they would be able to achieve this during a trip to Central Queensland.

The Gap between Connectors' holiday needs and wants and what they perceive Central Queensland offers:

Other activities and attractions preferred by Connectors perceived to be unavailable on a trip to Central Queensland include: zoos, wildlife parks and festivals.

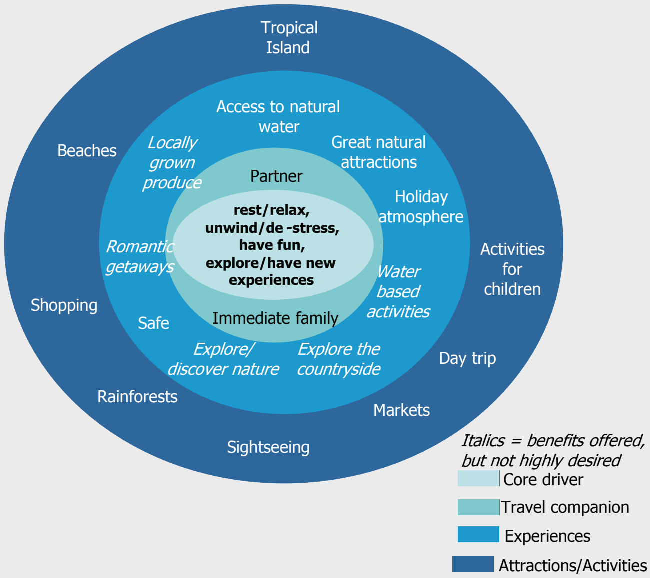
Other holiday experiences Connectors look for include: value for money, easy access, something for the kids and to escape the crowds (It is noteworthy that Connectors often associate value with an ability to exceed their expectations, opposed to just the dollar value). These experiences are not strongly associated with Central Queensland at present.

Another core driver behind Connectors' ideal holiday is to leave the cares of the world behind. This need is not strongly linked with Central Queensland.

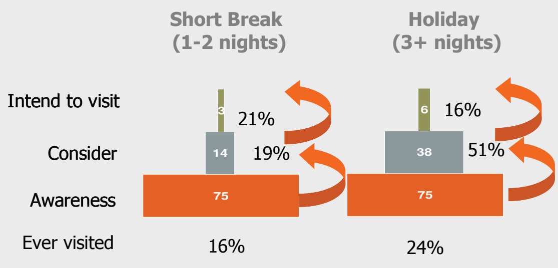
Current synopsis

Three in four Connectors are aware of Central Queensland as a destination for taking either a short break or a holiday. However, they are more likely to "consider" Central Queensland a place to visit for a holiday (three nights or more) than for a shorter break.

This diagram summarises how Connectors' ideal holiday needs and wants overlap with what they perceive Central Queensland offers. Highlighting these attributes can help motivate Connectors to "consider" or "intend" to take a trip to region.



Conversion of the model below is key to increasing visitation by Connectors to Central Queensland. This involves motivating Connectors who are aware of Central Queensland to "consider" or "intend" to take a trip there. To assist with this endeavour the research has focussed on how the region fits with Connector's ideal holiday.



Awareness is a foundation measure

Understanding the Connector Market:
How does Central Queensland and the Southern Great Barrier Reef fit with Connectors' ideal domestic holiday?

Research conducted via focus groups and an online survey with Connectors within 400km of Central Queensland and the Southern Great Barrier Reef plus a boost sample of Brisbane Connectors. For further information please contact: Research@tq.com.au

Considerations for the future…

Central Queensland is well positioned as a holiday destination. Most Connectors are aware of Central Queensland, and for most of those aware of the destination, it is in their holiday consideration set. The challenge is to convert Connectors who would consider visiting the region to actually take a trip there.

Three quarters of Connectors indicated that they are aware of Central Queensland, yet knowledge of specific places and attractions is low. This includes many with high appeal such as the Capricorn Caves, Sapphire Gem Fields, Lady Musgrave Island, Lady Elliot Island, Heron Island, Cania Gorge and Carnarvon Gorge.

Connectors perceive that Central Queensland has much to offer in terms of attractions and activities due to the large geographic region it encompasses. Therefore Connectors also tend to view the region as being more suitable for longer trips, opposed to short breaks. However, it lacks a compelling holiday proposition (experiences) which would give Connectors a stronger emotional reason to visit.

Identifying and promoting Central Queensland's unique selling points may help identify a compelling holiday proposition. While Central Queensland offers experiences that are highly appealing to Connectors such as beach and nature based experiences, perceptions of distance (size of region) and being seen as having a similar offering to home are issues to be overcome.

Key hurdles include overcoming consumers perceptions of the region as being too large and lacking in comfortable accommodation options in inland localities. Therefore communications about Central Queensland need to:

- Recommend destinations to use as a base from which daytrips could be taken;
- Reinforce the short distance between towns and attractions; and
- Raise awareness of more comfortable accommodation options available inland, those beyond camping and caravanning.

In communications reinforce where Central Queensland matches Connector's ideal holiday

44 : Queensland's Outback Central West Visitor Profile and Satisfation Report

Introduction

The Queensland's Outback Central West (QOCW) Visitor Profile and Satisfaction (VPS) project was completed as part of the Destination Visitor Survey Program (DVS) run by Tourism Research Australia (TRA), within the Department of Resources, Energy and Tourism. The results from VPS studies are useful at all levels of destination management including planning, development and marketing.

This project was undertaken by TRA in partnership with Tourism Queensland to gain a better understanding of visitors to the region and improve the market readiness of the industry within the QOCW region. Additionally, this research will provide more reliable and detailed information on the region, to feed directly into industry development decisions and investment initiatives. More specific objectives of the research included understanding issues such as quality of tourism product and experiences, motivations and expectations of visitors, travel planning habits, Indigenous experiences, and the use of commercial and free caravan or camping facilities.

The results for QOCW were positive but showed that there were issues that should be addressed. The study showed that many visitors lacked enough knowledge of the region to take full advantage of what was on offer. While many visitors were aware of the major man-made attractions in the region, they had not allowed enough time to experience what the region offered.

Method

This VPS project comprised two phases:

1. The first phase was the quantitative VPS survey which aimed to provide information on the profile and satisfaction of visitors to the region. A total of 474 visitors were recruited for the survey during their visit to the region in September and October 2010.

2. The second phase comprised a series of qualitative interviews with respondents from the initial VPS survey to expand on the initial findings. These interviews were conducted in November 2010 and involved six focus groups with visitors from Melbourne, Brisbane, Sunshine Coast, Sydney and Geelong, and ten in-depth telephone interviews with visitors from regional areas of Queensland, New South Wales and Victoria.

This document is a summary of the results and insights from both project phases. All results discussed are from the quantitative survey phase unless specifically noted as qualitative phase results. The detailed reports from each phase are available from TRA upon request.

Since 2006, 69 VPS projects have been completed in Australian regional tourist destinations. Data from these projects have been collated to establish the VPS Benchmark Database.

Australian Government
Department of Resources, Energy and Tourism
Tourism Research Australia

TRA TOURISM RESEARCH AUSTRALIA

Benchmarks are the average of all (unweighted) VPS destination projects with at least 50 respondents. Some destinations are surveyed during different times of the year in order to encompass the broadest range of visitors. In this event, only the most recent research for the destination is included. Comparisons against VPS benchmarks are made throughout this summary.

Visitor and trip characteristics

The demographic visitor profile for QOCW mirrors that of many Australian outback tourism regions, with a key exception being NT outback regions which attract a significant proportion of international visitors. Outback regions are also interesting because they attract visitors with similar profiles, unlike many other destinations in Australia which have much more diversity in their visitor profiles. The results of the QOCW VPS showed:

- Visitation was dominated by older travellers — about eight in ten visitors were aged over 54 years
- Most of the older visitors were retired, with two thirds of visitors in the older non-working life stage — this was a much higher proportion than the VPS benchmark
- Just over half the visitors reported annual household incomes of less than $52,000 which is a considerably higher proportion than the VPS benchmark
- Nearly seven in ten visitors travelled as a couple — also a much higher proportion than the VPS benchmark
- About six in ten visitors were from interstate — in QOCW, these visitors were mainly from Victoria and New South Wales and most of those were from regional areas
- About nine in ten visitors were on trips of more than seven nights (the median trip length was 35 nights) and most spent at least four nights in QOCW (median was six nights)
- Half the visitors were first-time visitors to the region — a considerably higher proportion than the VPS benchmark
- Nearly nine in ten visitors were self-drive visitors to the region.

The profile confirmed that the majority of visitors to the region were older Australians on long haul self-drive trips. However, the qualitative research found that travellers do vary in how they perceived the region and in their level of experience with it.

An interesting distinction made between visitors in the qualitative phase was based on visitors' level of experience with the region and, in particular, a segment of visitors who were relatively inexperienced with the region. This segment had limited expectations and a limited understanding of how QOCW differs to other Australian outback regions. As a result, they largely perceived the region as a thoroughfare or stop-off point on a longer journey to somewhere else. However, once they actually visited QOCW, many discovered its unique qualities and realised it had a lot more to offer as a destination than they had initially thought.

Another way of understanding visitors to Queensland is through Tourism Queensland's domestic market segmentation which divides the domestic market into six segments based on visitor's needs and wants. Each respondent to the quantitative survey was required to choose the segment which they felt best represented them:

- Connectors — choose holidays where they can bond with family and friends
- Self discoverers — choose holidays where they can enrich their mind and nourish their body
- Unwinders — choose holidays where they can reflect and recharge at their own pace
- Active explorers — choose holidays where they can be challenged and feel alive
- Stylish travellers — choose holidays where they can stand out from the crowd, and appreciate and enjoy the finer things in life
- Social fun-seekers — choose holidays where they can share good times with friends, new and old.

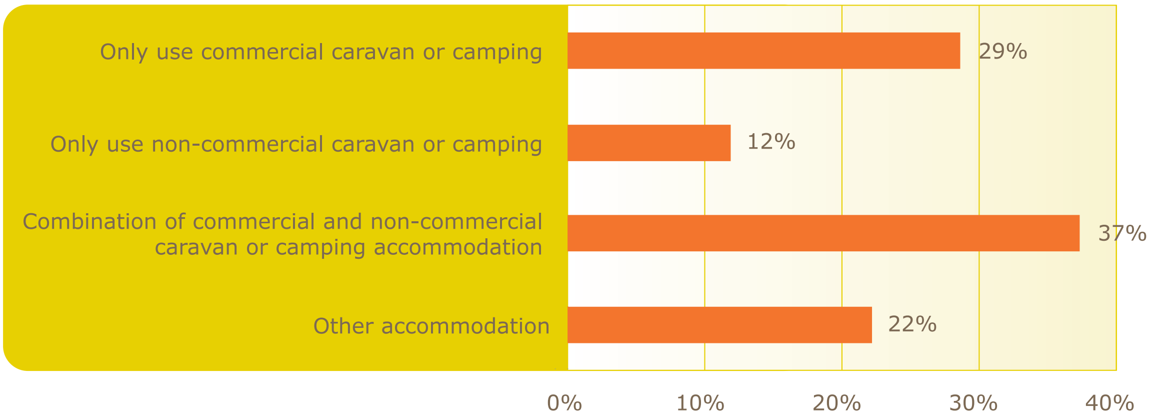
Just over six in ten visitors classified themselves as *Connectors*. A holiday to a *Connector* is all about re-connecting with family and friends through relaxing, unwinding and having fun[1]. Almost two thirds of the *Connectors* in the survey were from interstate, highlighting the importance of this segment in both the interstate and intrastate markets for QOCW. The proportion of *Connectors* was also similar for interstate visitors irrespective of which state they came from. The next most common segments were *Self discoverers* (13%) and *Unwinders* (12%).

[1] See Tourism Research Australia 2010, *Understanding the Connector Market,* TRA, Canberra for more information on the Connector market.

Caravan or camping visitors

As expected, the majority of visitors to the region were self-drive, and three quarters of these were travelling with a caravan or motor home, or were equipped with camping gear. Consequently, the various forms of caravan parks and camping grounds were the most common type of accommodation used in QOCW (just over seven in ten visitors). The chart below shows that the largest proportion of caravan or camping visitors used a combination of both commercial and non-commercial sites. Those who used non-commercial sites exclusively were the smallest proportion.

Accommodation used by caravan or camping visitors in QOCW



Analysis of the expenditure of the various caravan or camping groups (see table below) showed that the highest expenditure per night and total trip expenditure was by visitors who *used a combination of commercial and non-commercial sites*. Furthermore, although visitors who *only used non-commercial sites* spent less per night than other visitors they tended to spend longer in the region, so their total expenditure while in QOCW was comparable to the other caravan or camping groups.

Average expenditure of caravan or camping visitors in QOCW

	Average expenditure per night	Average expenditure per trip
Used a combination of commercial and non-commercial sites	$90	$560
Only used commercial sites	$80	$425
Only used non-commercial sites	$60	$415

Key motivations for using non-commercial sites have more to do with the experience and itinerary considerations than saving money; a possible explanation for the comparable total trip expenditure by visitors who *only used non-commercial sites* to the other caravan or camping groups. The quantitative results showed there were a large number of experiences expected and attributes that were important to visitors who *only used non-commercial sites* compared with other visitors to the region. Of the 20 experiences listed, 13 were expected by these visitors and of the 21 attributes, 13 were very important to these visitors — both larger numbers than for other visitors.

- Experiences expected ranged from natural and cultural attractions and events to meeting the locals and escaping the crowds.
- Attributes that were important ranged from functional aspects like availability of free camping, waste dumping facilities, toilets and information services through to the local atmosphere.

The qualitative results also support these findings. In the interviews, visitors cited a range of reasons for and against staying in commercial or non-commercial sites. The facilities, entertainment and social interaction were all seen as positive aspects to staying in commercial sites; while a lack of privacy, noise and expense were seen as potential drawbacks. Privacy, and the ability to have a 'real' outback experience (complete with camp fires, star gazing and isolation or quietness), were the perceived positives to staying in non-commercial sites; while a lack of facilities, safety issues and a lack of policing of free sites emerged as the negatives.

Motivations and satisfaction with QOCW

QOCW offers a large number of man-made and natural attractions including cultural and heritage attractions, outback pubs, dinosaurs/fossils and National Parks. One quarter of visitors in the quantitative survey stated that the most important reason they chose to go to QOCW was to visit one or more specific attractions, with the next most important reason being that it was a convenient stopover point (11%). Positively, satisfaction with the region's attractions scored well above the VPS benchmark; almost two thirds of respondents said they were very satisfied with the attractions. Open ended comments also reflected this with many respondents commenting on the excellent value of the attractions.

The importance of attractions to the region's identity was further demonstrated by the experiences that visitors expected to have in the region. The most commonly expected experiences included *experiencing our nation's/Australia's history* (89%) and *discovering or learning something new* (84%); each well above VPS benchmarks in terms of the proportion of visitors expecting them (53% and 60% respectively). Both these experiences were rated very highly for being better than expected (69% and 68% respectively) and were again well above VPS benchmarks (48% and 49% respectively).

Indigenous experiences are often associated with outback Australia, although both the quantitative and qualitative phases revealed this was not the case for QOCW, as only 23% of the visitors surveyed expected this experience.

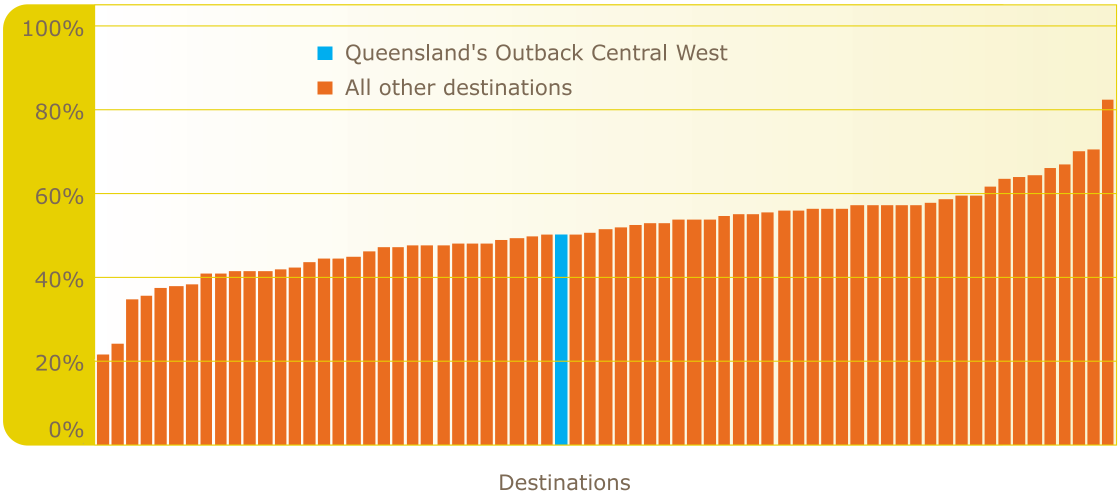
There were a number of other experiences and functional aspects of the region that scored well above VPS benchmarks in terms of exceeding expectations and satisfaction:

- Tour around and explore (exceeded expectations for 55% compared with a benchmark of 51%)
- An adventure (51% compared with 47%)
- Personal safety and security (68% were very satisfied compared with a benchmark of 56%)
- Friendliness of the locals (67% compared with 55%)
- Friendly service (62% compared with 56%)
- Local atmosphere (61% compared with 53%)
- Variety of things to see and do (61% compared with 50%)
- Information services in the region (59% compared with 48%)
- Public toilets (42% compared with 38%).

In addition, QOCW scored above the VPS benchmarks for visitors being very likely to recommend the region to others. A couple of other themes with a high degree of satisfaction were evident from the open ended comments of visitors in the quantitative survey. A large number of visitors mentioned how pleased they were with the entertainment/information provided by caravan parks — the extra effort being made by park operators seemed to be appreciated and left a lasting and positive impression on many customers. Another frequently mentioned area of satisfaction was with the towns themselves — this was mostly expressed as the pride that locals have in their towns, the cleanliness of the towns and the history evident in them.

In terms of overall satisfaction, 50% of visitors stated that they were very satisfied overall with their visit to QOCW; one percentage point below the VPS benchmark of 51%. The chart below shows the QOCW ranking against all other VPS destinations.

Overall satisfaction: Proportion of visitors very satisfied



Barriers and areas for improvement

Given the list of experiences and functional aspects that scored above VPS benchmarks, it was surprising that the overall satisfaction with the region was not higher.

However, the quantitative survey highlighted some areas of lower satisfaction, such as roads (29% very satisfied) which scored below the VPS benchmark (40%). This was also an attribute that was very important (40%) to visitors relative to the VPS benchmark (23%). Open ended responses indicated that although visitors were happy with the quality of the roads, there were issues around the presence of road kill and safety concerns in relation to dealing with road trains, especially on narrow roads. QOCW recorded lower satisfaction scores with roads than most other outback destinations in the VPS database. Satisfaction with food and beverage (38%) and shopping (25%) also scored below the VPS benchmarks (44% and 30% respectively).

There were three experiences that were expected by the majority of visitors but scored on or below VPS benchmarks in terms of exceeding expectations. Although the scores were only slightly below the VPS benchmarks they were all experiences which were specific needs of *Connectors*:

- Relaxation and rejuvenation (expected by 77%; exceeded expectations of 44% which is just below the VPS benchmark)
- Nature based experiences (expected by 75%; exceeded expectations of 48% which is just below the VPS benchmark)
- A place to spend quality time with partner/family/friends (expected by 59%; exceeded expectations of 46% which is well below the VPS benchmark).

However, the slightly negative feedback on these aspects from visitors may not be significant enough to explain the average overall satisfaction score. The qualitative phase put forward some broader reasoning for this result that was supported by the quantitative results.

The quantitative survey showed that QOCW consistently delivered upon and, in some cases, exceeded expectations regarding the functional aspects of a trip. Despite this result, visitors would also need to have had a number of memorable experiences, or experiences unique to the destination to be very satisfied with their time in the region.

As a group, visitors experienced a wide range of attractions in different towns, with a number of attractions consistently rated as highlights on their trip. Individually, however, visitors only tended to experience a few attractions on a single trip. This was largely because they had not allowed enough time to see more attractions or because they were not aware of them (either at all, or in time to visit during their trip).

Interaction with the people who live or work in the region can also drive higher levels of satisfaction with the region. The local characters — with their personal anecdotes, insider knowledge and unique Outback charm — appear to ignite visitors' interest in exploring the region. Visitors and locals were most likely to interact at attractions; Visitor Information Centres (VICs); caravan parks (e.g. the entertainment); and at local businesses (e.g. a pub or cafe). For the majority, the best encounters tended to happen at attractions and caravan parks, however, due to variation in the level of knowledge and enthusiasm of guides at attractions and given the entertainment at caravan parks can be seasonal or infrequent, visitors didn't always have the opportunity to experience this interaction.

Consequently, the average satisfaction levels for the region were quite likely due to visitors simply missing out on many of the unique attractions and local charm that QOCW has to offer.

Trip planning and booking

It is, therefore, important that the region engages travellers; firstly when they are planning their trip to (or through) the region, so that they plan to travel there at the 'right' time and allow enough time to experience a lot of what is on offer; and secondly, when they are in the region, so that their time is well spent and is as enjoyable or fulfilling as possible.

Both the quantitative and qualitative research found that visitors made use of a range of information and booking resources. The major sources consulted were VICs, guidebooks, travel publications and the 'bush telegraph'. The internet was also a major source but the qualitative research indicated that this was primarily for pre-trip research.

Travel publications, such as *Camps Australia Wide* and the Royal Automobile Club of Queensland's (RACQ) guides were typically used by all travellers for information on routes and caravan/camping sites. Those with less experience of the region relied on these publications more heavily; those with more experience typically used them as a back up to supplement existing knowledge.

VICs were a key information and booking resource for travellers who were interested in finding out more about the region, and this included both the less experienced and the experienced visitors. The VICs can, therefore, play a significant role in 'selling' the region and individual towns, by ensuring visitors get the most out of their overall experience of the region and 'planting seeds' to entice visitors to come back to the region or to explore more areas within the region.

Tourist guidebooks were also used to supplement the information gained from the VICs.

Recommendations

A number of recommendations were developed for further consideration based on the findings of the research:

1. Product and service delivery

Encourage staff in VICs as well as tourism operators to provide information beyond their immediate area or town, which will enable visitors to plan their current and potential return trip. This will require equipping VICs and tourism operators with information on all facets of the in-region experience, including attractions, tours, road conditions, dealing with road trains, weather, bookings/vacancies, dining and accommodation options and schedule of entertainment and events.

2. Product development and diversification

Continue to encourage local operators to develop their products through diversification which enhances the visitor experience. Consider developing product around Indigenous history and its role in Australia's pioneering history.

3. A balance between the visitor experience and sustainability

Given the importance of the non-commercial caravan or campers to the region, ensure there are facilities available for these visitors to have a real outback experience in the region without damaging the natural environment.

4. Stimulating consumer demand

Promote the region more extensively to prospective or first-time visitors, so that they see it as a destination from the outset. In promoting the region, position it in terms of the overall experience you can have there, rather than lead with specific attractions:

- leading with attractions can narrow perceptions of what the region offers
- attractions should support, rather than represent, the region.

The positioning communicated should highlight the unique experience on offer relative to other outback regions and other Queensland or Australian touring destinations:

- Consider positioning the region around pioneering heritage and rural life
- Optimise internet search terms to enhance perceptions of Queensland's Outback as a region, and therefore a destination, for first-time travellers pre-planning their trip
- Use visitor testimonials to help promote the region (e.g. leverage the 'bush telegraph') to those planning their trip, both online and offline.

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Image: Australian Stockman's Hall of Fame
Courtesy of Tourism Queensland

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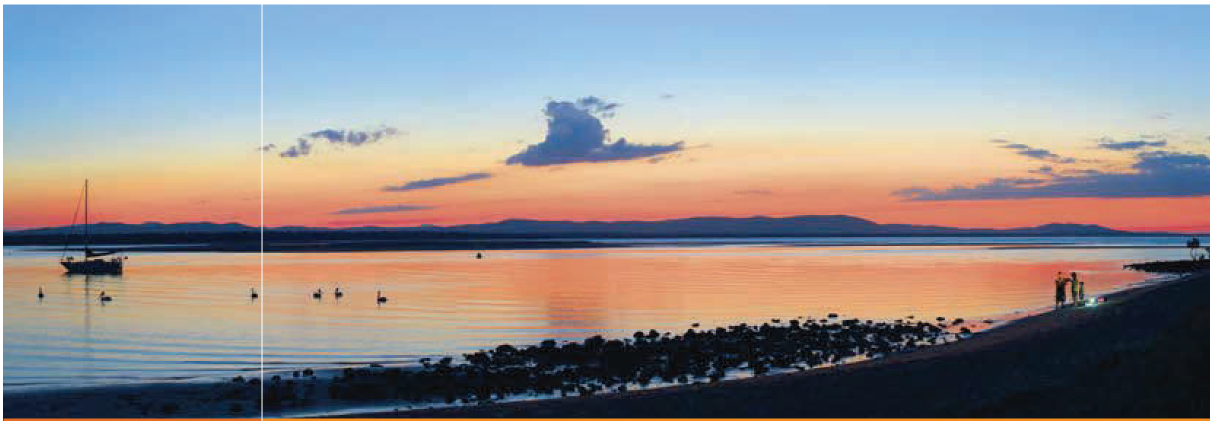
45 : Central Queensland Tourism Opportunity Plan



Central Queensland
Tourism Opportunity Plan

2 0 0 9 – 2 0 1 9

Emu Park, Capricorn Coast

Purpose

The purpose of this Tourism Opportunity Plan (TOP) is to provide direction for the sustainable development of tourism in the Central Queensland Region over the next ten years to 2019.

The TOP aims to:

- Identify new and upgraded tourism product that meets future visitor expectations and demands;
- Identify the need for new investment in infrastructure that supports the ongoing development of tourism;
- Provide relevant research based information on tourism supply and demand; and
- Provide an agreed focus and mechanisms for engagement with the tourism industry, infrastructure providers and private investors.

The audience of the report includes Local, State and Federal Government agencies, regional economic development agencies, regional and local tourism organisations, investors and developers and tourism industry operators.

The development of the TOP has been based on extensive research as well as consultation with a diverse range of regional and external stakeholders including government agencies, tourism industry, tourism stakeholders, developers and investors. Over 100 stakeholders were consulted throughout this project, from survey consultation through to one-on-one interviews, forums and workshops.

This TOP does not purport to canvass all possible projects for the region. Recommendations made in this TOP were developed through an assessment of projects based on the following agreed set of criteria:

1. Is the **product unique** or provide a **competitive advantage** for the region?
2. Does the project meet the **needs of growth target markets**?
3. Is the product/project **demand driven**?
4. Is the project **aligned with Local, State or Federal Government's priorities** and likely to gain support from the decision-makers?
5. Is the project **aligned with the vision for the region and community aspirations**?

Central Queensland in 2019

The Central Queensland Region encompasses the two tourism regions of Capricorn and Gladstone and is made up of the four Local Government Areas – Rockhampton, Gladstone, Central Highlands and Banana. Tourism in Central Queensland is a growing part of a large regional economy, one which is currently primarily driven by the resource and mining industry boom. In the year ended December 2007, domestic overnight leisure visitors spent over $507 million in the Fitzroy Region, with tourism accounting for 10.9% of all employment (8,000 full-time equivalent positions) in the Capricornia Region in the 2007-08 year.

Over the next 10 years, Central Queensland's regional economy, population growth and investment will continue to be driven by the mining, mineral resources and energy industries. While population growth in the region is not expected to grow as rapidly as the State average, the infrastructure requirements to meet the needs of industry will be substantial. There will be increasing pressure on transport infrastructure, community resources and utilities in these areas in order to meet growing demand.

Central Queensland Tourism Opportunity Plan Vision

From the stakeholder consultation process, a number of common themes can be identified as core elements of a vision for the future growth and development of tourism in the Central Queensland region. The following ***development goals*** were used as the basis for the vision for tourism opportunities in Central Queensland to 2019.

The types of development desired in Central Queensland are projects that:

- Contribute to a positive image of the area as a **destination in its own right** (not just a stopover) for local and international visitors and business people;
- Recognise and highlight the internationally and nationally s**ignificant natural and heritage assets**;
- Successfully **blend nature based and industrial tourism** to create a spectrum of experiences that encourage an increased length of stay;

- Protect and enhance the **lifestyle** of residents in Central Queensland;
- **Target a specific market** that appreciates the regions unique character and successfully provide infrastructure suitable to their needs;
- Products that match the natural assets of the region and provide **immersive experiences** where you can get-away from the crowds; and
- Support a **profitable and sustainable** tourism industry.

The recommended Central Queensland TOP Vision is:

"Encourage profitable and sustainable development that immerses the ideal visitor in experiences that are sensitive to the unique natural, cultural and lifestyle features of Central Queensland"

Target Markets

Domestic Consumer Segmentation

Since the Central Queensland Destination Management Plans (DMPs) were published, Tourism Queensland has undertaken a new approach to identifying domestic target markets, based on consumer segmentation. The segmentation is a result of research of some 6,000 Australian consumers, looking to understand the emotional drivers for their ideal holiday experience. Based on the results of this research the consumer group best suited to Central Queensland is the 'Connectors'. This group make up 32% of the travelling domestic population including a wide range of lifecycle segments from families to empty nest and retired couples.

Connectors see holidays as a chance to connect with the people they care most about. They will often compromise their own preferences in terms of activities to ensure everyone has a good time. It's about what is real and what's really important; (Tourism Queensland, 2008[1])

The Central Queensland DMPs (2007) identify the core target market segments that are expected to provide the greatest potential for growth of tourism in the region. These target markets align well with the 'Connectors' market segment, however it is important to note that 'Connectors' needs go beyond that of a lifestage and look for experiences that bring the group together. For the purpose of the TOP the following target markets are the primary focus for product development and marketing activities from 2007 – 2010 and should also provide the focus for the TOP in recommendations made on infrastructure and investments priorities.

Core Target Markets

- Couples and families 35 years and over from Brisbane and South East Queensland
- Young parents from Regional Queensland (excluding South East Queensland)
- Couples and families 35 years and over from Northern New South Wales

Special interest and developing markets include long-haul self-drive, visiting friends and relatives, fishing, fly/drive, geo tourism, golf tourism, adventure/nature-based, education, marine, sporting, business and events. A growing target market for the region will be international visitors including Central Queensland as part of a larger coastal itinerary (Cairns to Brisbane) travelling in hire cars or on long-distance buses.

Target Market Needs

In addition to the 'Connector' market regional stakeholders identified the following emotional needs that a Central Queensland holiday will meet for the visitor in 2020.

- **"Escape"** Escape to Reality – Real Adventure, Real Experiences, Real Holidays. From snorkelling the reef, fishing and surfing to gem fossicking, outback cattle stations, scenic gorge country, or touring industrial giants – the experience is real in Central Queensland, not manufactured. You can touch and feel everything about it.
- **"Discovery"** Discovering nature, discovering industry, heritage, culture and discovering self. Experiences of exploring, learning, reconnecting, understanding, reflecting, regenerating, rejuvenating.
- **"Learning/Education"** Learning about the lifestyle of the Central Queensland Region, learning about the industry and job opportunities, learning about nature, culture and heritage of the region, and imagining what it would be like to 'live the life'.
- **"Adventure"** Many adventurous things to do, fishing, surfing, snorkelling, visit National Parks, gem fossicking, visit coastal townships.

Catalyst Projects

Through the consultation and review process 16 catalyst projects have been identified for the Central Queensland Region over the next ten years. These projects are tourism investment or infrastructure projects of regional significance which are expected to act as a catalyst to a range of other investment, marketing and product development opportunities.

These catalyst projects were identified as:

- Agnes Water/Seventeen Seventy Tourism and Recreation Master Plan
- Accessibility of Agnes Water/Seventeen Seventy
- Backpacker Investments in Central Queensland
- Development of a Gladstone Showcase Facility
- GeoPark Tourism Attraction at Capricorn Caves
- Kroombit Tops Development
- Mount Morgan Tourism Development
- Rockhampton and Gladstone Public Transport Link
- Revitalising Great Keppel Island
- Rockhampton 4-5 Star Accommodation
- Rockhampton Riverfront Precinct
- Sapphire Gemfields Interpretive Centre
- Sports Tourism Development
- Sustainable Growth at Carnarvon Gorge
- Rockhampton Zoo and Wetlands Research Centre
- Yeppoon Beachfront Tourism Precinct

1 Segmentation Analysis Discussion Paper, Tourism Queensland (November 2008)

Regional Priority Projects

Ongoing investment in tourism products and tourism related infrastructure is required in order to meet the future needs of visitors to each of the distinctive sub-regions of Central Queensland. The TOP provides a summary of the tourism related development projects that have been identified by each of the four sub-regions of Central Queensland (the Local Government Areas of Banana, Central Highlands, Gladstone and Rockhampton) as being essential in meeting the needs of future target markets and market demand. In addition to the Catalyst Projects, a number of regional priority projects are also identified.

Long-term Projects

Long-term projects are those that are likely to occur outside the ten year timeframe of the TOP or are not feasible to be undertaken at this stage, but remain important projects for Central Queensland. A number of long term projects have also been identified for the Central Queensland Region, grouped by Regional Council.

These projects have been identified by stakeholders but following investigation were not considered feasible to be included in the TOP. This was due to either the fact that the project was not feasible within the ten year time horizon of the TOP or due to significant barriers restricting the project's development. If these barriers and time restrictions can be overcome, than these projects may be undertaken.

Implementation

For the Central Queensland Region's vision for tourism opportunities to be realised in an effective and timely manner, a number of implementation mechanisms are necessary. The Central Queensland Regional Tourism Organisations will be responsible for managing and co-ordinating the implementation of the TOP in partnership with the State and Local Government. The Destination Management Officers (DMOs) will monitor progress and assist in forming project groups of relevant agencies as required to take the project recommendations forward.

The TOP aims to provide a clear set of priority projects for the destination to guide product development partnerships and local planning. More importantly, the plan provides a vision and direction for future tourism development that meets the needs of the community and consumers alike.


Scuba Diving, Fitzroy Reef Lagoon

3 A Vision for the Central Queensland Region

Gladstone Marina

The Central Queensland DMPs (2007), identify the vision for the region as *'Support a partnership approach to tourism development and marketing to create a sustainable and profitable tourism industry throughout Central Queensland'.*

The *Central Queensland; A New Millennium Report* (2002) identifies the vision for the region as *'Central Queensland aspires to be the most diverse and prosperous region in Australia. This will be achieved by economic growth that is ecologically sustainable and where people and industry work in harmony with the environment for the benefit of both present and future generations whilst respecting the diversity of our past'.*

In order for the recommendations of the TOP to be agreed by stakeholders, prioritised and taken forward, there is a need to develop a clear vision for tourism related investment and infrastructure in the Central Queensland region over the next ten years.

3.1 Central Queensland Tourism Opportunity Plan Vision

From the stakeholder consultation process, a number of common themes can be identified as core elements of a vision for the future growth and development of tourism in the Central Queensland region. The following ***development goals*** were used as the basis for the vision for tourism opportunities in Central Queensland to 2019.

The types of development desired in Central Queensland are projects that:

- Contribute to a positive image of area as **destination in its own right** (not just a stopover) for local and international visitors and business people;
- Recognise and highlight the internationally and nationally **significant natural and heritage assets**;
- Successfully **blend eco and industrial tourism** to create a spectrum of experiences that encourage an increased length of stay;
- Protect and enhance the **lifestyle** of residents in Central Queensland;
- **Target a specific market** that appreciates the region's unique character and successfully provide infrastructure suitable to their needs;
- Products that match the natural assets of the region that provide **immersive experiences** where you can get away from the crowds; and
- Support a **profitable and sustainable** tourism industry.

The recommended Central Queensland TOP Vision is:

"Encourage profitable and sustainable development that immerse targeted visitors in experiences that are sensitive to the unique natural and cultural assets and the lifestyle of Central Queensland"

The Central Queensland region will provide a number of 'signature experiences' for both the domestic and growing international market. These experiences will be developed to position the destination known for uncrowded nature-based tourism, access to the Southern Barrier Reef and Islands, hands-on geo-tourism, industrial and educational tourism, and an experience of the relaxed, outdoors and active lifestyle of the people of Central Queensland. The catalyst and regional priority projects included in the TOP aim to deliver on these experiences while supporting economic growth and contributing to the quality of life of the destination's residents.

3.2 Target Markets

Domestic Consumer Segmentation

Since the Central Queensland DMPs were published, Tourism Queensland has undertaken a new approach to identifying domestic target markets, based on consumer segmentation. The segmentation is a result of research of some 6,000 Australian consumers, looking to understand the emotional drivers for their ideal holiday experience. Based on the results of this research the consumer group best suited to Central Queensland is the 'Connectors'. This group make up 32% of the travelling domestic population including a wide range of lifecycle segments from families to empty nest and retired couples.

Connectors see holidays as a chance to connect with the people they care most about. They will often compromise their own preferences in terms of activities to ensure everyone has a good time. It's about what is real and what's really important; (Tourism Queensland, 2008)[4]

The Central Queensland DMPs (2007) identify the core target market segments that are expected to provide the greatest potential for growth of tourism in the region. These target markets align well with the 'Connectors' market segment, however it is important to note that 'Connectors' needs go beyond that of a lifestage and look for experiences that bring the group together. For the purpose of the TOP the following target markets are the primary focus for product development and marketing activities from 2007 – 2010 and should also provide the focus for the TOP in recommendations made on infrastructure and investments priorities.

Core Target Markets

- Couples and families 35 years and over from Brisbane and South East Queensland
- Young parents from Regional Queensland (excluding South East Queensland)
- Couples and families 35 years and over from Northern New South Wales

Special interest and developing markets include long-haul self-drive, visiting friends and relatives, fishing, fly/drive, geo tourism, golf tourism, adventure/nature-based, education, marine, sporting, business and events. A growing target market for the region will be international visitors including Central Queensland as part of a larger coastal itinerary (Cairns to Brisbane) travelling in hire cars or on long-distance buses.

Target Market Needs

In addition to the 'Connector' market regional stakeholders identified the following emotional needs that a Central Queensland holiday will meet for the visitor in 2020.

- **"Escape"** Escape to Reality – Real Adventure, Real Experiences, Real Holidays. From snorkelling the reef, fishing and surfing to gem fossicking, outback cattle stations, scenic gorge country, or touring industrial giants – the experience is real in Central Queensland, not manufactured;
- **"Discovery"** Discovering nature, discovering industry, heritage, culture and discovering self. Experiences of exploring, learning, reconnecting, understanding, reflecting, regenerating, rejuvenating;
- **"Learning/Education"** Learning about the lifestyle of the Central Queensland Region, learning about the industry and job opportunities, learning about nature, culture and heritage of the region, and imagining what it would be like to 'live the life';
- **"Adventure"** Many adventurous things to do, fishing, surfing, snorkelling, visit National Parks, gem fossicking, visit coastal townships.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4 Segmentation Analysis Discussion Paper, Tourism Queensland (November 2008)

46 : Outback Tourism

Queensland's Outback is a vast, rugged and splendid region, spanning an area of some 832,000 square kilometres in Western Queensland. This ancient landscape is rich in traditional and contemporary Australian heritage, fossilised history and colourful characters of the Australian bush.

The Outback region is a unique tourism environment offering numerous natural, cultural, heritage and indigenous attractions. National Parks abound and the natural features of the landscape cater for a range of special interest activities.

More than just a spectacular and unique region, the Queensland Outback is synonymous with a real Australian experience that embraces the nation's cultural heritage and pioneering spirit.

The Outback Queensland Tourism Association is the official Regional Tourism Organisation (RTO) responsible for the marketing of the destination.

EXECUTIVE SUMMARY

Purpose

The purpose of this Tourism Opportunity Plan (TOP) is to provide direction for the sustainable development of tourism in Queensland's Outback, Gulf and Western Downs over the next five years. The TOP aims to:

- Identify new and upgraded **tourism product** that meets future visitor expectations and demands;
- Identify the need for new investment in **infrastructure** that supports the ongoing development of tourism;
- Provide relevant **research based** information on tourism supply and demand; and
- Provide an agreed focus and mechanisms for **engagement** with the tourism industry, infrastructure providers and private investors.

The audience of the TOP includes Local, State and Federal Government agencies, regional economic development agencies, regional and local tourism organisations, investors and developers and tourism industry operators.

For the purposes of this TOP, Queensland's Outback, Gulf and Western Downs will be referred to as **'the Region'** incorporating the following six distinct Tourism Precincts:

- Gulf of Carpentaria;
- North West Outback;
- Central West Outback;
- South West Outback;
- Far West Outback; and
- Western Downs.

Each precinct has its own distinct character and experiences and therefore its own tourism development and investment needs.

This TOP does not purport to canvass <u>all</u> possible projects for the Region. Recommendations made in this TOP following initial stakeholder consultation have been developed through an assessment of projects based on an agreed set of criteria:

- The project meets the **needs of target markets**;
- The project capitalises on a particular **destination attribute** that creates appeal;
- The project has the potential to **stimulate growth** in the Queensland Region over the next 10 years;
- The development of **new products compliments** and does not unnecessarily compete with existing products;
- There is a **strong level of interest** and support from local stakeholders;
- The project is aligned with the vision for the region and **community aspirations**;
- The **likely net benefits** span across the social, environmental and/or economic outcomes;
- **Aligns with Local/State/Federal Government priorities** and is likely to gain political support.

Catalyst Projects

The top 22 catalyst tourism projects identified from across the Region's six precincts are listed below. These projects are considered to be the marquee projects that represent the character and appeal of the Region and which will drive ongoing growth and development of tourism across the region:

1. Lawn Hill / Riversleigh Tourism Master Plan
2. Normanton Monsoon Centre development
3. Karumba Barramundi Discovery Centre extension
4. Mt Isa Lake Moondarra Master Plan
5. Julia Creek 'At the Creek' Stage 2 development
6. Porcupine Gorge National Park development
7. Qantas Founders Museum expansion
8. Australian Stockman's Hall of Fame expansion
9. Lark Quarry Dinosaur Trackways upgrade
10. Australian Age of Dinosaurs Stages 2 and 3
11. Cosmos Centre expansion
12. Blackall Woolscour Precinct development
13. Strategic Plan for the Burke and Wills Dig Tree
14. Regional Indigenous Story development
15. Great Desert 4WD journey
16. Birdsville Big Red Sand Dune Walk
17. Nindigully Precinct preservation
18. Eromanga Outback Gondwana Dinosaur Attraction
19. Roma Big Rig expansion
20. 'Hand Made in Country' – Western Downs
21. Lake Coolmunda Master Plan implementation
22. Carnarvon Gorge Unique Accommodation

Region-Wide Projects

The following 14 region-wide projects have also been identified which are expected to address issues that are relevant across the entire Region and act as enablers for further investment and development opportunities:

1. Touring Market & Themed Routes
2. Integrated Camping & Caravan Strategy
3. Coordinated Events Strategy

4. Paddock to Plate Strategy
5. Outback Historical Sites Tourism Plan
6. Outback Birding Opportunities
7. National Park Ecotourism Opportunities
8. Visitor Information & Weather Reporting Program
9. Backpacker Market Potential
10. Town Character Themeing
11. Barramundi Stocking Program
12. Energy Efficiency Program
13. Accommodation Needs Analysis
14. Industry Story-Telling Workshops

Precinct Projects

In addition to the catalyst projects a suite of precinct tourism projects have been identified for the six Region precincts and these are outlined further in the report. These projects are considered important to the tourism growth of their precincts and as drivers for a range of other investment, marketing and product development opportunities.

Implementation

The Region's peak tourism 0rganisations and Tourism Queensland working in partnership with local governments and the Department of Employment Economic Development and Innovation will take a lead role in advocating and driving implementation of TOP projects. Effective and timely implementation of the TOP will require leadership and resources from Local, State and Federal Governments, regional economic development agencies, regional and local tourism organisations, investors and developers and tourism industry operators.

CONTEXT

1.1 What is a Tourism Opportunity Plan?

The purpose of this Tourism Opportunity Plan (TOP) is to provide direction for the sustainable development of tourism in the Queensland's Outback, Gulf and Western Downs over the next five to ten years.

The TOP aims to:

- Identify new and upgraded tourism product that meets future visitor expectations and demands;
- Identify the need for new investment in infrastructure that supports the ongoing development of tourism;
- Provide relevant research based information on tourism supply and demand; and
- Provide an agreed focus and mechanisms for engagement with the tourism industry, infrastructure providers and private investors.

In November 2006, the Queensland Government delivered the Queensland Tourism Strategy, a 10-year vision for sustainable tourism. To achieve this vision, Tourism Queensland (TQ) and the Queensland Tourism Industry Council (QTIC) in partnership with the Department of Employment, Economic Development and Innovation (DEEDI) developed six key themes.

Under Theme Two 'Investment, Infrastructure and Access' Tourism Queensland in partnership with the Regional Tourism Organisations (RTOs) was responsible for preparing Regional Tourism Investment and Infrastructure Plans (RTIIPs) for each tourism region across Queensland. The TOP is the new name for the RTIIP, a title that is considered to better represent the content and intent of the document.

The audience of the TOP includes Local, State and Federal Government agencies, regional economic development agencies, Regional and Local Tourism Organisations, investors and developers and tourism industry operators.

The development of the TOP has been based on extensive research as well as consultation with a diverse range of regional and external stakeholders including government agencies, tourism industry, tourism stakeholders, developers and investors. Hundereds of stakeholders were consulted throughout this project, through one-on-one interviews, attending council meetings and hosting interactive stakeholder forums.

The TOP provides a platform which focuses specifically on tourism product, investment and infrastructure needs that are critical to the future growth and development of tourism in the region.

1.2 The Region

For the purposes of this TOP Queensland's Outback, Gulf and Western Downs will be referred to as **'the Region'.** The Region is comprised of the following six precincts as depicted in Map 1 on Page 3:

The Gulf of Carpentaria

The Gulf Savannah is 186,000 square kilometres of safari country with vast golden savannah grasslands abounding with wildlife, endless bushland and wide open spaces, spectacular flora and fauna, changing landscapes, World Heritage fossil fields, historic towns, Aboriginal rock art, gemstones and gold.

It has some of the best fishing in the world and the natural phenomena of meandering river systems, hot springs, lava tubes and deep gorges full of wildlife. The Gulf extends west of the Atherton Tablelands from Mt Garnet to Karumba and is made up of six shires - Etheridge, Croydon, Carpentaria, Burke, Mornington and Doomadgee.

North West Outback

Deep in dinosaur fossil country the North West region covers over 206,000 square kilometres of vastly rocky terrain. Stretching as far as the eye can see, the landscape is harsh but beautiful, and visitors may be amazed by stunning hidden lakes and dams, delve underground on a working mine tour, trek to breathtaking gorges or try their hand at fossicking.

The North West region encompasses the Local Government areas of Mount Isa, Cloncurry, McKinlay, Richmond and Flinders.

Central West Outback

Central West Queensland is the 'heart of the Outback' and extends over 240,000 square kilometres. It is where visitors can experience the heritage and cultural history that has shaped the nation. Visitors to the Central West can learn about the pioneering years through innovative museums, attractions and exhibitions and see not only where the legend of the stockman started, but also where Qantas carved its name in the history, where our pastoral industry began and where Banjo Patterson drew his inspiration for the infamous Waltzing Matilda ballad.

The Central West includes the Local Government areas of Longreach, Winton, Barcaldine, Blackall-Tambo and Barcoo.

South West Outback

Stretching from Mitchell in the east, to Birdsville in the west, Queensland's South West Outback region covers a landscape of 232,000 square kilometres and includes the four shires of Murweh, Paroo, Quilpie and Bulloo.

The South West is a fusion of stunning red sand hills, abundant wildlife and magnificent flora and fauna with picturesque bushwalking trails and unspoiled wilderness. Visitors to the South West can fish in the many billabongs, rivers and lakes, or enjoy hot artesian springs and natural mud baths.

Far West Outback

Covering an area of 155,000 square kilometres, Far West Queensland is always abuzz with events to keep any traveller entertained. Including everything from fishing competitions, Ute and Wagon Musters and Car Rallies to bronco branding or the famous camel races and Birdsville Cup, there is something for everyone in Far West Queensland. The Far West region includes the two Shires of Boulia and Diamantina.

Western Downs

The Western Downs takes in the townships of Tara, Miles, Goondiwindi, Chinchilla, Wandoan and extends as far as St George, Surat, Roma and Carnarvon Gorge. Underpinned by productive agricultural land, innovative manufacturing industries and abundant natural gas and thermal coal reserves, the region is thriving with energy and opportunity.

The Western Downs is the gateway to the Outback, so visitors should expect to get a taste of outback hospitality, classic pubs, open roads and great fishing and birdlife.

As a result of the Local Government reform in March 2008, the Region incorporates the Local Government Areas (LGA's) in Table 1 below (see Map 1 on the following page):

These 24 Local Government Areas combine to cover almost half of the total area of Queensland or approximately one million square kilometres. The Region is home to only 1.2% of the State's population. Over the five years to 30 June 2006 this population has decreased by 1.0%, compared with a 2.4% average annual population increase for the State.

Despite its population, the Region plays an essential role in Queensland's economic growth and Gross Regional Product with a predominant farming and agricultural industry ($2,468.3 million), supported by a fast growing mining and resources industry.

With such rapid growth in the mining sector over the past decade, the tourism industry in the Region has faced increasing competition as a priority for economic development in the region. On the other hand, the mining boom has also resulted in rapid development and infrastructural growth for many towns across the region, providing necessary support infrastructure to support future tourism development.

Tourism in the Region is a partnership between the following organisations to promote and develop the true Queensland experience including:

- Outback Queensland Tourism Association (OQTA)
- Toowoomba , Golden West & South Burnett Tourism (TGWSBT)
- Gulf Savannah Development (GSD)
- Tourism Tropical North Queensland (TTNQ)

Table 1. The Region's Local Government Areas

Gulf	North West	Central West
• Burke Shire • Carpentaria Shire • Croydon Shire • Etheridge Shire	• Mount Isa City • Cloncurry Shire • McKinlay Shire • Richmond Shire • Flinders Shire	• Longreach Region • Winton Shire • Barcaldine Region • Blackall Tambo Region
South West	**Far West**	**Western Downs**
• Murweh Shire • Paroo Shire • Quilpie Shire • Bulloo Shire	• Boulia Shire • Diamantina Shire • Barcoo Shire	• Balonne Shire • Goondiwindi Region • Maranoa Region • Western Downs Region

Map 1. The Outback, Gulf and Western Downs Region

Tourism in the Region

How has tourism in the Region changed over the last ten years?

In Australia the 'outback' is a place that is synonymous with the Australian spirit, culture and heritage. The Region is home to many of the places and characters that embody this outback experience. The Region has always been part of the fabric of Queensland's past and current heritage, with its diverse Indigenous, European and pioneering history, stories of hardship and triumph throughout the rugged landscape, and its friendly towns and heroes of the bush.

Over the last decade, the Region has been exploring its ancient past, aiming to effectively position and develop a unique 'Australian outback' identity.

As described in the 2005 'Our Outback Strategy', the 'outback' is not one destination but a wide range of unique experiences offered in different areas. There is a need to identify the key points of difference and uniqueness of the individual areas across the Region.

While European heritage and the frontier characters remain a strong selling point for the Region its unique natural landscape, dinosaur history, opal and gem fossicking and Indigenous landscape stories provide the opportunity for the region to renew its magnetism and appeal as a world-class destination.

What is the current tourism profile of the Region?

Attracting only 1-2% of the total Queensland tourism market, the Region is considered an 'emerging' destination. Significant opportunities remain in the domestic market (which accounts for 93% of visitation) where three in every four Queenslanders are aware of the Region but only 6% nominated it as their first or second favorite destination.

Visitation trends over the past ten years show a decline in key visitor markets in both the domestic and international segments. However, anecdotal evidence from operators suggests that recent visitation trends have been more positive. This difference may be a result of the high level of visitation that the Region receives from niche markets, such as weekend fishing trips, bird-watching and gem fossicking, activities through which the visitor may not consider themselves on 'holiday'.

Domestic visitation to the Region is currently a 50/50 split between intrastate and interstate travel. The Intrastate market originates predominantly from the South East Corner. The interstate market originates from New South Wales and Victoria. Business travel also accounts for a large proportion of travel and the importance of this sector is vital during low peak visitor season.

In comparison, the international market, which only accounts for 7% of total visitation, is predominately a holiday visitor market, with New Zealand and Europe as key source markets. While international visitation to the Region is currently low, the average length of stay has increased highlighting the opportunity for regional dispersal and up-selling of complimentary experiences and activities.

Between 2006 and 2010, visitors to the Region participated in a range of activities with the most popular types of experiences being National Parks and bushwalking along with cultural activities. International visitors were more likely to engage in Indigenous experiences and attend festivals, fairs or other cultural events. Australian visitors have increasingly been attracted to cultural activities and nature-based activities over the past 10 years. Niche markets such as fishing, camping, and four wheel driving have also attracted recent attention.

Figure 1. Activities participated in on last trip to Queensland Outback (representative of the wider Region)

Activity*	Domestic Visitors		International Visitors	
	Qld Outback	Australia	Qld Outback	Australia
National Park and Bushwalking Activities	10%	16%	85%	56%
Cultural Activities	12%	7%	62%	31%
Festivals / Fairs / Cultural Events	<2%	3%	26%	11%
Indigenous Experiences	<1%	0.45%	56%	12%
Heritage Attractions / Experiences	7%	4%	60%	31%
Other Activities	97%	99%	100%	100%

Source: NVS / IVS data

**Note: Activities participated in refers to those undertaken on the respondent's last trip, which included Outback Queensland*

Road travel is the primary transport mode across, in and around the Region with highway networks accessible 90% of the year. A number of themed highway routes have also been developed to help market and promote the towns and experiences on a driving holiday in the Region and to target the touring market.

While rail services into the Region are limited, air access is becoming a competitive sector in regional Queensland with the introduction of regular routes and services to major centres. Continued airport upgrades across the Region, have been driven mostly by the demand of mining and business travel.

In the 2009/10 visitors to the Region spent over $217 million (Tourism Research Australia). While the tourism industry is still only a relatively small sector for the Region (1.6% of Queensland GRP) in comparison to the mining and agricultural sectors, it is seen as a more sustainable long-term option in ensuring a diversified and vibrant economy.

What will the next ten years of tourism in the Region hold?

Faced with increasing competition from other Australian outback destinations and alternative holiday types, the Region will need to identify new and innovative ways to compete as a preferred holiday destination. In addition there are a number of consumer and market trends that are likely to influence the future development and marketing of tourism in the Region. A summary of the range of trends and influences are outlined below:

Global Consumer Trends

- Increasing use of the **internet and social networking**
- Improved access and affordability of **air travel**
- **Value for money** is critically important
- Destination **'brag-ability'** is increasingly important
- Visitors seeking more **'meaningful' experiences**
- Growth in **'voluntourism'**, community oriented-tourism and **'off-the-beaten track'** travel

Australian Market Trends

- **How you feel** is more important than how old you are – the emergence of 'psychographic' segmentation
- The 'Experience Seekers' are looking for **learning experiences**
- Visitors are seeking **authentic interactions** with locals, nature and destinations

Queensland Market Trends

- Visitors are seeking **natural encounters**, islands and beaches, Queensland lifestyle, and adventure
- Visitors want **fun, relaxing and care-free** experiences and to escape the crowds
- An industry shift towards **experience segmentation** – targeting visitor needs and wants

Region Trends

- Visitors to the Region enjoy **long holidays** and value being able to take their time
- Visitors enjoy **discovering / exploring** new things on holiday
- Visitors are **realistic in expectations** about service and luxuries; however
- Visitors are also **looking for 'delighters'** – both tangible and intangible unexpected experiences and interactions

Over the next ten years, visitation to the Region will also be influenced by a wide range of external factors that will impact not only on visitation to the region but to Queensland and Australia as a whole. Provided below is a summary of the Tourism Forecasting Committee forecasts for future tourism demand to 2018 in Australia and Queensland.;

Domestic Trends and Forecasts

- **Stable numbers** of domestic trips
- **Increased** domestic **visitor nights** in Queensland
- Slight **decline in domestic VFR** in regional Queensland

International Trends and Forecasts

- Recovery of Australia's **inbound tourism market**
- **Increased seat capacity** into Australia
- **Growth** in overall international **visitor numbers**
- Increase in **average length of stay**
- **Increase in international VFR** in regional Queensland

CATALYST PROJECTS

Continued investment in tourism products and tourism related infrastructure is required in order to meet the future needs of visitors to the Region. A range of Catalyst Projects have been identified for the six core tourism precincts across the Region. The top 22 catalyst tourism projects identified from across the six precincts are listed below. These projects are considered to be the marquee projects that represent the character and appeal of the Region and which will drive ongoing growth and development of tourism across the Outback, Gulf and Western Downs:

Qantas Founders Museum expansion

Background

Opened in June 1996, the $1.3m Stage 1 of the Qantas Founders Museum in Longreach was developed in recognition of the enormous service Q.A.N.T.A.S. had given to the people of the Outback and aviation in general across Australia and world. Today, the museum houses discovery and education centres, a theatrette, travelling and temporary exhibition areas, display galleries, a restaurant, conference facilities and gift store. The Qantas Founders Museum is the only place in the world where you can tour two fully equipped passenger jet aircraft. The museum offers fully guided tours including a unique wing walk experience allowing visitors to venture out onto the wing of a 747 aircraft, climb down in the computer bay and into the cargo bays, and sit in the pilot seat.

Opportunity

As part of the Qantas Founders Museum planning for 2020, a number of new and innovative development opportunities have been identified with concept planning underway. Building on this already successful Museum, the implementation of future development plans will further increase the appeal of the facility and see it housing 20 planes by the year 2020. This will be the largest collection of aircraft in the world, and will be a major draw-card for international tourists.

Upgrades and expansions to the buildings and refurbishment of existing aircraft are also planned along with the introduction of new interactive and computer displays. Further development will also see an expansion of current story-telling installations to tell the complete Qantas history (beyond 1936). Future potential opportunities also exist for development of accommodation on site.

Support the implementation of the Qantas Founder Museum complex development plans to complete the Qantas story and fulfil the potential of the facility as a significant and must see visitor attraction for Queensland and Australia.

Australian Stockman's Hall of Fame expansion (including Royal Flying Doctors Visitor Centre)

Background

The Australian Stockman's Hall of Fame and Outback Heritage Centre in Longreach is one of Australia's premier outback heritage institutions. The Hall of Fame has five themed galleries, housing the history behind some of Australia's greatest and bravest explorers, stock workers, pastoralists and Aboriginals. The exhibits comprise a mix of objects, images, touch screens, audiovisual presentations and open displays, allowing visitors to interpret the outback story in their own unique way. The museum also houses a vast reserve collection which forms a unique work-in-progress display.

The Royal Flying Doctor Service (RFDS), which began operation in May 1928 in Cloncurry is dedicated to providing vital health care to anyone travelling, working or living in Australia. Since its beginning, the organisation has grown and become an important part of the Australian identity and a significant Queensland story. The opportunity to leverage the success of the Stockman's Hall of Fame and integrate the stories and history of the RFDS has been identified by stakeholders in the Region..

Opportunity

In order to ensure continued tourism growth and visitation for the Australian Stockman's Hall of Fame and the surrounding region, a number of development opportunities have been identified and progressed:

- One of the major initiatives that is currently being progressed is the development of an **Outback Entertainment Centre**, a multi-purpose facility located within the grounds of the Hall of Fame. The facilities of the Outback Entertainment Centre will include two equestrian / event arenas, stock yards, seating, food and beverage facilities, camp sites and amenities. The venue will cater for around 10-15,000 spectators.
- A concept proposal has been prepared for the development of an **'Outback Heritage Camp'** at the Stockman's Hall of Fame site. The Heritage Camp proposes to include twelve luxury safari tents themed on the early settler's style with an authentic Australian feel. The development of a chapel within the surrounding gardens is also proposed to provide facilities for weddings and functions.
- The re-establishment of a **RFDS Visitor Centre** at the Stockman's Hall of Fame site is proposed. The current concept is to build a large hangar styled building including spaces with a mix of interactive and static displays that tell the past and present story of the RFDS, while providing an appreciation for how vital the service remains for a great number of people who live, work and travel in rural and remote regions of Australia. A theatrette is considered desirable and there is a retired aircraft that could form part of the display inside or outside of the building. At present the RFDS is working on a national unified merchandise strategy and sales of these items will occur at the centre.

Support the vision for the expansion of the Stockman's Hall of Fame Outback Heritage Centre to become the show case of Australian Heritage with the addition of an entertainment centre, safari tent camp and RFDS Visitor Centre.

Lark Quarry Dinosaur Trackways upgrade

Background

Lark Quarry, in Queensland's Outback, is currently the only recorded dinosaur stampede on earth. In this place, around 95 million years ago, a large herd of small two legged dinosaurs gathered on the banks of a forest lake to drink when they were startled, potentially by a large Theropod – four tonnes of sharp-clawed, meat-eating dinosaur. A record of those ensuing stampede of dinosaurs is cast in more than 3,300 fossilised footprints.

The Lark Quarry Dinosaur Trackways which house the fossilised dinosaur stampede records is located in the Lark Quarry Conservation Park, 110km south-west of Winton. The Trackways are first approached via the rammed earth entry building containing orientation displays on the history of discovering the Trackways and on the surrounding Jump Up country. Guided tours of the trackways are run daily, interpreting the creation, discovery and display of the fossilised footprint, as well as the surrounding environment and other Cretaceous fossils. The Trackways Viewing Room provides a spectacular display of all 3,300 fossilised footprints. Visitors can also experience the Spinifex Walk, a self-guided walking circuit around the complex.

Opportunity

Support the continual development of the Lark Quarry Dinosaur Trackways experience to ensure repeat visitation and new stories on the attraction penetrate the market. An infrastructure upgrade at Lark Quarry Dinosaur Trackways could include life size dinosaur replicas and footprints. Further, improved visitor amenities and road access is also required at the site.

To compliment the impressive centre housing the dinosaur footprints and bring the footprints to life, this project would involve positioning 'to scale' replicas of the hunter Theropod and the small hunted dinosaur outside the building. The replicas located appropriately in the landscape adjacent to and appearing to 'enter the building' would serve as a spectacular presentation of the site and a strong visual link to the story of the footprints. The replicas would need to be constructed of robust weatherproof materials requiring minimal maintenance.

The development should be designed to coordinate with and cross promote the other dinosaur attractions across the Region including the nearby Australian Age of Dinosaurs centre, Richmond's Kronosaurus Korner and the Eromanga Gondwana Dinosaur Attraction.

Australian Age of Dinosaurs Stages 2 and 3

Background

The Australian Age of Dinosaurs (AAOD) Museum, located 20 minutes from the town of Winton, is home to the world's largest collection of Australian dinosaur fossils. Stage 1 of the museum is now completed and is a working dinosaur museum facility allowing visitors to view the collection of dinosaur fossils and see real dinosaur bones being prepared in the laboratory. Visitors can experience handling and preparing real dinosaur bones in the laboratory, working alongside experienced staff using professional equipment. Guided tours of the facility are available providing visitors with the story of Winton dinosaur discoveries and digs, viewing and working on dinosaur bones and interpretation of the fascinating geology of the Winton district.

Opportunity

Support the proposed Stages 2 and 3 of the AAOD Museum project. Stage 2 involves construction of a reception centre and associated infrastructure to enable the AAOD to handle larger numbers of people and provide a more comprehensive experience to the public. It will also enable the on-site fossil collection to be relocated out of insulated shipping containers and into a temperature controlled display area, and the fossil display currently in Winton to be moved on-site.

Stage 3 would then see the construction of a multi-million dollar working dinosaur museum facility with preparation laboratory, collection and type room facilities, classrooms, theatres and comprehensive displays. It will also encompass a wide range of 'external' displays and dioramas over a large area of the mesa, and the building of all associated infrastructure such as parking space, picnic and rest room facilities, walking trails and guided tour facilities.

The project should coordinate with and cross promote the other dinosaur attractions across the Region including the nearby Lark Quarry Dinosaur Trackway, Richmond's Kronosaurus Korner and the Eromanga Gondwana Dinosaur Attraction.

Blackall Woolscour Precinct development

Background

The Blackall Woolscour operated from 1908 through until 1978 and it is Australia's Heritage at its best. Woolscouring means wool washing. The Scour is an important part of the National Heritage. It is the only steam-driven scour incorporating a shearing shed left in Australia. The site of the scour is located a short 5 minute drive from the main street in Blackall. The area includes a camp kitchen with traditional wood stove ovens, some unused shearer quarters, and plenty of grassed open space. The Woolscour as a tourism attraction received a boost in 2001, the Centenary of Federation with funding through the Queensland Heritage Trails Network for displays and interpretation. Ten years on it is time to revitalise the site.

Opportunity

The Matilda Highway remains a popular track for the drive market, but the needs of the market have changed. An increasing number are taking shorter trips, spending more per day and staying in commercial accommodation. Opportunities exists for Blackall to develop the Woolscour site into an integrated visitor precinct with overnight stay options, with themed accommodation, caravan and motor home facilities and expansion of the existing conference and events facilities. This property would not only service the long haul drive market, but provide an alternative for business and meetings markets from Longreach, Charleville and Emerald.

Strategic Plan for the Burke and Wills Dig Tree

Background

The Burke and Wills Dig Tree is one of Australia's National icons and an enduring reminder of the pioneering spirit and extreme harshness of the outback at any time. Nappa Merrie Station is proud to officially manage the site on behalf of the Royal Historical Society of Queensland. Located on the northern bank of Cooper Creek, the "Dig Tree" is a Coolibah (Eucalyptus microtha) where Burke and Wills' base camp party carved instructions to their buried provisions into the tree. In 1898 John Dick carved Burke's face into another tree (the Face Tree) about 30 metres downstream of the Dig Tree. The site is as Burke and Wills and companions would have viewed it nearly 140 years ago. These trees are an attraction and a link to the explorers of Australia's Historic Past.

Opportunity

Support the ongoing protection, presentation and promotion of the Burke and Wills Dig Tree site through the preparation of a strategic plan for the site. This national icon, that represents a significant part of Australia's pioneering history, requires a range of measures to provide for sustainable visitor access and importantly, to be kept safe from environmental impacts and vandalism. Accessibility is currently inconsistent, as a small amount of rain can cut off roads leading into the site. Significant resources need to be contributed to develop reliable access into the site. The overall development and ongoing promotion of the Burke and Wills Dig Tree will add an important component to the pioneering experiences already existing in the Region and will help Thargomindah to create an outstanding experience for visitors to the area.

Regional Indigenous Story development

Background

In the year ended June 2010, there were 332,000 domestic overnight visitors who participated in Indigenous tourism activities in Australia (0.5% of the Australian domestic market). Of these visitors 62,000 participated in Indigenous tourism activities in Queensland. In addition, 60% of all international visitors who participated in Indigenous tourism activities in Australia made a stopover in Queensland, a total of 417,000 visitors. Over the last ten years, the international market for Indigenous tourism activities has seen over 1% per annum growth, with the predominant source markets coming from UK and Europe.

The Indigenous story of the Region before and after European settlement is not widely known and appropriately presented to the community and travelling public. The rich Indigenous cultural story of the Region for the estimated 40,000 years prior to European settlement has either been lost or fragmented and the story of Indigenous involvement in the development of the Region's industry and communities is also not well presented.

Opportunity

Research and development of the Indigenous story of the Region will not only fill an important gap in the story of the Region but will also add a new and exciting element to the Region's tourism experience. This will assist the Region to further leverage a growing international market of Australian visitors interested in participating in Indigenous tourism activities. It is recommended that further research and development of the Indigenous story and sites of the Region is required in order to develop a plan to incorporate these assets into the Region's tourism experience. Further development of these stories and sites is likely to be through input to existing and new tourism attractions and tours and the provision of infrastructure and interpretation at key sites including, 'The Palace' west of Barcaldine, Hells Gate on the Savannah Way west of Burketown and Boodjamulla (Lawn Hill) / Riversleigh. The opportunity to develop an Indigenous trade and food trail linking key Indigenous sites across the region could also be investigated as a region-wide approach to Indigenous tourism. The trail would link key sites of the Indigenous trade trail from Mt Is, Cloncurry, Boulia, Bedourie, Birdsville, to South Australia. Detailed scoping of the exact route would be required.

Great Desert 4WD journey

Background

At one million hectares, Simpson Desert National Park is Queensland's largest protected area. Across the Simpson, parallel dunes rising to 90 metres run south-east to north-west with dunes extending up to 200 km. With its bare windswept crests and flat open plains, the Simpson Desert is a remote and rugged landscape that requires a four-wheel-drive to reach and drive through the National Park. The Diamantina Shire Council receives many inquiries about new places for four wheel drive visitors to experience the desert. The Old Vermin Proof Fence, which separates the Simpson Desert National Park from the pastoral lands to the East is of great interest to many 4WD visitors.

In the year ended December 2006, over 4 million Queensland visitors participated in adventure activities during their stay in the State. Between 2004 and 2006, growth in the domestic adventure market in Queensland was at 5.7%, with a growth in the international adventure market in Australia growing by 13.7%. The opportunity to capitalise on a growing adventure and 4WD market in the Region is evident.

Opportunity
In response to an increasing market demand for 4WD experiences in the Region, support the development of a dedicated 4WD experience along the 400km journey from Birdsville to Bedourie accessed along the Old Vermin Proof Fence line bordering the Simpson Desert National Park. The entry / exit points to the track would be via the QAA Line from Birdsville or via the Pulchera Waterhole at Ethabuka and Ethabuka-Bedourie Diamantina Shire Road to Bedourie or further North to the Plenty or Donahue Highway. In addition to construction of the 4WD track, establishment of overnight areas, a permitting system and signage as well as the provision of Satphone hiring will be required.

Birdsville Big Red Sand Dune Walk and Desert Interpretive Centre

Background
Big Red, also known by its aboriginal name as Nappamerri, is a huge sand dune in the Simpson Desert that stands approximately 90 metres above sea level and 30 metres above the plain. Located 35 kilometres west of Birdsville, this awesome sand dune, is accessible to most vehicles (dependant on road conditions) and provides a challenge for any four wheel drive enthusiast. One of 1,113 dunes in the Simpson Desert, Big Red is also a popular spot from which to view spectacular sunsets across the region.

Opportunity
Support the development of the Big Red dune walk and associated Desert Interpretation Centre to maximise the visitor experience of this wonder of nature and to make it more accessible to a wider range of people. The dune walk would involve a desert walking platform going up and along Big Red to its summit, allowing tourists to experience both the harshness and beauty of the desert but in a safe and sustainable manner. The Desert Interpretation Centre would be developed as a key component of the dune walk, exploring the fascinating ecological story of the desert and how it is interwoven with desert Aboriginal culture and lifestyle.

Carnarvon Gorge Unique Accommodation

Background
Carnarvon National Park lies within a vast, elevated section of sandstone country in central Queensland, approximately 600km northwest of Brisbane and 300km southwest of Rockhampton. The jewel in the Sandstone Belt, Carnarvon National Park is an area of outstanding natural beauty where erosion of the sandstone has left behind many interesting geological features including sandstone gorges, cliff faces and other wind and water sculpted formations.

Over many thousands of years, Aboriginal people have developed a powerful spiritual connection to the Carnarvon landscape. They believe that spiritual beings were metamorphosed as particular features of the landscape and that they are responsible for the protection of these places. Some of the occupied sites in the park are more than 19,000 years old and their full significance can only be appreciated through knowledge of the legends and rituals with which they were created.

Opportunity
Carnarvon National Park is one of Queensland's icon parks and there is the opportunity to create an iconic and unique accommodation experience through which this status can be maintained and enhanced. The southern and eastern parts of the park are less visited than the main gorge area. These areas offer a unique opportunity for wilderness style accommodation to complement what already exists in the park. Areas like the sculpted sandstone outcrops of Mt Moffatt offer spectacular views from the highest plateau in Queensland (over 1200 metres) and highly significant Aboriginal rock art sites are found in this remote section of Carnarvon National Park.

Building on the success of the Carnarvon Great Walk, an 86km long wilderness trail that links the Carnarvon Gorge and Mount Moffatt sections of the park, a feasibility study and preliminary environmental investigation is needed to assess the viability of remote wilderness lodge style accommodation. Options exist for unique accommodation both in and near the park in various settings. Key to its success will be site management, both to ensure that activities occur in a way that maintains and enhances the park's natural and cultural values and to ensure existing operations are not negatively impacted. A range of interpretive materials would need to be developed in association with the accommodation to enhance visitor experiences and foster a greater appreciation of the park's outstanding geology, history, and cultural significance. Involvement of the traditional owners in this process will be essential.

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