

Tropical North Queensland Destination Tourism Plan

Where rainforest meets the reef



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EXECUTIVE SUMMARY



The Queensland Government has established a target to grow tourism expenditure in Queensland by an additional \$15Bn by 2020, a 100% increase from 2012. Approximately 80% of the \$15Bn in targeted growth will come from only four of the thirteen Regional Tourism Organisation (RTO) locations in Queensland. Tropical North Queensland (TNQ) is the third largest priority growth destination and the only destination located outside South East Queensland that has the capacity and assets to play a leadership role in achieving the growth targets. The TNQ tourism industry is ambitious and wants to achieve the 2020 \$2Bn targets that have been established for this destination.

TNQ has a proud and long standing reputation of being an innovative and entrepreneurial tourism destination that values its natural assets. It is clear that the region's competitive advantage is based on the current and continued health of these natural assets. This has been clearly defined in the new vision for the TNQ tourism industry, which is:

"The world's best destination to engage with nature."

The TNQ Destination Tourism Plan (DTP) has identified **eight key strategic priority themes**, with related strategies and actions, to achieve the 2020 growth targets. The DTP has focussed on building, promoting and exposing the diversity of TNQ's five 'hero' experiences across the largest RTO region in Queensland. The focus of the strategies contained within the TNQ DTP is to:

- Increase the number of visitors
- Increase length of stay
- Increase expenditure per visitor
- Increase likelihood of repeat visitation
- Distribute economic benefit across TNQ.

The Priority Themes proposed for the TNQ DTP are:

TNQ DTP PRIORITY THEMES		
Building the Context	Primary Drivers	Enabling Drivers
Destination Image	Touring	Infrastructure & Product Investment
	Events	Digital Leadership
	Aviation	Quality Service & Innovation
		Partnerships & Building Delivery Capability

The Primary Drivers of growth will be led through Touring, Events and Aviation. These priorities will only be successful if sufficient focus is also provided on Building the Context (Destination Image) and the Enabling Drivers. These will be required to raise the profile and further develop the capacity of the region to achieve and sustain the growth targets.

Based on the preliminary forecast modelling that has been undertaken, the **Growth Potential Target Scenario indicates that \$4.63 Billion** in tourism expenditure could be achieved by 2020. This would consist of the international market growing from \$885 Million to \$2.19 Billion and the domestic market from \$1.72 Billion to \$2.44 Billion. It has been estimated that this additional tourism expenditure would generate an additional \$2.1Bn in additional economic impact. This could provide a **total economic growth of \$4.1Bn**, which would provide approximately **20,000 additional jobs** in total across the regional economy.

China is the key market that offers the most significant opportunity to grow international visitors to TNQ to support achieving the 2020 growth target.

Securing additional private and public investment in new infrastructure, products and interpretation, whilst also investing in the management of the natural assets to world class standards will continue to be critically important to the ongoing viability and competitiveness of the tourism industry. Adopting **innovative approaches** that develops



the tourism industry, whilst also **protecting and enhancing TNQ's natural assets**, will be vitally important for TNQ to authentically demonstrate that the destination vision is being delivered to meet current and future consumer needs.

Tourism is the key driver of the regional economy, which is the region's biggest strength and weakness. Since 2009 the region has undertaken considerable development planning and implementation to strengthen the resilience of the regional economy. Consequently, the implementation of the **TNQ DTP should be coordinated and integrated** with the implementation of the TNQ Regional Economic Plan and the RDA FNQ & TS Roadmap.

To move from organic growth to approximately a 77% increase in growth in 6 years will require significant leadership and involve the management of complex issues and opportunities, risk, interdependencies and conflicting priorities. Adopting an appropriate management framework, such as Managing Successful Programs, will be required to successfully implement the TNQ DTP.

The current fiscal position of all levels of government is constrained and **innovative approaches to securing the resources** to successfully deliver the TNQ DTP will be required. The following are suggested as potential sources of resources that should be reviewed and considered:

- Evaluate the return on investment (ROI) of planned government investment for the region against anticipated TNQ DTP outcomes. Where it is demonstrated that the TNQ DTP outcomes can provide increased return on investment and improved community benefits, scarce government funding could be re-allocated and invested in the management and implementation of the TNQ DTP;
- Current operating structures, funding models, strategic priorities and resource allocation of the RTO & LTOs;
- Opportunities for short and long-term secondments of key personnel from other organisations e.g. Advance Cairns, RDA FNQ & TS, Transport & Main Roads, Parks & Wildlife, local government etc. to the TNQ DTP Implementation team;
- Securing stronger support and investment from local governments in the region particularly with regard to investing in destination marketing and aligning capital works programs with the touring and events strategies;
- Explore user pay funding models;
- Alternative investment models for national parks and the management of other natural assets to provide increased and targeted use of available resources;
- Royalties and levies that are generated from catalytic projects should be distributed to fund key TNQ infrastructure and services and key regional economic development initiatives that strengthen the resilience of the regional economy and natural assets.



1

INTRODUCTION



Tropical North Queensland (TNQ) is home to Australia's tourism pioneers, the risk takers that make quantum leaps for tourism in Australia through bold and visionary tourism investments. 2014 marks an exciting time for the tourism industry following:

- Sustained period of positive growth following industry challenges that resulted from the Global Financial Crisis (GFC);
- Increasing growth from China;
- Prospect of significant private sector investment in multi-billion dollar catalytic tourism infrastructure projects in TNQ;
- Tourism is one of the four pillars of the Queensland economy and the Queensland Government is working closely with industry through Destination Q forums to double tourism expenditure in by 2020; and the
- Identification of the TNQ Destination as the third key growth destination in Queensland that has the capacity to significantly contribute to achieving the 2020 growth targets.

TNQ took control of its destiny following the GFC and for the first time has mapped out a clear vision and direction for future development through the Regional Development Australia Far North Queensland & Torres Strait Regional Road Map, and the Advance Cairns Tropical North Queensland Regional Economic Plan (TNQREP). The key purpose of these documents was to reduce the volatility and strengthen the regional economy and community. These plans recognise that the TNQ Tourism Industry remains the key economic driver for this region. The industry is highly reliant on the quality of the Great Barrier Reef (GBR), which is facing a number of challenges. It is therefore vital that to continue this momentum and strengthen the resilience of the industry and regional economy that a holistic and integrated plan is developed for the tourism industry that:

- Focuses on effectively managing the quality of the GBR and other key natural assets
- Further builds and promotes the other 'Hero Experiences' ; and
- Aligns with the key regional development plans.



The purpose of this TNQ Destination Tourism Plan (DTP) is to provide the definitive direction for tourism and events in TNQ towards 2020, highlighting the resources required to create a sustainable and competitive tourism destination. Furthermore, the DTP needs to identify the key priorities that will facilitate this goal.

This DTP has been developed for Tropical Tourism North Queensland (TTNQ) the Regional Tourism Organisation (RTO) for TNQ and Tourism Events Queensland (TEQ) by Possible People in partnership with RGG Insights and Inspired by Marketing. Valuable input has been provided in the development of the TNQ DTP by TTNQ, TEQ, all of the TNQ Local Tourism Organisations (LTO), Local Government and various other key stakeholders referenced in Appendix A, which is gratefully acknowledged.

This report has been structured as follows:

- Sections 2-5 provides an overview of the DTP Objectives, the role of tourism in TNQ and a general TNQ tourism overview;
- Sections 6-7 outlines the Competitive Advantage of the region and the existing target markets;
- Section 8-11 outlines where the TNQ Tourism Industry should focus to achieve the Queensland Government 2020 growth targets;
- Sections 12 outlines a potential model for implementing the TNQ DTP and securing resources;
- Sections 13-14 includes the Conclusion, Recommendations & Next Steps.

1. Tropical North Queensland 'Hero Experiences' Fact Sheet, Tourism Queensland, June 2013

2. Queensland Destination Tourism Planning Framework Tourism Events Queensland November 2013

2

DESTINATION TOURISM PLAN OBJECTIVES



The Queensland Destination Tourism Planning Framework² outlines the key objectives for the development of the DTP, which are:

- Develop and implement a best practice destination tourism plan to attract visitors, distribute economic benefits across TNQ and support a sustainable tourism industry;
- Outline the value of tourism and events to the wider TNQ regional economy in terms of expenditure, jobs and industries supported by tourism and events;
- Recognise and build on the unique features of TNQ and its stakeholder needs;
- Identify unique tourism experience, product and event development opportunities and associated key infrastructure needs required to meet the needs of consumers;
- Confirm a clear events strategy and direction;
- Influence policy and legislation to benefit the tourism industry and to facilitate continual improvement (capacity building);

- Strengthen environmental management and planning for future growth.

Tourism is one of the four pillars of the Queensland Government's economic development strategy. The Government has outlined ambitious growth targets to double Queensland's tourism expenditure from \$15 Billion to \$30 Billion per year by 2020 through Destination Q.

Figure 1 below indicates that approximately 80% of the targeted growth will come from only four destinations out of thirteen RTO's. Tropical North Queensland (TNQ) has been identified as the third priority growth destination and the only destination, of the four priority growth areas, located outside South East Queensland. The TNQ tourism industry has been identified as having the potential to grow by approximately an additional 77% from providing \$2.6 Billion per year in tourism expenditure to \$4.6 Billion per year by 2020. This equates to an annualised growth rate of 12.8% per annum over the next 6 years.

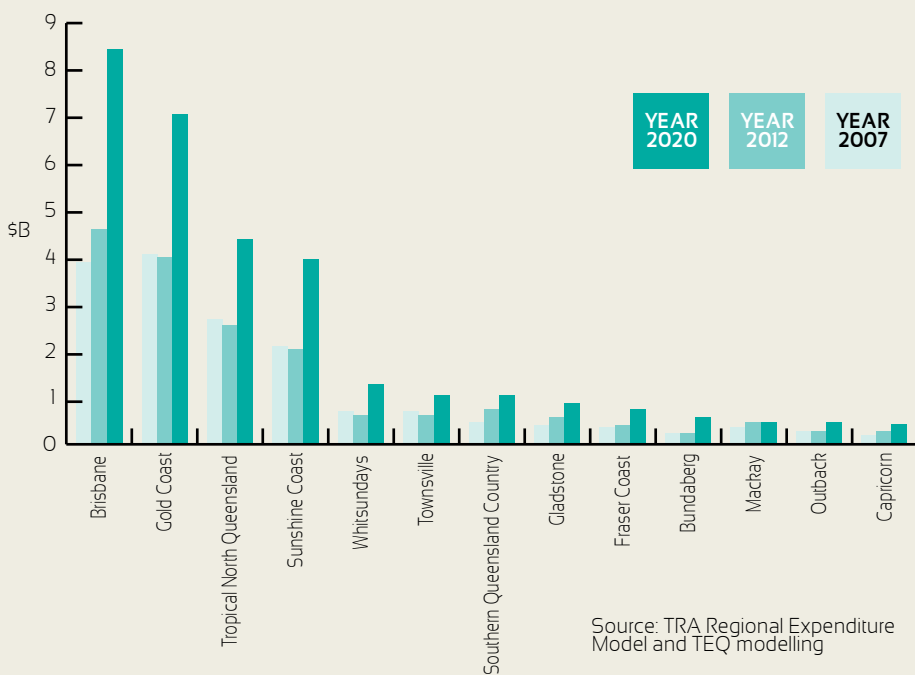


Figure 1 - Visitor Expenditure Estimates by RTO

The Tropical North Queensland (TNQ) Destination Tourism Plan (DTP) will be used by the Queensland Government and the TNQ Regional Tourism Organisation (RTO) and Local Tourism Organisations (LTO's) as the primary strategic planning document for the development of the tourism industry. The TNQ DTP also aligns with and supports the Queensland Government's 20 year plan (Destination Success) for the growth of the Tourism Industry, which is outlined in Appendix B.

These objectives and key factors have been used to establish the direction of the TNQ DTP.

3. Destination Q Blueprint 2012-15 - How we are building tourism together - Queensland Government - 2012, Destination Q Action Plan - January 2014 - June 2015 and Destination Q - Cairns 20 YEAR PLAN WORKSHOP OUTCOMES - Friday 21st June 2013
 4. 2020 Strategic Marketing Plan, Tourism and Events in Queensland, Tourism & Events Queensland, 2012
 5. Destination Success - The 20 year plan for Queensland tourism - Department of Tourism, Major Events, Small Business and the Commonwealth Games - February 2014

3

ROLE OF TOURISM AND EVENTS IN TNQ COMMUNITY



On average 34,400 visitors are in the TNQ region each day hosted by 173 accommodation establishments. The most recent available regional information highlights tourism employment totalled 18,700 in 2007/08, Gross Regional Product \$1.3 billion and Tax Revenue \$215 million. A total of 3973 Tourism Businesses facilitated visitor expenditure of \$7.8 million per day. The marine fleet was the largest in Australia, transporting in excess of 1 million guests per annum through more than 1400 products.

Business Tourism events contribute \$100 million directly to the local Cairns economy and over \$350 million to the wider TNQ region, with over 922 business events bringing 70,000 delegates to the region each year.

Inbound and outbound aviation capacity is approximately 2.5 million for domestic and 533,000 international. Cairns Airport is the 7th busiest airport in Australia, and 6th busiest for international passengers. It is estimated that approximately 48% of domestic arrivals and 65% of international visitors used air services to access the region.



4

ABOUT TROPICAL NORTH QUEENSLAND



4.1. Destination Overview

Tourism Tropical North Queensland is the peak regional visitor destination marketing organisation and Regional Tourism Organisation (RTO) for Tropical North Queensland, Cairns & Great Barrier Reef. The TTNQ region has the largest geographical coverage in Queensland, covering 20% (340,645 km²) of the total area of Queensland and yet is home to just 6% of the state's population (271,404 at June 2011), with an estimated population growth to 328,000 by 2031.

The TNQ region consistently ranks in the top five destinations visited by international visitors to Australia, and the top twenty destinations visited by domestic overnight visitors. The region is best known as the gateway to the world heritage listed Great Barrier Reef and the Wet Tropics Rainforests, and the only place in the world where two world natural heritage listed sites meet. These unique attributes have positioned the region as a popular tourist destination and resulted in the development of a diverse range of tourism facilities and opportunities.

The region is broken into the following six tourism precincts supported by separate LTO's :

TNQ Tourism Precinct	Local Tourism Organisation
Cairns, Northern Beaches and Palm Cove	Cairns & Great Barrier Reef (TTNQ as RTO)
Atherton Tablelands	Tropical Tablelands Tourism
Port Douglas and the Daintree	Tourism Port Douglas & Daintree
Cassowary Coast/Mission Beach	Tropical Coast Tourism
Cooktown, Cape York Peninsula & Torres Strait	Tourism Cape York
Gulf Savannah	Savannah Way

The RTO consults extensively with the tourism industry in Cairns and as a result fulfils the LTO role for Cairns & Great Barrier Reef.

4.2. Hero Experiences

Tropical North Queensland is a destination built on the draw of its one of a kind natural assets, lifestyle and culture and is home to five 'Hero Experiences', which are:

- Great Barrier Reef
- The world's oldest tropical rainforest
- Tropical lifestyle and culture
- Adventures
- Aboriginal and Torres Strait Islander People.

The Great Barrier Reef is the primary draw card for visitors to TNQ followed by the rainforest, tropical lifestyle, adventure and indigenous experiences.

TNQ has one of the highest rates of indigenous population in Australia. There is a significant opportunity to increase the opportunity for visitors to connect with the culture and creativity of TNQ's vibrant Aboriginal and Torres Strait Islander people.

Supporting the development and promotion of all the Hero Experiences, sharing stories and engaging visitors with people and places will be paramount to diversifying the tourism industry, increasing resilience, distributing the benefits and sustaining competitive advantage.

4.3. Planned Investment

TNQ has a proud entrepreneurial history that has involved identifying and creating catalytic infrastructure projects that have propelled the region forward. There are currently a number of major tourism related infrastructure projects currently being planned in the region including:

- \$4.2 Billion Aquis Great Barrier Reef Resort
- \$1.3 Billion Ella Bay Integrated Resort Development
- \$1 Billion Cairns Airport redevelopment
- \$500 Million Mount Emerald Wind Farm, including the Asia-Pacific Energy Innovation Centre
- \$250 Million Sheraton Mirage major refurbishment and expansion
- \$100 Million Adventure Water Water Park
- \$40M Cairns Shipping Development Project

These major catalytic projects are part of the development and DNA of this region and present game changing opportunities for the next leap forward.

The implementation of the TNQ DTP should align and be coordinated with the TNQ Regional Investment Strategy (TNQ RIS) developed by Advance Cairns to encourage and support projects that align with the vision of the region. Tourism projects that receive wide scale community support, align with the vision of the region and provide adequate return on investment for public investment (where provided) should be actively supported and encouraged through the TNQ RIS. Refer to Section 12.3 for the need to critically assess current public funding commitments for potential re-allocation to invest in the priorities identified in the TNQ DTP.

TTNQ fully supports catalytic projects that support achieving the growth targets for the region including projects such as the Aquis Great Barrier Reef Resort. Refer to Section 9.5 (Product and Infrastructure Development) for specific strategies and actions identified by TTNQ to support this project.

6. Tropical North Queensland 'Hero Experiences' Fact Sheet TTNQ/TEQ June 2013

7. <http://www.cairnsinvestment.com.au/invest-here/current-major-projects>

5

DESTINATION TOURISM PERCEPTIONS



This section provides an assessment of the community's and tourist's perceptions of TNQ:

5.1. Visitor Perceptions

TNQ - WHAT DO CONSUMERS KNOW ABOUT THE DESTINATION?		
	What they know well	Where we can improve
It is a place that is...	Warm, friendly (49%) Adventurous (48%) Fun (42%) Welcoming (41%) Fresh (41%) Healthy (43%) Easy going 48%	Energetic (21%) Outgoing (24%) Enthusiastic (25%) Positive (37%)
Where I can...	Relaxed (42%)	Energised and invigorated (25%) Refreshed and revitalised (32%) Spend time reconnecting (20%) Leave the cares of the world behind (35%) Spontaneous and carefree (30%) In amongst it/where it's all happening (16%) Like one of the locals (20%) Vital, alive (27%) Freedom to be who I want to be (29%)
That is the best place in QLD to...		The Great Barrier Reef (25%) Nature based activities (28%) Casual outdoor dining (11%) Outdoor adventure activities (21%) Awe-inspiring wonders (28%) Tropical islands and resorts (21%) Mingling with people and meeting the locals (11%) Natural World Heritage Sites (25%)

Figure 2 TNQ Visitor Perceptions Summary



5.2. Community Perceptions

Of its 250,000 residents, over half cannot think of anywhere else they would rather live. Over one third of the population benefits from tourism, more than double the Queensland average (38% compared with QLD 16%). Locals like the way the industry is developing (72%) and want tourist numbers to grow (68%).

More TNQ residents agree that tourism enhances their local community (82%), higher than the Queensland average (46%). Agreement among residents on the top three positive outcomes of tourism also remains high:

- Greater cultural diversity (96% in 2013 and 95% in 2010)
- Important economic benefits (95% in 2013 and 91% in 2010)
- Increased regional profile (92% in 2013 and 85% in 2010).

Additionally, there has been a jump in residents agreeing that tourism increases local pride (82% compared with 66% in 2010), and nine in ten (90%) believe festivals and events attract tourists and raise awareness of the region.

8. Tropical North Queensland Brand Health Check 2013 & Brand Health 2013 Presentation, Alan Anderson and Sarah Ogden, NIELSEN & Tourism & Events Queensland, July 2013

9. Tropical North Queensland Social Indicators 2013, Tourism & Events Queensland, 2013

6

COMPETITOR ANALYSIS



This section provides a summary of TNQ's competitive advantages and an outline competitive assessment of the destination.

6.1. Competitive Positioning

TNQ's natural assets and environment, tropical lifestyle and culture, adventure and indigenous culture provides TNQ with its competitive position both nationally and internationally. Significantly the Great Barrier Reef is recognised globally as one of the world's eight wonders and the only location in the world where two world heritage areas meet.

Competition has increased significantly over the past decade, a trend which will continue as the world opens up through access to new and often lower priced destinations.

TNQ will also compete through advantages that align with the CSIRO Megatrends as follows:

- Quality and uniqueness of natural assets;
- Ease and choice of access through Cairns International Airport;
- Quality of the visitor experience and breadth of product;
- Established tourism infrastructure and accessibility of destination and experience;
- Safety and security of country and destination.



6.2. Competitive Assessment

The competitive environment for Tropical North Queensland across domestic and international targets is evolving rapidly.

Just 10 years ago TNQ was competing directly with Whitsundays, Sunshine Coast, Gold Coast and Fiji for share of the domestic sun-seeker. In 2014 things are far more competitive with South-East Asia and the Pacific Islands growing at staggering rates. While perceived lower cost are fuelling much of this growth Australians are become more comfortable travelling through Asia and the desire for cultural experience is ever growing.

The international visitor is also being flooded with new and emerging holiday destinations from all corners of the globe and any nature based destination should be considered a competitor.

10. The Future of Tourism in Queensland, Megatrends creating opportunities and challenges over the coming twenty years, Stefan Hajkowicz, Hannah Cook and Naomi Boughen, CSIRO, 2013

7

WHERE ARE WE NOW?



7.1. Target Markets and Segments

TNQ targets Leisure Holiday as its primary market. Other strong markets include Business Events, Sport and Leisure Events.

Target markets are Brisbane and Regional Queensland (600km radius of Tropical North Queensland), Sydney and Melbourne offer growth opportunity. Psychographic segmentation has been utilised to define current target segments as "Leisure Connectors" in Brisbane and Regional Queensland and "Social Fun-seekers" and "Active Explorers" in Sydney and Melbourne. This segmentation approach is currently under review with the intention to define TNQ segmentation via demographic / life-stage characteristics, i.e.:

- Couples / higher (\$104-\$150K) & upper income segments (\$150K)
- Baby Boomers (50-69y)
- Mid-life (30-49y).

Greater China, Japan, North America, United Kingdom, New Zealand, France and Germany remain key international targets with India, Korea, Singapore supporting.



7.2. TNQ Tourism Visitor Profile

In 2012/13 visitor growth increased by 1% domestic and 12% from international markets. Total visitor expenditure increased from \$2.2 Billion to \$2.6 Billion. China Eastern began direct seasonal flights to Cairns taking TNQ a step closer to its goal of 200,000 Chinese visitors by 2015. Business events were up 7 per cent with TNQ hosting the largest number of international events of all regions in Queensland at 34%. TNQ attracted 22 new sporting events including the:

- Cairns Airport Adventure Festival
- Great Barrier Reef Masters Games in August 2013
- Mountain Bike World Cup in 2014 and 2016; and the
- World Mountain Bike Championships in 2017.

8

WHERE WILL TNQ BE IN 2020?



8.1. Tourism Forecast

Deloitte Access Economics indicated that in TNQ international visitor nights are expected to increase according to both the Tourism Forecast Council (TFC) and industry potential.

The TFC forecasts international visitor nights to be greater than 10 million by the end of this decade, an increase of more than 20% from 2010 levels. The more ambitious industry potential has growth over the decade reaching more than 50%. The nominal increase in total international visitor expenditure according to the industry potential is 155% to 2020, while for TFC forecasts this figure is a more subdued 104%.

The TFC forecasts for domestic overnight tourism suggest a somewhat flat performance over the coming decade, with an increase of less than 140,000 visitor nights over the decade. The industry potential is slightly stronger, anticipating growth of 31% over the same period.

8.2. Megatrends

This CSIRO report identified seven megatrends that will affect the Queensland tourism industry and are likely indicators that will affect people's travel choices, including their propensity to travel and what they desire and expect while travelling. The seven megatrends are outlined in the following diagram:

The development of the TNQ DTP has considered the relevant aspects of the megatrends in the development of the goals, strategies and actions. The implementation of these will assist TNQ in further developing its competitive position to meet consumer expectations.

11. Queensland Tourism - Industry Outlook and Potential to 2020, Deloitte Access Economics August 2012

12. The Future of Tourism in Queensland, Megatrends creating opportunities and challenges over the coming twenty years, Stefan Hajkowicz, Hannah Cook and Naomi Boughen, CSIRO, 2013



MEGATRENDS

THE ORIENT EXPRESS	A NATURAL ADVANTAGE	GREAT EXPECTATIONS	BOLTS FROM THE BLUE	ON THE MOVE	DIGITAL WHISPERS	THE LUCKY COUNTRY
<p>The world economy is shifting from west to east and north to south, creating new markets and new sources of competition.</p>	<p>In a world where ecological habitats are disappearing, the unique natural assets of Queensland will become a stronger drawcard.</p>	<p>Tourists of the future will have expectations for authentic and personalised experiences often involving social interaction.</p>	<p>Climate change and infectious disease outbreaks combined with safety concerns will have increased impact.</p>	<p>People are increasingly mobile - trade, business, events, education and healthcare are causing more people to travel further and more frequently.</p>	<p>People are changing the way they access and trust information in an online world.</p>	<p>Australia and Queensland are increasingly wealthy and have rich cultural and demographic diversity, but for many they are expensive destinations.</p>

Figure 3 CSIRO Tourism Megatrends

8.3. Opportunities and Challenges

Following an analysis of the existing destination planning documents noted in Appendix C, input received from the LTO's and stakeholders and a review of the CSIRO megatrends a SWOT analysis has been undertaken and is included below:

STRENGTHS	WEAKNESSES	CHARACTERISTIC
Tropical North Queensland is home to 5 'Hero Experiences'	Touring	Need sufficient funding and resources to protect and manage key natural assets Increase the development of alternative products to promote the other hero experiences and increase awareness of the diversity that TNQ has to offer
Quality and uniqueness of accessible reef, rainforest and outback	Diversity of the region is not adequately promoted	Need sustainable funding to pro-actively market destination and manage the quality of the assets
Closest access to the Great Barrier Reef	Not widely understood by target markets	Needs to become more widely communicated to targets
Access domestic connections is strong with a good mix of airline carriers and ready access to international airport	Industry reliance on air transport	Ensure region is not reliant on one airline carrier. Expand long-term focus on supporting additional growth through drive, rail and sea.
	International airport underutilised and direct international connectivity under developed - capacity for growth	Significant opportunities to increase international growth, particularly Asia
Quality and breadth of the visitor experience including tours, accommodation and attractions	Slow development of Indigenous tourism product	Focussed support required to develop Indigenous tourism product
	Labour force challenges are already present and are likely to become more severe particularly in remote locations	Need to attract more high quality people into the tourism industry
	Industry reluctant to invest in staff training and career development	Provide support to industry to understand benefits of training & career development
Australia's largest and best managed marine tourism offering	Significant underutilised capacity on reef vessels	Increased visitation required or consolidation of vessels
Mature and well developed tourism infrastructure and industry	Limited supply of quality accommodation outside the coastal corridor	Need to promote investment opportunities and increase visitation
	Large surplus of seasonal hotel capacity in Cairns	Need to increase visitation during shoulder and low seasons and better manage room rates
	TNQ coastal strip is highly reliant on tourism	Need to increase resilience of tourism industry and the overall regional economy
Climate & Infrastructure Sporting, Business, Education provides ideal location for high performance conditioning & training camps for elite athletes	Sporting infrastructure is ad-hoc and condition is inadequate for a number of major events	Sports events strategy to expand to support destination become an all year round tourism, sports events and training destination
Safety and security of country and destination	Larger populated centres may be less attractive to the adventurous backpacker market (too safe)	Promote frontier and adventure opportunities to attract backpackers across TNQ

STRENGTHS	WEAKNESSES	CHARACTERISTIC
Tropical climate & lifestyle	Limited visitation during shoulder seasons	Develop events to fill troughs and extend shoulder seasons
	Access effected by natural weather events and adverse publicity.	Investment in strategic infrastructure and improved communication
Coordinated regional economic development planning undertaken that has broad stakeholder and bi-partisan support	Insufficient resources to effectively implement plans. TNQ has significantly less Econ. Dev. Resources per capita than Sunshine Coast, Gold Coast and Brisbane.	Need sufficient resources to implement economic development plans and regional investment strategy
Broaden opportunity for visitors to connect with Aboriginal and Torres Strait Islander people	Insufficient capacity and product	Targeted capacity building support required

OPPORTUNITIES	THREATS	TREND
Australia's tourism offering of natural, cultural and man-made attractions remain highly regarded and sought after by visitors	Climate change, bio-security and other man made threats that impact the health and quality of the natural asset	Customers are seeking authentic experiences with nature. Increasing awareness and need for industries exposed to climate change risks to develop climate change adaption strategies. In addition, to develop dynamic strategies that responds to short, medium and long-term scenarios, which consider various opportunities and challenges
	Adverse international publicity impacting on reputation of natural assets and destination	Need to demonstrate that assets are being well managed and are in good health
	TNQ does not have a visible enough profile and remains relevant to current and future customer needs	Increasing need to clearly understand target demographics and needs
Develop Touring throughout TNQ to expose diverse regional food, beverage, nature, adventure, culture and communities to fly-drive visitor	Touring not viewed as a priority by TEQ	Visitors want increasing closer and more authentic experiences with the communities in which they visit
	Sufficient investment is not made to develop and promote touring routes and invest in infrastructure	
Increase Events development throughout the region	Seasonal negative summer perception - natural disasters and rain	Increasing growth of the events market Need to host successful events to meet visitors expectations
	Events are poorly delivered through inadequate resources or infrastructure	
Grow direct aviation capacity to Cairns to support increased demand from economic powerhouses in Asia, particularly China	Increased global competition	Need to increase destination awareness in target markets Government support required to attract and maintain regular flights
	Region does not provide the required level of service and experience consistently across the region	Increasing customer service expectations and also the need to thoroughly understand and meet the different cultural needs of the Asian markets
Increasing TNQ's voice and improving business productivity using the high-speed National Broadband Network	NBN roll-out is curtailed and WI-FI and mobile phone coverage is limited and inconsistent across TNQ	Visitors expect quality telecommunications coverage throughout TNQ
Engage and reduce high levels of youth unemployed in the region	Reliance on welfare system and lack of opportunities, support and guidance	Need for targeted and resourced employment & training strategies

8.4. Destination Vision

The vision that has been developed for the TNQ destination has been based on the following attributes:

- Nature is Australia's greatest appeal across all markets
- Tropical North Queensland is home to 3 World Heritage Areas, 2 National Landscapes and the world renowned Great Barrier Reef
- The quality and biodiversity of TNQ's nature experience is the regions sustainable advantage
- The ongoing sustainable management and quality of these assets are critical to the viability of the tourism industry.

The vision for the destination is therefore proposed to be:

The world's best destination to engage with nature

The following provides a broader explanation to support the philosophy behind the vision:

- World's best: Leading + Quality + Authentic
- Engage: Accessibility + Interaction
- Nature: Reef + Rainforest + Outback / 3 World Heritage Areas / 2 National Landscapes / World Wonder





9

TNQ PRIORITIES OVERVIEW



The TNQ DTP been developed from the analysis and understanding of key existing strategic plans, close engagement with the LTO's and local governments, which resulted in a one day workshop on 25 February, and the input of 29 stakeholder organisations.

The key focus of this plan has been designed to:

- Increase the number of overall visitors but with a particular focus on the low and shoulder seasons;
- Increase length of stay;
- Increase expenditure per visitor;
- Increase likelihood of repeat visitation;
- Distribute economic benefit across TNQ;
- Further develop and promote TNQ's five hero experiences.

Due to the scale of the targets the stakeholders also highlighted the need to develop a plan that further developed the capacity of the industry across the whole supply chain.

The TNQ DTP consists of eight key priority themes to focus and drive initiatives to support the tourism

industry moves toward the 2020 targets, which have been categorised into three distinct categories:

- Primary Drivers
- Enabling Drivers; and
- Building the Context.

Primary Drivers: These are the key priority drivers that exhibit the greatest potential to achieve the defined growth targets and are:

- Touring
- Events
- Aviation

Enabling drivers: These are fundamental aspects of sustained focus required to underpin and enable the primary drivers and are:

- Infrastructure & Product Investment
- Digital Leadership
- Quality, Service & Innovation
- Partnerships and Delivery Capability



Building the Context: The context that all stakeholders invest in and derive benefit from is the TNQ Destination. The decision to visit TNQ is created in the minds and hearts of potential customers through a variety of communication sources and stories that are shared about the destination.

The destination image that is supported through destination marketing must be positive, distinctive and compelling to influence the pre-visitation choice process. This positive context is essential to maximise the potential impact of the primary and enabling DTP drivers.

The relationship between all of the priorities and destination vision, which is at the centre of the diagram, is highlighted in the following diagram:

An overview of the intent of each of the priority themes and the associated strategies and actions is outlined in the following sections. The goals, actions, strategies and indicative responsibilities for key stakeholder organisations are summarised in Appendix C. The responsibilities for the delivery of individual actions will need to be agreed with key stakeholder organisations prior to implementing the TNQ DTP.

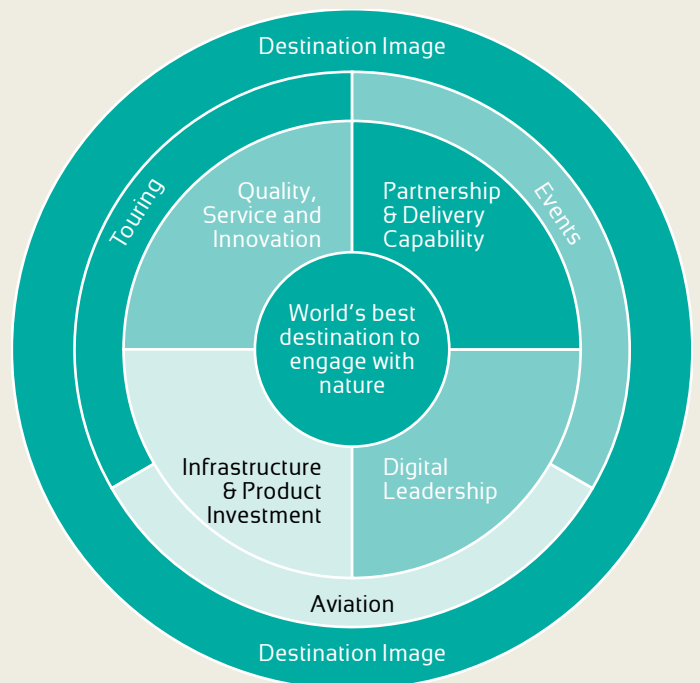


Figure 4: TNQ DTP Priority Themes

9.1. Destination Image

The **goal** of the Destination Image Context Priority is to **optimise economic benefit from domestic and international visitors through aggressive & sustained destination marketing**. This investment is designed to create a positive, distinctive and compelling destination image that can be leveraged by the TNQ tourism industry. Importantly the TNQ destination image provides for the context that defines the focus of the DTP primary and enabling drivers.

TNQ has a natural advantage through its unique natural assets, positioned by the Hero Experiences and is well located to attract more visitors by promoting a balanced portfolio of both national and international markets. To take advantage of the increasingly mobile customers seeking authentic natural habitats, appropriate and consistent investment needs to be made in destination marketing to drive heightened appeal and growth in visitation to meet the 2020 targets.

STRATEGIES	ACTIONS
Achieve growth through investment in shoulder seasons	Attract Business Meetings and Events from Melbourne, Sydney and Brisbane
	Promote the TNQ Events Portfolio with TNQ Touring to intra-region and SEQ
	Target Japan & China to attract visitation during fixed holiday periods that coincides with TNQ shoulder and low season
	Undertake partner marketing with the agriculture industry to attract working backpackers
Achieve growth through investment in repeat visitation	Promote the GBR Great Eight initiative
	Develop initiatives that encourage customer satisfaction and destination advocacy through visitors
	Promote the TNQ Events Portfolio and TNQ Touring to intra-region
Build and invest across a diversified and profitable portfolio of markets and customers	Grow Fly and Stay leisure visitation from Sydney, Melbourne, South East Queensland
	Grow Fly and Stay leisure visitation from New Zealand
	Grow FIT leisure visitation from Greater China and Japan
	Retain market share of leisure travellers from UK, France, Germany, Japan and USA
	Negotiate competitive packaging through interlining marketing agreements with Virgin, Qantas to increase visitation from UK, Europe, China, NZ & USA
	Grow emerging leisure markets of India, Korea and SE Asia
	Re-establish CGBR as Australia's leading backpackers destination
	Undertake partner marketing activity with Study Cairns to grow Education visitation from Singapore, China, Korea and Japan
	Grow Business Incentives from Northern Asia and USA
	Grow a portfolio of Cruise Liner port visitation schedules and Cairns home porting
	Grow superyacht visitation
	Review TNQ Destination name for relevance with target markets and industry
	Showcase the range of TNQ Hero Experiences to increase dispersal of visitors throughout the region
Attract Grey Nomads to TNQ	
Review the role of 'Drive North Queensland' in the marketing of TNQ Touring	

9.2. Touring

The **goal** of the Touring Priority is to **increase expenditure from domestic and international visitors by investing in a whole of destination Touring Experience by increasing length of stay, maximising dispersal of the economic benefits across the region and repeat visitation.** The region has a number of existing touring routes and themed experiences can be further developed and expanded by investing in a whole of destination Touring Experience. This will promote and expose the diversity, quality and richness of TNQ's Hero Experiences, building capacity and capability, which aligns and leverage the Events Priority. This will provide visitors with an extraordinary range of authentic and personalised experiences.

STRATEGIES	ACTIONS
Promote and expose the diversity of TNQ's Hero Experiences through an integrated TNQ Touring Development Strategy and Framework	Establish and engage the TNQ DTP Touring Development Group (refer Partnerships)
	Audit existing touring routes, assets, infrastructure and products
	Identify target markets, priority customers and competitive environment
	Conduct Gap Analysis and Opportunity Identification
	Develop Brand Strategy and Experience Positioning
	Develop touring themes aligned with TNQ hero experiences
	Develop TNQ Touring Development Strategy and Framework
	Develop Infrastructure and Product Investment Plan (refer Infrastructure and Product Investment)
	Develop TNQ Touring Marketing Strategy and Plan (refer Marketing)

9.3. Events

The **goal** of the Events Priority is to **increase expenditure from domestic and international visitors by investing in an enlarged TNQ Events Program**. This will be achieved through attracting increased expenditure from domestic and international visitors during the shoulder season. In addition, to increase length of stay, maximise dispersal of the economic benefits across the region and attract repeat visitation.

An effective Events Strategy that includes wisely positioned sports, lifestyle, cultural and business events is a powerful tool to elevate the profile of the TNQ destination to encourage increased and repeat visitation. Visitors are travelling further and more frequently to fuel their personal interests and self-satisfaction to participate in events within natural settings. This region has developed a successful events program over the last 4 years and has delivered many benefits. This region has the ability to grow this further by investing in an enlarged coordinated TNQ Events Portfolio that also aligns with and leverages the Touring Priority.

STRATEGIES	ACTIONS
Grow shoulder visitation and destination dispersal through the attraction and promotion of sports, lifestyle and cultural events	Develop an integrated TNQ Events Attraction and Development Strategy and Plan
	Identify and support high potential existing events aligned with hero experiences
	Identify and build new events aligned with hero experiences and Touring Strategy
	Develop TNQ Events Marketing Strategy and Plan (refer Marketing)
Grow low season visitation	Explore low season signature event opportunities
Increase visitation by attracting Business Incentive Groups, Meetings and Events	Invest in marketing to attract Business Incentive Groups from North Asia and USA (refer Marketing)
	Invest in a TNQ Seasonal Event Incentive Program
	Advocate growth of the TEQ Subvention program fund
	Strengthen TNQ performance in securing international delegates through the TEQ Subvention program

9.4. Aviation

The **goal** of the Aviation Priority is to **increase expenditure from domestic and international visitors by investing in the maintenance, growth and attraction of aviation services.**

Direct Aviation services are the critical element in the supply equation to grow visitation to TNQ. The region is remotely located from centres of Australian population but well positioned for the growing markets of North and South Asia. The world economy is shifting more and growth in our visitation will increasingly come from the North. The Destination will need to also maintain competitive services to retain traditional markets. People are increasingly more mobile and aviation provides the opportunity to link the majority of our potential markets with TNQ, more frequently.

STRATEGIES	ACTIONS
Grow direct international capacity to Cairns Airport	Grow visitation from UK, Europe, India, China and South East Asia by securing direct flight connections to and from Singapore
	Grow visitation from China by attracting direct flights from China Southern and China Eastern through Shanghai and Guangzhou.
	Grow visitation from China by identifying opportunities for direct flights from secondary Chinese cities
	Grow visitation from China, Japan and Korea by securing charter flights
	Advocate to streamline and further invest in the State Government Aviation Investment Program
	Support the development of new routes through marketing investment - refer Destination Marketing
Secure the TNQ aviation baseline by protecting and maintaining existing airline routes	Align marketing activities to support existing routes and airlines
Grow capacity through Sydney to support increased international and domestic visitation to Cairns	Invest in marketing to grow Sydney visitation (refer Marketing)
	Incentivise domestic aviation carriers from Sydney to increase Cairns capacity
To support the viability of international flights through Cairns by addressing freight and backfill opportunities	Industry to support Cairns Airport Freight Strategy
	Advocate for changes to policy roadblocks concerning freight opportunity
To support the viability of international flights through Cairns by reforming federal airline attraction and operating models	Advocate for regional preferencing in aviation bi-lateral negotiations

9.5. Infrastructure and Product Investment

The **goal** of the Infrastructure and Product Investment Priority is to **secure investment in tourism product, infrastructure and interpretation that enables delivery of the TNQ DTP vision**. This needs to be achieved through protecting and enhancing the quality of TNQ’s natural assets, amplifying TNQ’s Hero Experiences and supporting the development of the Primary Drivers (Touring, Events & Aviation).

Where ecological habitats are disappearing globally, the special and diverse natural assets of TNQ become an even stronger drawcard. To ensure these core assets remain economic drivers for the TNQ destination in the short, medium and long-term it is critical that new investment to TNQ consciously and actively supports the protection and enhancement of the quality of TNQ’s natural assets. This will strongly support TNQ’s reputation, brand and competitive position. Innovative approaches to attracting increased private sector investment and the ‘smarter’ utilisation of scarce government funding to create more benefits and outcomes will be critically important in the development and delivery of the investment strategies. The protection and enhancement of TNQ’s natural assets needs to be a core focus of the investment strategies as well as the creation of local jobs, increased resilience and economic growth.

STRATEGIES	ACTIONS
Innovative and wise allocation of government investment in sustainable public infrastructure and interpretation	Maintain and improve visitor access by investing in select roads, boardwalks, tracks, trails, signage & Rail e.g. Kuranda
	Improve visitor experience by investing in select infrastructure e.g. camp sites, toilets, telecommunication, waste collection and general utilities
	Align public Infrastructure Investment Programs to support the proposed TNQ Events & Touring Strategies
	Leverage existing Local Government Sports Infrastructure Development Plans that aligns and supports target events
	Support implementation of the QPWS Regional Visitor Management Strategy to identify potential private sector investment locations
	Develop 12 new indigenous arts centres in TNQ
Stimulate private sector investment in tourism infrastructure, product development and interpretation	Increase private sector investment by aligning the TNQ Regional Investment Strategy with the needs of the TNQ DTP and supporting its implementation refer Partnerships and Capability (Delivery)
	Attract private sector investment by developing and promoting an investment portfolio to enhance the iconic Hero Experiences
	Support QPWS Voluntourism initiatives that develops emerging tourism opportunities across TNQ
	Advocate for tax and other incentives to encourage refurbishment and renewal of existing assets and products
	Identify opportunities to increase evening activities in major tourism hubs
	Advocate for quality telecommunications coverage throughout TNQ - refer to Digital leadership
Support the development of catalytic tourism infrastructure that will increase the resilience of the TNQ tourism industry and the regional economy	TTNQ’s policy is to support the development of the Aquis Resort development. This will be achieved through active lobbying of local, state and federal Government to secure an additional casino licence for Cairns and the fast tracking of approval process to take advantage of prevailing market conditions in global casino/ integrated resort development
	Provide support to major development proponents in terms of gathering market intelligence and insights to assist in their formulation of business cases for major investment decisions

9.6. Digital Leadership

The **goal** of the Digital Leadership Priority is to **engage visitors through leading digital assets, content management creation and infrastructure enabling delivery of the TNQ DTP vision.**

Digital technology provides an opportunity to increase the presence, awareness and engagement with visitors to TNQ as well as by receiving destination endorsement from trusted third parties. Effective and accessible digital technology allows tourism operators to better target and promote their products and for visitors to share their personal experiences and interaction with TNQ's unique natural assets and people.

STRATEGIES	ACTIONS
Increase destination awareness and engagement online through a widened and stronger digital footprint	Invest in Industry Digital Development and Training
	Invest in growing the volume and quality of content within the ATDW
	Invest in the innovation and development of TNQ digital communication assets
	Invest in the creation, distribution and curation of TNQ Hero Experience digital content
	Invest in digital assets supporting TNQ Hero Experiences and proposed TNQ Touring and Events Strategies
Stimulate global conversation through online relationship development strategies, assets, content creation and initiatives	Engage industry and community in a Global Conversation Program
Enable and stimulate the on holiday gathering and sharing of experience content through investment in technology infrastructure and platforms and content creation practices	Invest in Wi-Fi and 4G services to support existing communication platforms (refer Product and Infrastructure Investment)
	Invest and innovate in customer centred, on the ground experiential technology

9.7. Quality Service and Innovation

The **goal** of the Quality, Service and Innovation Priority is to **empower industry to deliver on the TNQ DTP vision through creating a regional centre of excellence in service and innovation leadership and support.**

To understand and meet the current and anticipated needs of visitors and target markets it is vital that TNQ has access to quality and contemporary information. To support knowledge on customer expectations we need a well prepared, flexible and informed workforce to provide the level of service to enhance the delivery of the hero experiences.

STRATEGIES	ACTIONS
Inform industry and government decision making through the gathering, analysis and dissemination of contemporary knowledge and research	Initiate a whole of TNQ research program to fill data and insight gaps
	Identify a lead organisation responsible for ownership, coordination, analysis and dissemination of research information
Improve the competitiveness of tourism by identifying policy impediments and advocating for policy reform	Improve the competitiveness of TNQ tourism industry by advocating for workplace relations reform by coordinating and liaising with QTIC and other key industry bodies to advocate on behalf of industry
	Assist innovation and new experiences through the processes of identifying red tape, green tape and visa issues and advocate for change
	Increase private sector tourism investment in Cape York by advocating for land tenure reform
Skill industry to delivery on the TNQ DTP Vision through the delivery of industry training and education programs	Increase supply of labour, skills and Indigenous participation by supporting the implementation of the FNQ tourism employment plan
	Coordinate and liaise with QTIC and other stakeholder bodies to Identify workforce priorities to meet the needs of industry and support relevant advocacy initiatives
	Deliver a competitive customer service program
	Facilitate the management and delivery of China Ready programs within TNQ
	Enrich the visitor experience through the delivery of nature and culture interpretation training programs
	Natural Asset Management training and research programs need to be aligned to meet the needs of the industry and consumer
Further develop TNQ Indigenous product to deliver as a recognised destination hero experience	Increase the profile of existing and proposed tourism product in the region that leverages off drive and events priorities e.g. 12 new Indigenous Arts Centres proposed by Arts Qld
	Undertake a coordinated approach to engage with indigenous groups and key agencies to implement potential business development opportunities

9.8. Partnerships and Delivery Capability

The **goal** of the Partnerships and Delivery Capability Priority is to **develop a united regional commitment that delivers the TNQ DTP outcomes.**

To achieve the 2020 growth targets of increasing tourism expenditure in TNQ by an additional \$2 Billion (75% increase) whilst also sustainably managing the natural assets that the industry relies upon. Developing partnerships across multiple key stakeholder organisations, building capacity, developing a shared vision and efficiently using resources will be critical to the successful delivery of the TNQ DTP.

STRATEGIES	ACTIONS
To secure sufficient funding and resources to successfully deliver the TNQ DTP	Identify an effective governance and delivery framework and secure the resources to enable the successful delivery of the TNQ DTP, which also supports the development of other TNQ industries in alignment with the TNQ Regional Economic Plan
	Secure sufficient investment for undertaking destination marketing by further developing partnership and relationships with Qld Government Agencies (Department of Tourism, Major Events, Small Business and the Commonwealth Games, Tourism Events Qld & Arts Qld) and Local Governments to provide a coordinated approach across LGA's & LTO's
	Identify the new and existing resources and partnerships that are required to deliver the TNQ DTP
	Secure the future of TNQ's economic base by gaining Government recognition and understanding that TNQ's natural assets are the core economic driver for the region and demands a higher investment
	Review the size of the RTO geographic coverage and the purpose, operating and governance arrangements of and between the RTO and LTO's
	Strengthen industry stability and capacity through a sustainable RTO/LTO funding and operating model
	Implement a communication and engagement plan with local government and other industry sectors to maintain and develop support for a strong and sustainable tourism sector
Align TNQ DTP with the TNQ Regional Economic Plan	Strengthen the resilience of the regional economy by actively supporting and aligning the TNQ DTP with the implementation of the TNQ Regional Economic Plan
	To drive and align priorities and leverage available resources in partnership with the other industry sectors e.g. education, agricultural, marine and retail industries
	Ensure tourism infrastructure priorities align with TNQ Regional Infrastructure Plan & Priorities.
Preserve and protect the reputation, quality and status of the Great Barrier Reef, Wet Tropics and industry as a leading sustainable tourism destination.	Establishing formal partnerships and collaboration with GBRMPA, WTMA & QPWS to develop and implement the TNQ DTP
	Develop tools that help communicate the health and wellbeing of the regional brand from attempts to undermine the quality of the natural assets
	Government need to adopt accounting practices that adequately values the positive externality benefits, the income that these assets generate and the investment that is required to adequately manage the quality of the assets in TNQ to world class standards
	Identify innovative user based funding models that may be used to invest in managing the natural assets
	Enriched visitor experience through the provision of interpretation and natural asset management programs that showcases the iconic experiences - refer to Quality, Service and Innovation section
	Provide more targeted information to support the tourism industry improve the health and protection of the natural assets
Undertake research to better manage the sustainability of TNQ's natural assets	

STRATEGIES	ACTIONS
Prepare tourism industry for 'anticipatable bolt from the blue' events	Develop an 'emergency' fund for marketing or PR purposes to counter any potential negative natural, man-made or economic disaster that impacts or has the potential to impact the region
	Engage with existing Regional Disaster Management Coordination Group to provide accurate advice to the tourism network to protect the reputation of the region
	Start developing a long-term strategy to mitigate the region's exposure to peak oil and climate change adaption
Align with Destination Success	Start developing a 20 year planning horizon that will consider the longer-term challenges and opportunities that are emerging for the TNQ industry and community, consider various scenarios and develop dynamic strategies to ensure TNQ remains relevant to current and future customer needs.



10

TNQ GROWTH POTENTIAL FORECAST



10.1. Tourism Growth Scenarios

Preliminary indicative TNQ tourism growth modelling has been undertaken based on the identified priorities using three different scenarios, which are:

- **Organic Growth:** Applying the Tourism Research Australia (TRA) 2020 forecasts in visitors by market with a retained market share from TNQ. Visitor forecasts are then multiplied by average visitor spend per trip to estimate expenditure.
- **Growth Target:** Applying the above organic scenario with increased market share for identified target markets. Different market share forecasts have been used for each target market dependent on the estimated potential for growth
- **Growth Potential Target:** Is the stretch target to achieve the Queensland Government 2020 potential TNQ targets and applies the above Growth Target scenario with an estimated increased visitor spend.

This model has been developed on the following assumptions:

- The standard expenditure per visitor has been applied consistently for each market from the International Visitor Survey (IVS) and National Visitor Survey (NVS)
- In reality different markets have different spending behaviours therefore the application of an average rate will not accurately portray the anticipated expenditure from each market
- That the strategies and actions identified in this plan must be sufficiently resourced to drive growth.

Additional assumptions that have been used to develop the forecast model are included in the forecast model, which is included in Appendix C.

The following diagram provides a visual representation of the potential growth markets and targets for TNQ to achieve the 2020 growth targets.



MARKET PRIORITIES 2020

EXPENDITURE	Slow Growth	Average Growth	Strong Growth
Large > \$300M		TNQ Other QLD	China
Medium \$200M - \$300M		North America Brisbane Japan UK	Sydney Melbourne
Small \$100M - \$200M		NSW/VIC New Zealand Germany	
Developing \$20M - \$100M	Italy Adelaide Perth	France Scandi India Korea	

Figure 5 2020 Growth Market Targets

Based on three different scenarios the following is the estimated forecast growth in combined domestic and international TNQ tourism expenditure from \$2.6 Billion in 2014 for the three different scenarios:

Organic Growth: To \$3.93 Billion in 2020. Under this scenario the international market is forecast to grow from \$885 Million to \$1.83 Billion and domestic market from \$1.72 Billion to \$2.10 Billion.

Growth Target: To \$4.31 Billion in 2020. Under this scenario the international market is forecast to grow from \$885 Million to \$1.99 Billion and domestic market from \$1.72 Billion to \$2.33 Billion.

Growth Potential Target: To \$4.63 Billion in 2020. Under this scenario the international market is forecast to grow from \$885 Million to \$2.19 Billion and domestic market from \$1.72 Billion to \$2.44 Billion.

Each of the three scenarios are summarised in the following table and graph:

SCENARIO	2012/13 EXPENDITURE	2020 ORGANIC GROWTH (TRA*)	2020 GROWTH PROJECTION TTNQ	2020 GROWTH TARGET QLD GOV	% GROWTH
International	\$885,000,000	\$1,837,001,872	\$1,986,096,245	\$2,185,641,045	147%
Domestic	\$1,727,250,000	\$2,101,611,640	\$2,334,763,644	\$2,444,025,982	41%
Potential Total Visitor Expenditure	\$2,612,250,000	\$3,938,613,512	\$4,320,859,888	\$4,629,667,027	77%
Forecast Growth		\$1,326,363,512	\$1,708,609,888	\$2,017,417,027	

Figure 6 Table Showing 3 Forecast Scenarios of Total Visitor Expenditure Growth Compared to 2012/13 Expenditure

* Tourism Research Australia

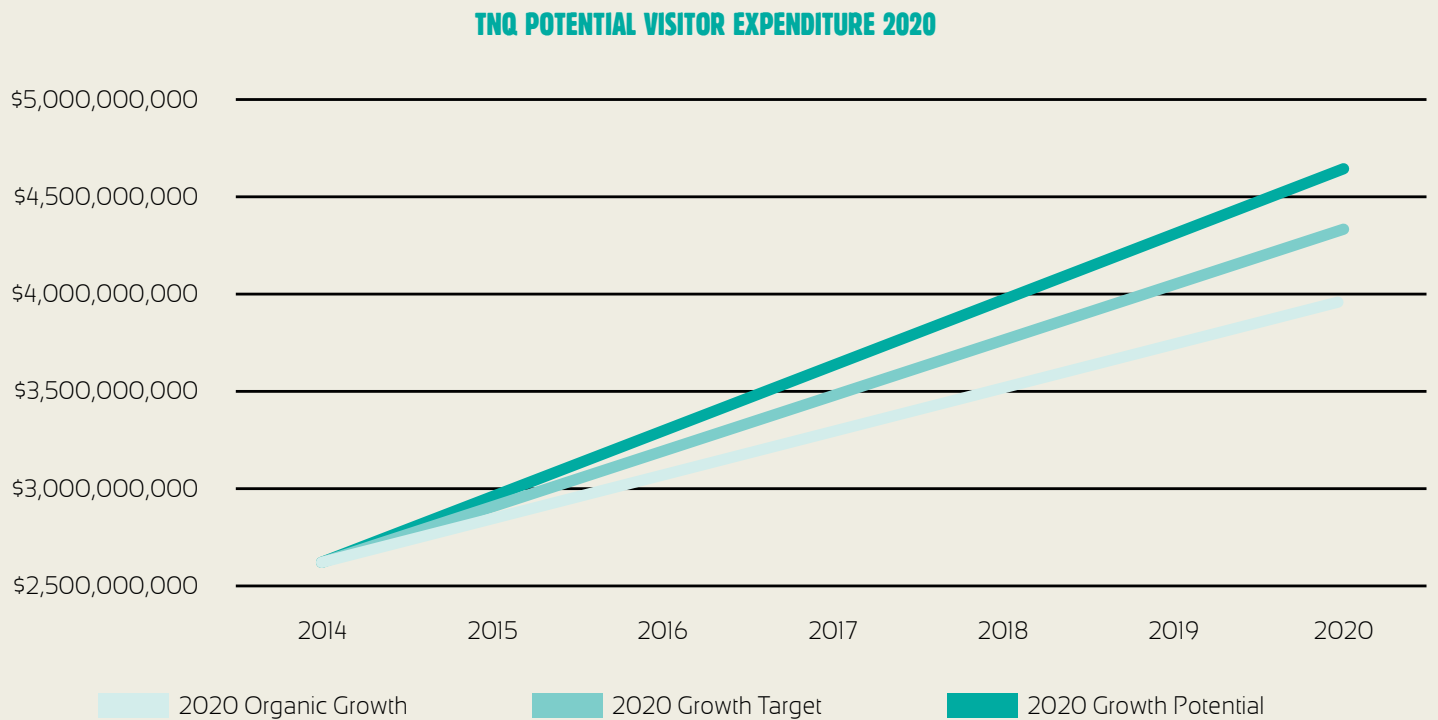


Figure 7 Graph Showing 3 Forecast Scenarios of Total Visitor Expenditure Growth

10.2. Regional Economic Impact Growth

It has been estimated that if the \$2Bn growth target was reached that approximately 12,000 additional jobs would be created in the tourism industry. Furthermore, an additional flow-on economic impact could generate an additional \$2.1Bn in economic growth and 8,000 jobs in other sectors of the TNQ regional economy. This would grow the overall regional economy by approximately 40% by 2020, an overall annualised average grow of 6.7%. This is compared to Queensland growth forecasts of 3% per annum over the next two years and 6% in 2015-16. Comparatively, the average economic growth of Australia has been approximately 3.5% over the last 40 years.



11

PRIORITY ALIGNMENT BY PRECINCT



Each of the priorities have been developed to capitalise on the competitive strengths of TNQ and maximise the appeal of the destination to visitors. The following table outlines how each of the priorities relate to each LTO precinct across TNQ:

	PRIORITY THEMES	Cairns & Beaches	Cape Tribulation & Daintree	Cape York	Casowary Coast	Gulf Savannah	Port Douglas	Tablelands
CONTEXT	Destination Marketing	✓	✓	✓	✓	✓	✓	✓
DRIVERS	Events	✓	✓	✓	✓	✓	✓	✓
	Touring	✓	✓	✓	✓	✓	✓	✓
	Aviation	✓	✓	✓	✓	✓	✓	✓
ENABLERS	Quality, Service and Innovation	✓	✓	✓	✓	✓	✓	✓
	Digital Leadership	✓	✓	✓	✓	✓	✓	✓
	Partnership and Delivery Capability	✓	✓	✓	✓	✓	✓	✓
	Infrastructure and Product Investment	✓	✓	✓	✓	✓	✓	✓

Figure 8 - TNQ Priority Alignment Table

12

POTENTIAL IMPLEMENTATION FRAMEWORK



12.1. Program Management Approach

There has been some major regional development planning initiatives that have been undertaken in the last 15 years within TNQ including the:

- FNQ 2010 and FNQ 2031 Regional Plans
- Regional Development Australia Far North Queensland & Torres Strait Roadmap; and the
- Tropical North Queensland Regional Economic Plan (TNQREP), which was coordinated and developed by Advance Cairns and endorsed by the Queensland Premier.

The development of the plans have been generally adequately resourced and coordinated. However, it could be argued that these plans have not realised the maximum benefits from the planning process due to the limited resources allocated to the implementation of these plans. Both the RDA Roadmap and the TNQREP relied heavily on a decentralised approach for the implementation that required other organisations and agencies to deliver particular strategies and actions.

This issue has been particularly compounded due to the limited resources allocated to economic development in this region compared to other comparable regions such as the Sunshine Coast, Gold Coast and Brisbane and the reductions to the public sector in recent years.

The implementation of the TNQ DTP is a significant exciting opportunity and TNQ has strongly indicated that it is ambitious and would like to achieve the \$2Bn growth targets. This will require major change and has the potential to involve complexity, risk, many interdependencies to manage, and conflicting priorities to resolve. Experience shows that organisations are likely to fail to deliver change successfully where:

- There is insufficient board-level support
- Leadership is weak
- There are unrealistic expectations of the organizational capacity and capability to change

- There is insufficient focus on benefits
- There is no real picture of the future capability
- There is a poorly defined or poorly communicated vision
- The organisation fails to change culture
- There is insufficient engagement of stakeholders.

Adopting a program management approach can help organisations avoid these pitfalls and achieve their goals

. Utilising an approach such as Managing Successful Programs (MSP), which has been widely adopted by the Queensland Government and other governments around the world to successfully implement major programs, could provide a structured framework to manage the implementation of the TNQ DTP.

MSP defines the roles and responsibilities of all who need to form part of the leadership of a program. Effective leadership of a program is achieved through informed decision-making and a flexible management regime. The key roles involved are:

- Sponsoring Group
- Senior Responsible Owner
- Programme Manager
- Business Change Managers
- Program Office.

By learning the lessons from past major TNQ planning initiatives, adopting a different approach to the implementation of the TNQ DTP and securing sufficient resources there is increased likelihood that the intended benefits and outcomes of the TNQ DTP will be realised.

If this approach is adopted it is proposed that the:

- Sponsoring Group should be the TTNQ Board
- Senior Responsible Owner should be the TTNQ/TEQ Partnership Development Manager

- Programme Manager and Business Change Managers could be resources that are either employed for particular periods during the implementation of the TNQ DTP and/or seconded from other key stakeholder organisations such as Queensland Parks & Wildlife, Department of State Development Infrastructure & Planning, Advance Cairns, RDA FNQ & TS, Department of Transport and Main Roads, GBRMPA, WTMA, FNQROC, Local Government staff, Reef & Rainforest Research Centre, Alliance for Sustainable Tourism etc.

- That a program management office (PMO) is established in TTNQ that has the above personnel co-located in one team for the length of the program. The resourcing of the PMO will fluctuate during the implementation period dependant on the focus of the priorities at the time and the required resources.

14. <http://www.msp-officialsite.com/AboutMSP/WhatsMSP.aspx>

12.2. Reporting and Review Process

An indicative reporting and review framework has been developed and is included in Appendix D, with governance and reporting structure as proposed below for consideration in the implementation of the TNQ DTP:

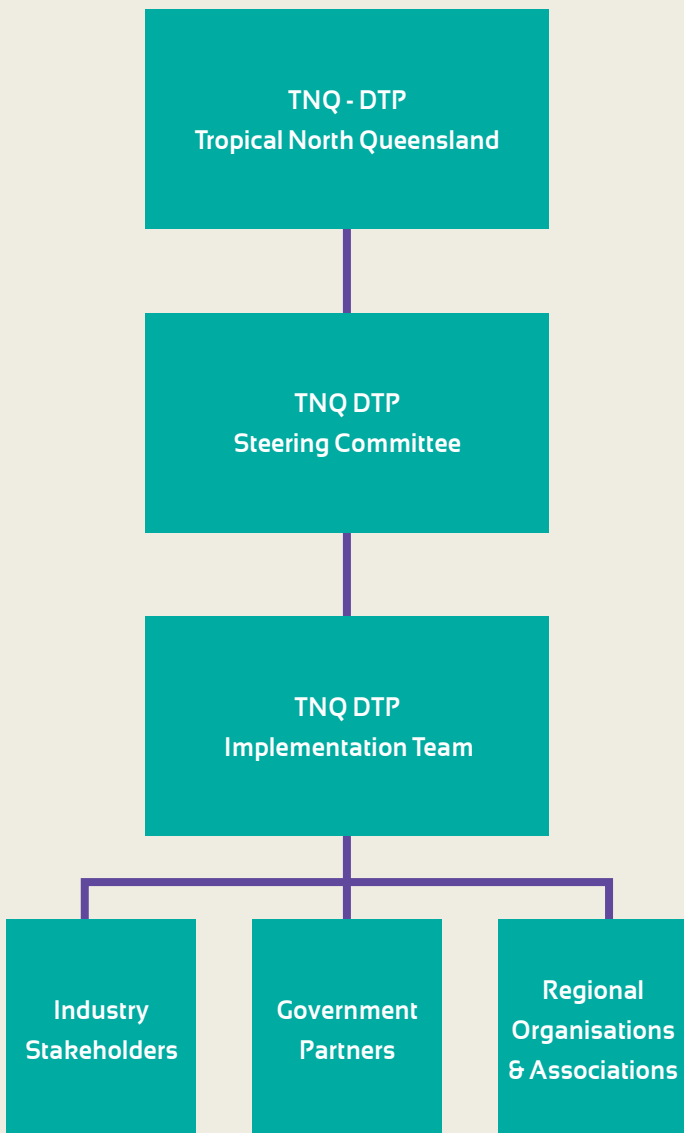


Figure 9 Proposed Reporting Structure

12.3. Sources of Potential Resources for TNQ DTP Implementation

To move from organic growth to a 75% growth and \$2 Billion in additional tourism expenditure in TNQ within 6 years will require significant investment and stronger coordination and alignment of available existing resources.

The additional investment can be provided through three key channels, which are the:

- Government
- Tourism Industry
- Consumer

The Queensland Government has shown a strong commitment to implementing the TNQ DTP. However, it is unlikely that here will be significant additional investment from either the Queensland or Australian Governments to assist realise this plan due to current fiscal policies. Consequently, it is vital that any government investment that is currently planned for the region is evaluated and potentially re-allocated for the purposes of the TNQ DTP, where it can be demonstrated that the TNQ DTP outcomes can provide increased return on investment and community benefits.

Government has also shown a strong commitment to align the planning and priorities for its agencies with the needs of the region and the TNQ DTP. There could be the potential for government agencies to provide secondments of key resources to directly support the delivery of key strategies and actions.

Furthermore, stronger support and investment will also be required from local governments in the region particularly with regard to investing in destination marketing and aligning capital works programs with the touring and events strategies.

The purpose and governance models associated with the structure of the RTO and LTOs should also be reviewed and aligned to the TNQ DTP to ensure the most effective use of resources and industry investment.

Exploring and identifying other models to increase revenue from the consumer should be considered. There are also a number of major catalytic tourism infrastructure projects planned for the region. Any royalties, levies, taxes or duties that need to be paid by the owners and operators of these development should be predominately directed to fund community infrastructure, services and the implementation of the TNQ DTP and broader regional development initiatives.

12.4. Natural Asset Management

In many cases the region's natural assets are currently seen as liabilities that drain large amounts of funds from the public purse. Furthermore, investment in the management of these assets is thinly distributed across Queensland and is not strategically targeted. Government should consider adopting policies and accounting practices that adequately values the positive externality benefits of the natural assets. Furthermore, this approach should consider the income that these assets generate and target the investment that is required to adequately manage the quality of these assets to world class standards. Identifying and considering other innovative funding models, such as user based models could also be considered as discussed above.

The tourism industry also has a major role in ensuring that these assets are sustainably managed for current and future generations. Training and research programs need to be aligned to meet the needs of the industry and evolving expectations of the consumer if this region is to authentically demonstrate that the TNQ DTP vision is being delivered.



13

CONCLUSION



The TNQ tourism industry and community has the desire, ambition and capacity to further develop its reputation of being an innovative and entrepreneurial tourism destination. It is clear that the region's competitive advantage is based on the current and continued health of TNQ's natural assets. This has been clearly defined in the new TNQ tourism industry vision:

“The world's best destination to engage with nature.”

The current perceptions of the region by potential consumers is that TNQ's offering is primarily related to the reef and rainforest and that this is concentrated to the coastal hubs of Cairns, Northern Beaches, Port Douglas, Daintree, Cape Tribulation, Daintree, Mission Beach and the Atherton Tablelands. TNQ is the largest and most diverse geographical region in Queensland and has significant potential to grow and further develop tourism across TNQ.

TNQ has five hero experiences and for the tourism industry to grow, and for the benefits to be distributed across TNQ, it is vital that the strengths of these assets are leveraged and communicated to broaden the understanding and appeal of the destination. This can be achieved by adopting and implementing the eight priority themes identified in the TNQ DTP.

To implement the TNQ DTP it has been highlighted that innovative approaches need to be adopted to secure the investment, partnerships, capability and infrastructure to ensure that TNQ's:

- Tourism industry remains a viable and relevant industry that meets and anticipates the needs of current and future consumers;
- DTP is sufficiently resourced and implemented to achieve the \$2Bn growth targets;



- Natural assets are protected, enhanced and continue to be managed to world class standards. Furthermore, pro-active steps are taken to anticipate, respond and adapt to key challenges such as climate change, bio-security and other key factors that may affect the quality of the assets.

It has been estimated that by achieving \$2Bn growth in the TNQ tourism industry could create an additional 12,000 tourism jobs. It is anticipated that there will be a further flow-on economic impact that could generate an additional \$2.1Bn in economic growth and a further 8,000 jobs across other industry sectors. To build on the economic development initiatives that have been undertaken in recent years to increase the resilience of the regional economy and to leverage available resources and outcomes, the implementation of the TNQ DTP should be integrated with the delivery of the TNQ REP and RDA Roadmap.

LIST OF TNQ DTP STAKEHOLDERS CONSULTED

Stakeholder Organisation
TTNQ
Tourism Events Queensland
Tropical Tablelands Tourism
Tourism Port Douglas & Daintree
Tropical Coast Tourism
Tourism Cape York
Savannah Way
Australian Marine Tourism Operators
Australian Hotels Association (Cairns Chapter) & Shangri-La Cairns
Alliance for Sustainable Tourism Operators (TNQ)
Cairns Convention Centre
Cairns Regional Council
Cassowary Coast Regional Council
Etheridge Shire Council
Far North Queensland Regional organisation Councils
Advance Cairns
Regional Development Australia FNQ & TS
Ports North (Port Authority)
Queensland Tourism Industry Council
Cairns Airport
Great Barrier Reef Marine Park Authority
Wet Tropics Management Authority
Queensland Parks & Wildlife Service
Department of State Development Infrastructure & Planning
Department of Transport & Main Roads (FNQ)
TNQ TAFE
Office of Indigenous Affairs (Cairns Office), Dept. of Prime Minister & Cabinet
Member for Cairns
Department of Arts



APPENDIX B

DESTINATION SUCCESS ALIGNMENT

The following six key themes are outlined in Destination Success:

1. Build strong partnerships
2. Preserve our nature and culture
3. Deliver quality, great service and Innovation
4. Target a balanced portfolio of markets
5. Offer iconic experiences
6. Grow investment and access

The following table outlines how and where the TNQ DTP aligns with Destination Success:

TNQ Context Priority	TNQ Strategies	DS Strategy Alignment
Destination	Achieve growth through investment in shoulder seasons	1,4,5
	Achieve growth through investment in repeat visitation	5,6
	Build and invest across a diversified and profitable portfolio of markets and customers	1,4,5
	Showcase the range of TNQ Hero Experiences to increase dispersal of visitors throughout the region	1,2,3,4,5,6
TNQ Driving Priority	TNQ Strategies	DS Strategy Alignment
Touring	Promote and expose the diversity of TNQ's Hero Experiences through an integrated TNQ Touring Development Strategy and Framework	1,2,3,4,5,6
Events	Grow shoulder visitation and destination dispersal through the attraction and promotion of sports, lifestyle and cultural events	1,4,5,6
	Grow low season visitation	
	Increase visitation by attracting Business Incentive Groups, Meetings and Events	4,6
Aviation	Grow direct international capacity to Cairns Airport	1,4,6
	Secure the TNQ aviation baseline by protecting and maintaining existing airline routes	1,4,6
	Grow capacity through Sydney to support increased international and domestic visitation to Cairns	1,4,6
	To support the viability of international flights through Cairns by addressing freight and backfill opportunities	1,4,6
	To support the viability of international flights through Cairns by reforming federal airline attraction and operating models	1,4,6



TNQ Enabling Priority	TNQ Strategies	DS Strategy Alignment
Infrastructure & Product Investment	Amplify TNQ Hero Experiences through investment in sustainable public infrastructure	1,2,3,4,5,6
	Stimulate private sector investment in tourism infrastructure and product development aligned with TNQ Hero Experiences	1,4,5,6
	Support the development of catalytic tourism infrastructure that will increase the resilience of the TNQ tourism industry and the regional economy	1,4,5,6
Digital Leadership	Increase destination awareness and engagement online through a widened and stronger digital footprint	1,3,4,5,6
	Stimulate global conversation through online relationship development strategies, assets and initiatives	1,3,4,5,6
	Enable and stimulate the on holiday gathering and sharing of experience content through investment in technology infrastructure and platforms	2,3,5,6
Quality, Service & Innovation	Inform industry and government decision making through the gathering, analysis and dissemination of contemporary knowledge and research	1,2,3,4,5,6
	Improve the competitiveness of tourism by identifying policy impediments and advocating for policy reform	1,3
	Skill industry to delivery on the TNQ DTP Vision through the delivery of industry training and education programs	1,2,3,5
	Further develop TNQ Indigenous product to deliver as a recognised destination hero experience	1,2,3,5
Partnerships and Delivery Capability	To secure sufficient funding and resources to successfully deliver the TNQ DTP	1,2,3,4,5,6
	Align TNQ DTP with the TNQ Regional Economic Plan	1,2,4,6
	Preserve and protect the reputation, quality and status of the Great Barrier Reef, Wet Tropics and industry as a leading sustainable tourism destination.	1,2
	Prepare tourism industry for 'anticipatable bolt from the blue' events	1
	Align with Destination Success	1



GOALS, STRATEGIES, ACTIONS & PRELIMINARY ORGANISATIONAL RESPONSIBILITIES

TNQ DTP Priorities: Drivers

Drivers	Priority Goals	Strategies	Actions
Touring	<p>Increase expenditure from domestic and international visitors by investing in a whole of destination Touring Experience</p> <p>Achieve growth through investment in repeat visitation</p> <p>Build and invest across a diversified and profitable portfolio of markets and customers</p>	<p>Promote and expose the diversity of TNQ's Hero Experiences through an integrated TNQ Touring Development Strategy and Framework</p>	Establish and engage the TNQ DTP Touring Development Group (refer Partnerships)
			Audit existing touring routes, assets, infrastructure and products
			Identify target markets, priority customers and competitive environment
			Conduct Gap Analysis and Opportunity Identification
			Develop Brand Strategy and Experience Positioning
			Develop touring themes aligned with TNQ hero experiences
			Develop TNQ Touring Development Strategy and Framework
			Develop Infrastructure and Product Investment Plan (refer Infrastructure and Product Investment)
Develop TNQ Touring Marketing Strategy and Plan (refer Marketing)			
Events	<p>Increase expenditure from domestic and international visitors by investing in an enlarged TNQ Events Program</p>	<p>Grow shoulder visitation and destination dispersal through the attraction and promotion of sports, lifestyle and cultural events</p>	Develop an integrated TNQ Events Attraction and Development Strategy and Plan
			Identify and support high potential existing events aligned with hero experiences
			Identify and build new events aligned with hero experiences and Touring Strategy
			Develop TNQ Events Marketing Strategy and Plan (refer Marketing)
		Grow low season visitation	Explore low season signature event opportunities
		<p>Increase visitation by attracting Business Incentive Groups, Meetings and Events</p>	Invest in marketing to attract Business Incentive Groups from North Asia and USA (refer Marketing)
			Invest in a TNQ Seasonal Event Incentive Program
Advocate growth of the TEQ Subvention program fund			
		Strengthen TNQ performance in securing international delegates through the TEQ Subvention program	



Drivers	Priority Goals	Strategies	Actions
Aviation	Increase expenditure from domestic and international visitors by investing in the maintenance, growth and attraction of aviation services	Grow direct international capacity to Cairns Airport	Grow visitation from UK, Europe, India, China and South East Asia by securing direct flight connections to and from Singapore
			Grow visitation from China by attracting direct flights from China Southern and China Eastern through Shanghai and Guangzhou.
			Grow visitation from China by identifying opportunities for direct flights from secondary Chinese cities
			Grow visitation from China, Japan and Korea by securing charter flights
			Advocate to streamline and further invest in the State Government Aviation Investment Program
			Support the development of new routes through marketing investment - refer Marketing
		Secure the TNQ aviation baseline by protecting and maintaining existing airline routes	Align marketing activities to support existing routes and airlines
		Grow capacity through Sydney to support increased international and domestic visitation to Cairns	Invest in marketing to grow Sydney visitation (refer Marketing)
			Incentivise domestic aviation carriers from Sydney to increase Cairns capacity
		To support the viability of international flights through Cairns by addressing freight and backfill opportunities	Industry to support Cairns Airport Freight Strategy
			Advocate for changes to policy roadblocks concerning freight opportunity
		To support the viability of international flights through Cairns by reforming federal airline attraction and operating models	Advocate for regional preferencing in aviation bi-lateral negotiations

Drivers	Priority Goals	Strategies	Actions
Destination Marketing	Optimise economic benefit from domestic and international visitors through aggressive & sustained destination marketing to create a positive, distinctive and compelling destination image that can be leveraged by the TNQ tourism industry.	Achieve growth through investment in shoulder seasons	Attract Business Meetings and Events from Melbourne, Sydney and Brisbane
		Achieve growth through investment in repeat visitation	Promote the TNQ Events Portfolio with TNQ Touring to intra-region and SEQ
			Target Japan & China to attract visitation during fixed holiday periods that coincides with TNQ shoulder and low season
			Undertake partner marketing with the agriculture industry to attract working backpackers
		Build and invest across a diversified and profitable portfolio of markets and customers	Promote the GBR Great Eight initiative
			Develop initiatives that encourage customer satisfaction and destination advocacy through visitors
			Promote the TNQ Events Portfolio and TNQ Touring to intra-region
			Grow Fly and Stay leisure visitation from Sydney, Melbourne, South East Queensland
			Grow Fly and Stay leisure visitation from New Zealand
			Grow FIT leisure visitation from Greater China and Japan
			Retain market share of leisure travellers from UK, France, Germany, Japan and USA
			Negotiate competitive packaging through interlining marketing agreements with Virgin, Qantas to increase visitation from UK, Europe, China, NZ & USA
			Grow emerging leisure markets of India, Korea and SE Asia
			Re-establish CGBR as Australia's leading backpackers destination
			Undertake partner marketing activity with Study Cairns to grow Education visitation from Singapore, China, Korea and Japan
			Grow Business Incentives from Northern Asia and USA
			Grow a portfolio of Cruise Liner port visitation schedules and Cairns home porting
		Grow superyacht visitation	
		Review TNQ Destination name for relevance with target markets and industry	
		Showcase the range of TNQ Hero Experiences to increase dispersal of visitors throughout the region	Grow TNQ Touring participation from Fly and Stay visitors
Attract Grey Nomads to TNQ			
Review the role of 'Drive North Queensland' in the marketing of TNQ Touring			

TNQ DTP Priorities: Enablers

Drivers	Priority Goals	Strategies	Actions		
Infrastructure & Product Investment	To invest in product and infrastructure that enables delivery of the TNQ DTP vision	Amplify TNQ Hero Experiences through investment in sustainable public infrastructure	Maintain and improve visitor access by investing in select roads, boardwalks, tracks, trails, signage & Rail e.g. Kuranda		
			Improve visitor experience by investing in select infrastructure e.g. camp sites, toilets, telecommunication, waste collection and general utilities		
			Align public Infrastructure Investment Programs to support the proposed TNQ Events & Touring Strategies		
			Leverage existing Local Government Sports Infrastructure Development Plans that aligns and supports target events		
			Support implementation of the QPWS Regional Visitor Management Strategy to identify potential private sector investment locations		
			Stimulate private sector investment in tourism infrastructure and product development aligned with TNQ Hero Experiences	Increase private sector investment by aligning the TNQ Regional Investment Strategy with the needs of the TNQ DTP and supporting its implementation refer Partnerships and Capability (Delivery)	
				Attract private sector investment by developing and promoting an investment portfolio to enhance the iconic Hero Experiences	
		Support QPWS Voluntourism initiatives that develops emerging tourism opportunities across TNQ			
		Advocate for tax and other incentives to encourage refurbishment and renewal of existing assets and products			
		Identify opportunities to increase evening activities in major tourism hubs			
		Advocate for quality telecommunications coverage throughout TNQ - refer to Digital leadership			
		Digital Leadership		To engage visitors through leading digital assets, content management creation and infrastructure enabling delivery of the TNQ DTP vision	Increase destination awareness and engagement online through a widened and stronger digital footprint
			Invest in growing the volume and quality of content within the ATDW		
			Invest in the innovation and development of TNQ digital communication assets		
Invest in the creation, distribution and curation of TNQ Hero Experience digital content					
Invest in digital assets supporting TNQ Hero Experiences and proposed TNQ Touring and Events Strategies					

Drivers	Priority Goals	Strategies	Actions
Digital Leadership	To engage visitors through leading digital assets, content management creation and infrastructure enabling delivery of the TNQ DTP vision	Stimulate global conversation through online relationship development strategies, assets, content creation and initiatives	Engage industry and community in a Global Conversation Program
		Enable and stimulate the on holiday gathering and sharing of experience content through investment in technology infrastructure and platforms and content creation practices	Invest in Wi-Fi and 4G services to support existing communication platforms (refer Product and Infrastructure Investment)
			Invest and innovate in customer centred, on the ground experiential technology
Quality, Service & Innovation	Empowering industry to deliver on the TNQ DTP vision through creating a regional centre of excellence in service and innovation leadership and support	Inform industry and government decision making through the gathering, analysis and dissemination of contemporary knowledge and research	Identify a lead organisation responsible for ownership, coordination, analysis and dissemination of research information
			Initiate a whole of TNQ research program to fill data and insight gaps
		Improve the competitiveness of tourism by identifying policy impediments and advocating for policy reform	Improve the competitiveness of TNQ tourism industry by advocating for workplace relations reform by coordinating and liaising with QTIC and other key industry bodies to advocate on behalf of industry
			Assist innovation and new experiences through the processes of identifying red tape, green tape and visa issues and advocate for change
			Increase private sector tourism investment in Cape York by advocating for land tenure reform
		Skill industry to delivery on the TNQ DTP Vision through the delivery of industry training and education programs	Increase supply of labour, skills and Indigenous participation by supporting the implementation of the FNQ tourism employment plan
			Coordinate and liaise with QTIC and other stakeholder bodies to Identify workforce priorities to meet the needs of industry and support relevant advocacy initiatives
			Deliver a competitive customer service program
			Facilitate the management and delivery of China Ready programs within TNQ
			Enrich the visitor experience through the delivery of nature and culture interpretation training programs
		Further develop TNQ Indigenous product to deliver as a recognised destination hero experience	Increase the profile of existing tourism product in the region that leverages off drive and events priorities.
			Undertake a coordinated approach to engage with indigenous groups and key agencies to implement potential business development opportunities

Drivers	Priority Goals	Strategies	Actions
Partnerships and Delivery Capability	To develop a united regional commitment that delivers the TNQ DTP	To secure sufficient funding and resources to successfully deliver the TNQ DTP	Identify an effective governance and delivery framework and secure the resources to enable the successful delivery of the TNQ DTP, which also supports the development of other TNQ industries in alignment with the TNQ Regional Economic Plan
			Secure sufficient investment for undertaking destination marketing by further developing partnership and relationships with Qld Government Agencies (Department of Tourism, Major Events, Small Business and the Commonwealth Games and Tourism Events Qld) and Local Governments to provide a coordinated approach across LGA's & LTO's
			Identify the new and existing resources and partnerships that are required to deliver the TNQ DTP
			Secure the future of TNQ's economic base by gaining Government recognition and understanding that TNQ's natural assets are the core economic driver for the region and demands a higher investment
			Review the size of the RTO geographic coverage and the purpose, operating and governance arrangements of and between the RTO and LTO's
			Strengthen industry stability and capacity through a sustainable RTO/LTO funding and operating model
			Implement a communication and engagement plan with local government and other industry sectors to maintain and develop support for a strong and sustainable tourism sector
		Align TNQ DTP with the TNQ Regional Economic Plan	Strengthen the resilience of the regional economy by actively supporting and aligning the TNQ DTP with the implementation of the TNQ Regional Economic Plan
			To drive and align priorities and leverage available resources in partnership with the other industry sectors e.g. education, agricultural, marine and retail industries
			Ensure tourism infrastructure priorities align with TNQ Regional Infrastructure Plan & Priorities.

Drivers	Priority Goals	Strategies	Actions
		Preserve and protect the reputation, quality and status of the Great Barrier Reef, Wet Tropics and industry as a leading sustainable tourism destination.	Establishing formal partnerships and collaboration with GBRMPA, WTMA & QPWS to develop and implement the TNQ DTP
			Develop tools that help communicate the health and wellbeing of the regional brand from attempts to undermine the quality of the natural assets
			Government need to adopt accounting practices that adequately values the positive externality benefits, the income that these assets generate and the investment that is required to adequately manage the quality of the assets in TNQ to world class standards
			Enriched visitor experience through the provision of interpretation and natural asset management programs that showcases the iconic experiences - refer to Quality, Service and Innovation section
			Provide more targeted information to support the tourism industry improve the health and protection of the natural assets
			Undertake research to better manage the sustainability of TNQ's natural assets
			Prepare tourism industry for 'anticipatable bolt from the blue' events
			Engage with existing Regional Disaster Management Coordination Group to provide accurate advice to the tourism network to protect the reputation of the region
			Start developing a long-term strategy and build on previous work (DTMR, JCU, RRRRC) to mitigate the region's exposure to peak oil and high fuel prices and climate change adaption
		Align with Destination Success	Start developing a 20 year planning horizon that will consider the longer-term challenges and opportunities that are emerging for the TNQ industry and community, consider various scenarios and develop dynamic strategies to ensure TNQ remains relevant to current and future customer needs.



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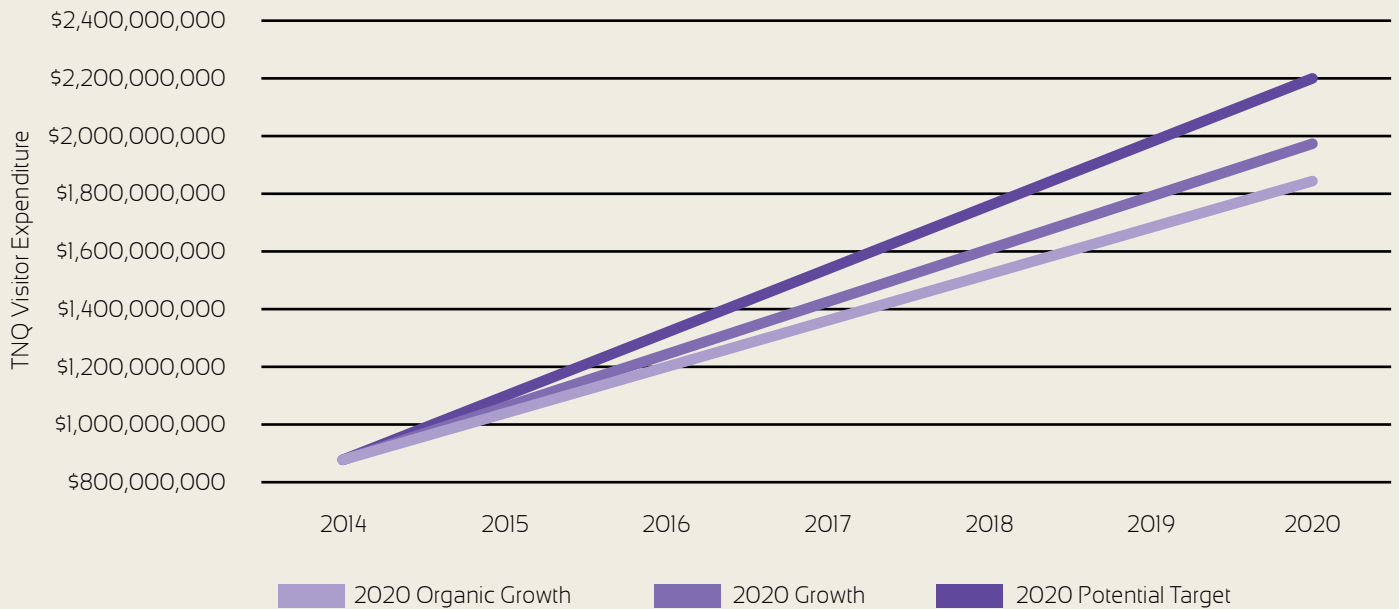


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GROWTH MODEL

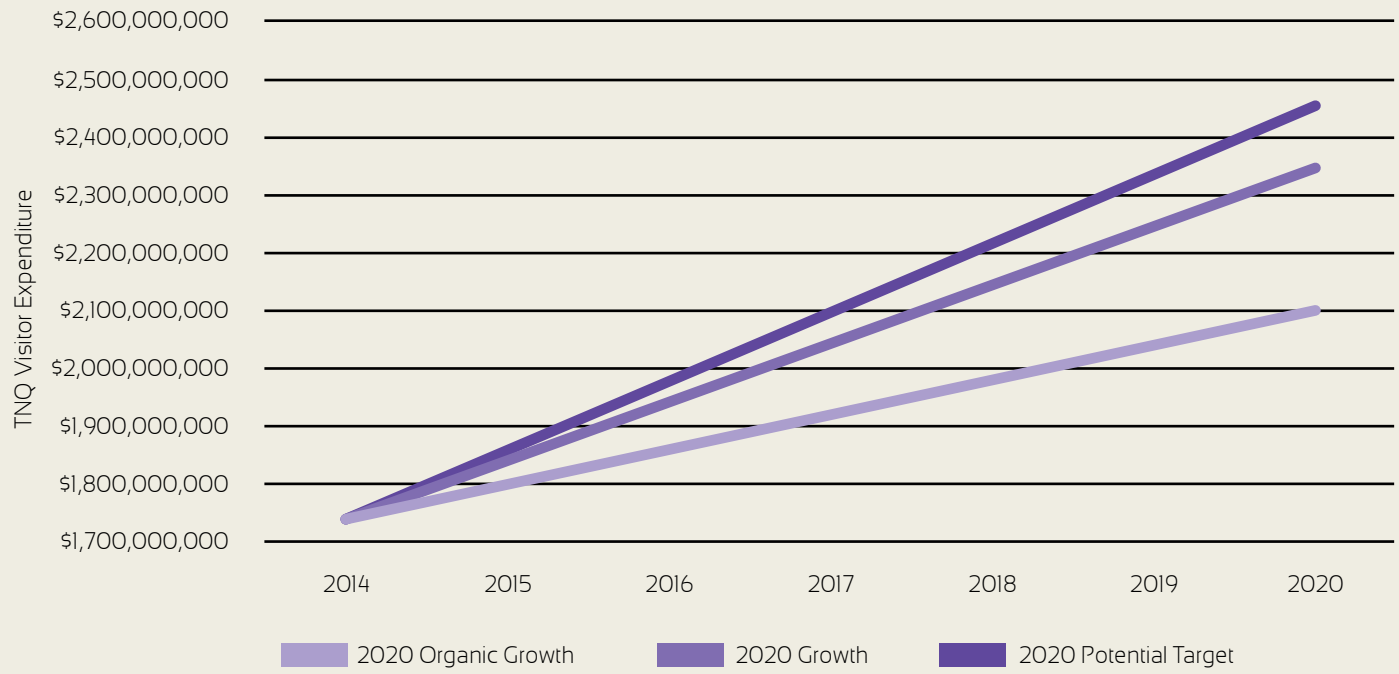
	Existing	2020 Organic Growth	2020 Growth Target	2020 Growth Potential	Growth %
International	\$885,000,000	\$1,837,001,872	\$1,986,096,245	\$2,185,641,045	147%
Domestic	\$1,727,250,000	\$2,101,611,640	\$2,334,763,644	\$2,444,025,982	41%
Potential Visitor Expenditure	\$2,612,250,000	\$3,938,613,512	\$4,320,859,888	\$4,629,667,027	77%
Growth		\$1,326,363,512	\$1,708,609,888	\$2,017,417,027	

TNQ INTERNATIONAL VISITOR EXPENDITURE POTENTIAL





TNQ DOMESTIC VISITOR EXPENDITURE POTENTIAL



OUTLINE REPORTING FRAMEWORK

The following provides an outline framework for the reporting and review of the implementation of the TNQ DTP. The final reporting framework will be dependent on the management framework adopted.

Program Review Progress & Monitoring

Six monthly progress review by the Sponsoring Group with a detailed strategic review of priorities and strategies every 12 months.

Natural Asset Management

Achieving greater strategic alignment between the natural asset managers and users will be achieved through establishing a strategic natural assets review panel comprising TTNQ, WTMA, GBRMPA, QPWS and possibly the Chair Alliance for Sustainable tourism.

It is suggested that this group meets at 2-3 monthly intervals and the agenda driven by DTP strategies.

Touring

LTO group to meet two monthly to review and establish strategies and actions from touring, events, digital leadership, infrastructure and product development, quality service and partnerships.

The Touring Group should consist of Transport & Main Roads, Tourism, State Development, Arts, Police, RDA and AC, Local Government via FNQROC

Events

Further expand existing Tourism Events group with adequate regional representation with the inclusion of FNQROC and CYTSROC. Group to meet monthly or two monthly.

Aviation

The existing Cairns Aviation Strategy Team (CAST) to be re-established and meets two monthly and expanded to include TEQ, TA, AC, DSDIP, CRC and AC.

Infrastructure and Product Development

TNQ RIS group to be expanded to include TTNQ and LTO's. Group to meet two monthly to review and establish strategies and actions.

Group to meet more frequently to review and action particular initiatives and opportunities as they arise.

Digital Leadership

AC & RDA FNQ & TS to expand Dive into Digital Program and expand to include TTNQ, TA and TEQ. Group to meet two monthly to review and establish strategies and actions.



Quality Service and Innovation

Leadership group to be established that is led by TTNQ and involves Cairns Institute (JCU) QTIC, TaFE, regional Chambers of Commerce, Indigenous Coordination Centre, Departments of Employment & Training, RDA FNQ & TS. Group to meet two monthly to review and establish strategies and actions.

Partnerships and Delivery Capability

Leadership group to be established that is led by either TTNQ, AC or RDA FNQ & TS. Group includes LTO's, TEQ, DSDIP, DTMR, QPWS, AC, RDA FNQ & TS, FNQROC and CYTSROC. This leadership group coordinates and integrates with the Natural Asset Management Group. Group to meet two monthly to review and establish strategies and actions.



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