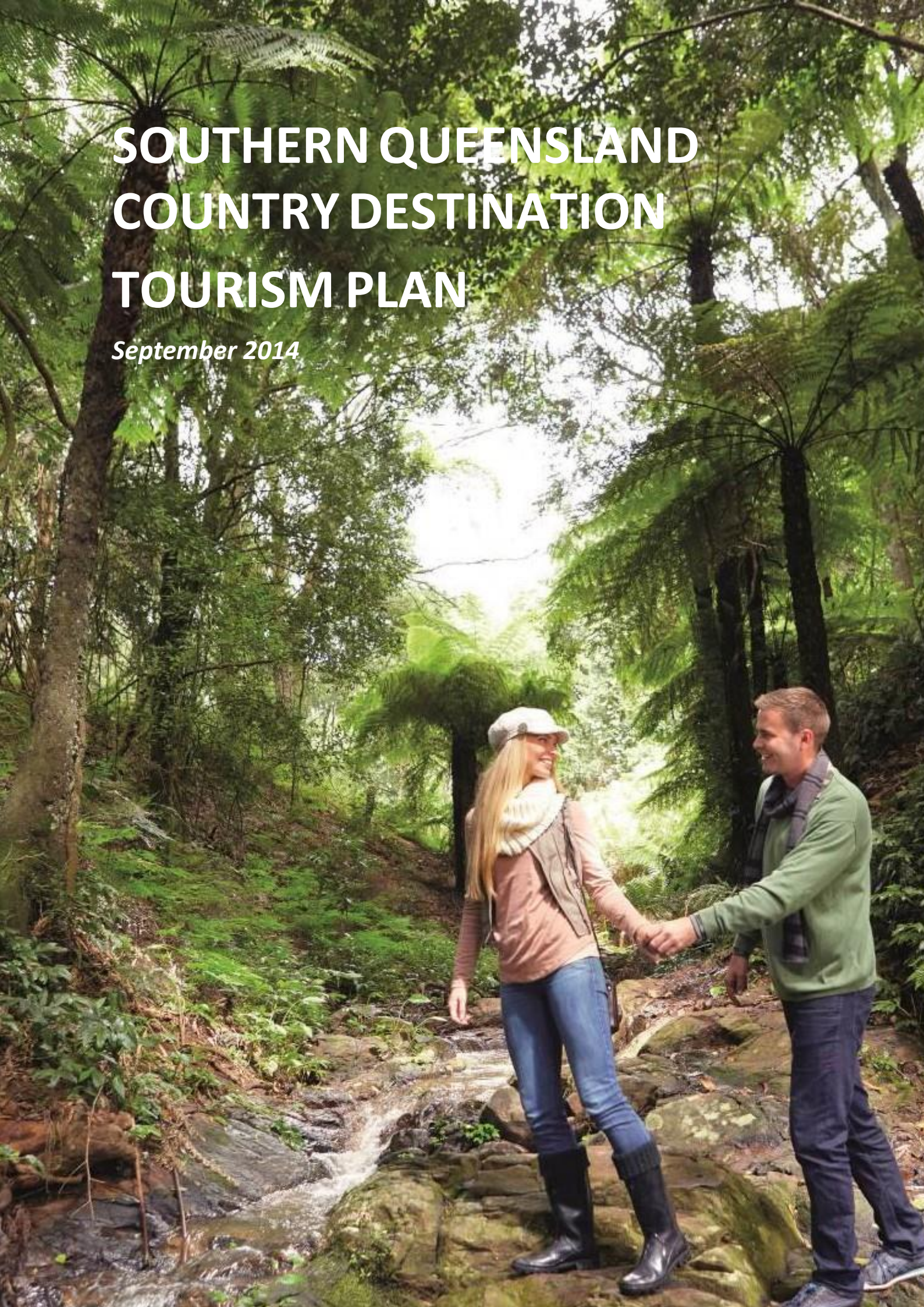


SOUTHERN QUEENSLAND COUNTRY DESTINATION TOURISM PLAN

September 2014



Executive Summary

The Southern Queensland Country Destination Tourism Plan (DTP) is designed to provide clear direction for the development of tourism through to 2020. The process of developing the Plan offered a unique opportunity to consider the implications of megatrends, to appraise the industry's strengths and challenges from a regional perspective, and to determine the most appropriate strategic priorities for creating a sustainable and competitive tourism destination. The collective assessment of the industry and the region's unique assets has created a common understanding and a strong framework for working together.

The Plan has been developed with an emphasis on alignment with state and Commonwealth goals, and with local and regional priorities. The state goal of doubling annual overnight visitor expenditure to \$30 billion by 2020 is the key context for the DTP. In taking on this challenge regionally, Southern Queensland Country (SQC) is seeking to grow overnight tourism from its present value of \$734 million of direct visitor spending in 2013, to a 'stretch' target of just over \$1 billion by 2020.

This past year Southern Queensland Country received approximately 1.83 million domestic overnight visitors, accounting for 5.8 million domestic overnight visitor nights. Overnight domestic visitation has increased by an average of 2% per annum over the past five years and accounts for 91% of all overnight expenditure. Visitors Brisbane and intra-state account for 78.3%, 19% are inter-state and the remaining 2.6% are international.

Looking forward, the key market segments in the domestic market are Connectors and Social Fun Seekers, with Brisbane representing the primary geographic market. The development of the new Brisbane West Wellcamp Airport at Toowoomba opens up the possibility of strengthening inter-state demand, as air routes are established. Internationally, New Zealand remains an important source market, while efforts to leverage Tourism and Events Queensland's focus on Singapore and Indonesia may create opportunity for the region. Realistically, however, growing these markets

will require significant collaborative emphasis on raising the level of quality and the depth of the visitor experience.

By 2020 Southern Queensland Country will be recognised as Queensland's premier country getaway destination known for its distinct seasons and regional flavours; where you can breathe deep and enjoy a taste of life in the country

Southern Queensland Country Tourism
2020 Vision

The region's vision and hero experience themes provided the framework for establishing goals and strategic direction. The goals are:

1. To focus on developing new and strengthening existing hero experiences as a means of attracting new visitors and encouraging increased levels of expenditure.
2. To grow overnight visitor expenditure by 5% year over year.
3. To enhance the positioning of Southern Queensland Country as a destination that can deliver on its core brand promise – *slow down, breathe deep and enjoy a taste of life in the country*.
4. To build a strong and unified industry that works collaboratively to achieve sustainable growth.
5. To continue to use tourism as a means of strengthening the region's commitment to safeguarding and celebrating its cultural and natural heritage assets.

To achieve these goals, action is needed in relation to all areas that have been identified in the state-wide 20-year tourism plan – *Destination Success*. The following strategic priorities were identified and form the basis of this DTP.

Strategic Priorities

Offering iconic experiences

- Develop the culinary experience to strengthen the positioning of Southern Queensland Country as a destination known for its distinct regional flavours.
- Strengthen nature-based tourism activities and develop iconic experiences associated with the region's natural beauty.

Preserve our nature and culture

- Strengthen the visitor experiences associated with the region's history and heritage and raise the profile of Indigenous experiences.
- Create and deliver a balanced portfolio of events that showcase the region's hero experience themes and celebrate unique attributes of local communities.

Deliver quality, great service and innovation

- Commit to continuously improve the quality of the experience we provide to our visitors.

Target a balanced portfolio of markets

- Identify emerging opportunities to target new markets and develop innovative packages that will stimulate new demand.

Build strong partnerships

- Expand the knowledge base of the industry and build its capacity to deliver hero experiences.
- Build a strong understanding of the value of the tourism industry among Regional Councils, the business community and local residents.

Grow investment and access

- Continue to pursue opportunities to improve access to and within the region, and overall connectivity, including digital and mobile connectivity.

Pursuing these strategic priorities collaboratively and developing a partnership approach that involves all levels of government, industry, local tourism organisations and associations and Southern Queensland Country Tourism working together toward a common goal and set of objectives, will place the region in a strong position to develop its tourism industry. Achieving success will require an ongoing commitment to funding and supporting the resource requirements of this pillar of the state economy. Through mentorship, capacity building and a concerted effort to raise the profile of the industry within the region and to market strategically to targeted travellers, the region will see growth in the value of its tourism economy and increased profitability of individual businesses.



Summary of Southern Queensland Country Destination Tourism Plan

GOALS

1. To focus on developing new and strengthening existing **hero experiences** as a means of attracting new visitors and encouraging increased levels of expenditure.
2. To **grow overnight visitor expenditure by 5%** year over year.
3. To **enhance the positioning of Southern Queensland Country** as a destination that can deliver on its core brand promise – *slow down, breathe deep and enjoy a taste of life in the country.*
4. To build a **strong and unified industry** that works collaboratively to achieve sustainable growth.
5. To continue to use tourism as a means of strengthening the region's commitment to **safeguarding and celebrating its cultural and natural heritage assets.**

TARGETS

Grow overnight tourism from its present value of \$734 million of direct visitor spending in 2013, to a 'stretch' target of just over \$1 billion by 2020

ENABLING SUCCESS

1. A commitment to the principle and practice of **partnership and collaboration**
2. A commitment to maintaining existing levels of **funding** and to securing additional funds to ensure that the actions outlined in this DTP can move forward.
3. Recognition of changing market trends and the need to **invest in quality service and the development of engaging and immersive hero experiences.**
4. A strategic approach to developing the **meetings and conventions market.**
5. A **regional perspective** that understands the benefits that can be gained from building Southern Queensland Country as a strong and competitive destination with a high level of market appeal.
6. A commitment to **deepening the maturity of the industry** and to generating a greater level of community support for tourism.
7. A **focus on monitoring, measuring and reporting** on the implementation of this plan, and an emphasis on celebrating success.

STRATEGIC PRIORITIES

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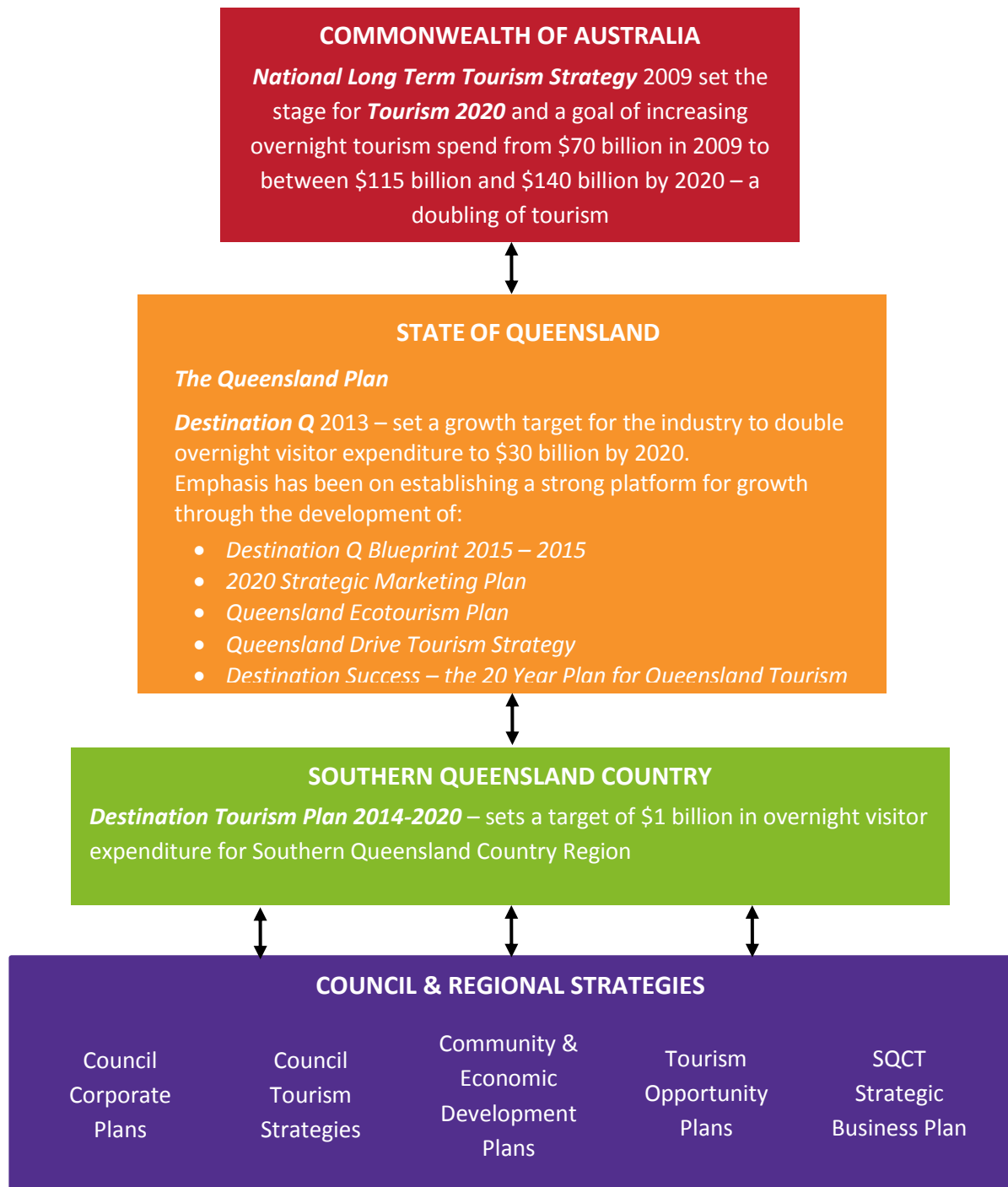
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SETTING THE SCENE

Tourism 2020: A Shared Vision



In December 2009 the Australian Government launched the *National Long-Term Tourism Strategy* and set a minimum goal of doubling the value of tourism by 2020. Having recognised tourism as one of the four pillars of the economy, the Queensland Government has likewise taken on this challenge of growing tourism and is committed to making Queensland the nation's number one tourism destination, with a target of doubling annual overnight visitor expenditure to \$30 billion by 2020. Achieving this goal will require a strong commitment between industry and all levels of government to work in partnership – a vision that is clearly embodied in the DestinationQ Partnership Agreement.

The new 20 Year Queensland Plan, *Destination Success*, and the first Action Plan (January 2014 – June 2015) outline the target and the strategic directions, and provide the context for the Southern Queensland Country Destination Tourism Plan. The Queensland Vision highlights the importance of regional destinations within the tourism system, and their role in showcasing *the best of Queensland*.

This Destination Tourism Plan has been developed with a focus on alignment not only with state and Commonwealth goals, but also with local and regional priorities. In emphasising alignment, the Plan seeks to complement existing strategic directions, reflect underlying community aspirations and provide a framework for ongoing tourism planning and development.

QUEENSLAND VISION

Our diverse iconic experiences will be the foundation of our destinations, and our destinations will be the foundation of our tourism success.

Our destinations will showcase the best of Queensland—our people and lifestyle, our culture and heritage, our natural wonders and climate, and our communities.

The tourism industry will be strong and prosperous, fully engaged with governments and the community, and universally recognised as fundamental to Queensland's economic, environmental and social future.

Destination Success: The 20-Year Plan for Queensland Tourism, December 2013



Southern Queensland Country – The Destination

Southern Queensland Country is strongly characterised by its rural heritage, regional towns and diverse landscapes. Southern Queensland Country is within a 'comfortable' driving radius of Queensland's capital, Brisbane, and stretches from Stanthorpe in the south to Kingaroy in the north, and from Toowoomba in the east to Mitchell and St. George in the west. The destination's natural highlights include Main Range National Park, Queen Mary Falls, and Girraween National Park in the southern section, Crows Nest and Ravensbourne National Parks just out of Toowoomba, Bunya Mountains National Park to the north, and the southern section of Carnarvon National Park in the north-west of the region – together offering diverse ecotourism and nature-based adventure experiences. The diversity of the agricultural landscapes, the growing number of boutique wineries, the artisanal product, and the warm country hospitality are hallmarks of the region that are increasingly appealing to the short-break market and to those visitors looking for an authentic country experience.

In addition to the range of landscapes, the underlying culture and sense of history are key assets of Southern Queensland Country. The pioneering stories that are prevalent throughout the region, the hands-on interactive experiences at museum and heritage attractions, the opportunities to engage in contemporary rural activities, and the unique opportunities to engage with locals in country pubs and boutique accommodation facilities provide a distinctive array of options for visitors looking to 'connect' with the 'personality' of the destination. A large number of events and celebrations animate the region's cultural heritage and attractions – with community festivals and attraction-based events

accentuating distinctive attributes of country life in Southern Queensland Country. Likewise, the growth in unique sporting events and the region's success in attracting major state, national and international sporting tournaments all demonstrate the significance of sport as a key motivator for travel to the region.

The ability of the destination to build on these assets is strengthened by its proximity to the Brisbane market and its location in relation to major touring routes, including the Adventure Way, the Great Inland Way, Australia's Country Way, and the Leichhardt Highway. Other drives, such as the Rural Getaway, provide further opportunities to traverse the region. With the development of the Brisbane West Wellcamp Airport in Toowoomba, the region has the exciting new potential to diversify its market base and strengthen existing inter-state markets from Sydney and Melbourne.

Creating awareness of the destination in the marketplace is critical to this ongoing growth of visitation and is led by Southern Queensland Country Tourism (SQCT) as the peak regional tourism organisation. The promotional efforts of local tourism organisations and Regional Councils, and the marketing activities of the Highway Committees complement the work of SQCT, and the combined marketing activities have succeeded in strengthening the profile of the region in its key markets. Identifying opportunities to build on this awareness and to move customers along the 'path to purchase' are vital in assisting the region reach its 2020 targets.

The Southern Queensland Country Visitor Economy: Towards 2020

Tourism currently generates \$734 million of direct visitor spending¹, with overnight visitors to Southern Queensland Country contributing a total of \$1.25 billion of direct and indirect expenditure to the local economy. This in turn **supports 21,907 full-time equivalent jobs**.

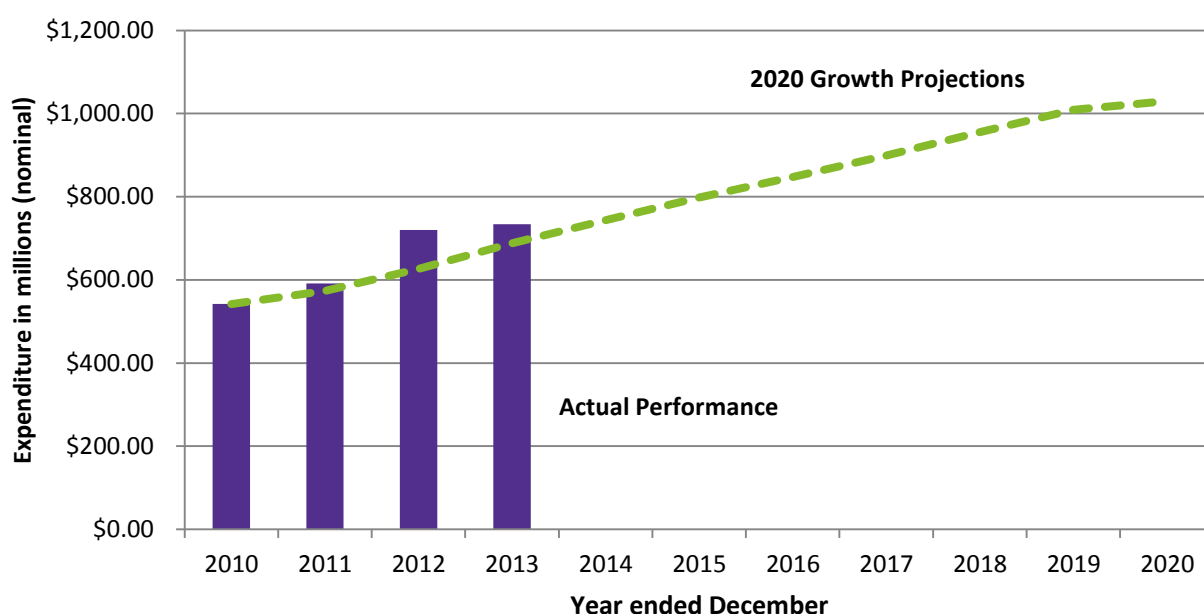
Taking on the Government's challenge of doubling tourism by 2020 creates **a target of \$1 billion in overnight visitor expenditure** for Southern Queensland Country region. Achieving this target will not only benefit the regional economy and the profitability of individual business operators, but it will also have a wider potential impact on local communities through:

- Stimulating economic diversification and growth in other sectors of the economy – research indicates that every dollar spent in tourism generates a further 91 cents in other sectors².

- Providing a rationale for the protection of landscapes and greater appreciation and promotion of local cultural heritage.
- Enhancing the destination image and general liveability of communities.
- Offering a greater level of consistent return-on-investment vis-à-vis other key economic sectors.

Looking ahead at the 2020 target, Southern Queensland Country is in a strong position with the tourism industry recently demonstrating performance that is slightly ahead of projections. However the target remains a challenge and one that will require a strong and sustained commitment from industry and all levels of government to work together in the pursuit of a shared vision and common goals.

Figure 1: Southern Queensland Country Annual Overnight Visitor Expenditure – Actual Performance and 2020 Growth Targets



¹ SQCT, January 2014, *Southern Queensland Country Destination Tourism Plan – Discussion Paper* – see Appendix 2

² Australian Government, Dept. of Resources, Energy & Tourism / Tourism Australia, December 2011, *Tourism 2020*

The Megatrends

Any discussion on developing tourism must consider the global trends that are affecting the industry and likely to have an impact on operators. The work undertaken by the Commonwealth Scientific and Industrial Research Organisation (CSIRO) and the Queensland Government as background to developing state-wide and regional growth strategies, identified seven megatrends that are likely to shape the Queensland tourism sector through to 2033³. The implications of these trends for SQC are noted in the Discussion Paper in Appendix 2.

1. **The Orient Express** – The world economy will significantly change over coming decades. Rapid income growth within emerging economies will create new markets and new sources of competition. Major growth opportunities are associated with attracting new tourists from the developing Asia region and ensuring Queensland is a differentiated and aspirational destination for domestic and international travellers.

Implications for SQC – Overseas visitors as a whole currently make up a small proportion of Southern Queensland Country's overall visitor market. Although Asian visitors account for 23% of the total overseas market at present, it is unrealistic to expect Asian markets to be the key drivers of leisure tourism growth in the Region. However it is important that the Region is positioned to capture its share of custom where opportunities are available.

2. **A Natural Advantage** – Global biodiversity and natural habitats are disappearing at alarming rates. Those areas of remaining pristine natural habitats are of increasing value. As the world's population grows and becomes increasingly urbanised, tourists will be drawn to nature-based experiences. Queensland's natural assets will become an increasingly important draw-card for locals and visitors alike.

Implications for SQC – The region has exceptionally strong assets in terms of its national parks and World Heritage Listed areas, and has the potential to stand out from the crowd.

3. **Great Expectations** – As incomes grow, people shift their discretionary expenditure towards experiences as opposed to products. The experiences future tourists will seek will be 'authentic' to the destination and its people, personalised and often involve social interaction and emotional connection.

Implications for SQC – Building on the hero experience development program, Southern Queensland Country businesses need to respond to the challenge and deliver quality service and experiences.

4. **Bolts from the Blue** – Sudden and hard to predict events such as extreme weather and infectious disease outbreaks have greater likelihood in a world with a changed climate, antimicrobial drug resistance and increased human mobility. When combined with the growing importance of safety perceptions, these events will have both positive and negative impacts on Queensland tourism expenditure depending on where they occur in the world and the perceptions potential travellers have regarding their impacts.

Implications for SQC – Businesses and tourism managers need to monitor opportunities and risks, and be ready to respond appropriately and in a timely manner.

5. **Digital Whispers** – In the digital age, models of human communication and decision making are changing over time. Information flows much more rapidly and via widely distributed channels. The perceived credibility of information sources is also changing. The online world has created new risks and opportunities for the tourism sector.

Implications for SQC – Fundamental challenges for businesses relate to the level of access to digital infrastructure and services that would provide the opportunity to fully adopt and successfully apply new technologies; and, where it exists, a commitment to utilising it to full effect.

6. **On the Move** – People are becoming increasingly mobile. While leisure remains a strong motivator for travel, people are travelling further and more frequently for many reasons such as trade, business, events, conferences, education and healthcare. Technological advances in the transport sector, particularly aviation, will enable the continued rise in mobility as people are able to move greater distances, faster.

Implications for SQC – Maintaining air and road capacity, and effective public transport access are key to maximising the potential of this trend.

The Lucky Country – Queensland and Australia have travelled through the financial turbulence of the last decade exceptionally well compared to many other wealthy countries. Australia and Queensland are expensive destinations. Local tourism operators face higher costs than many overseas competitors.

Implications for SQC – The need to compete on quality, experience and service will have implications for investment decisions by businesses and destination management partners.



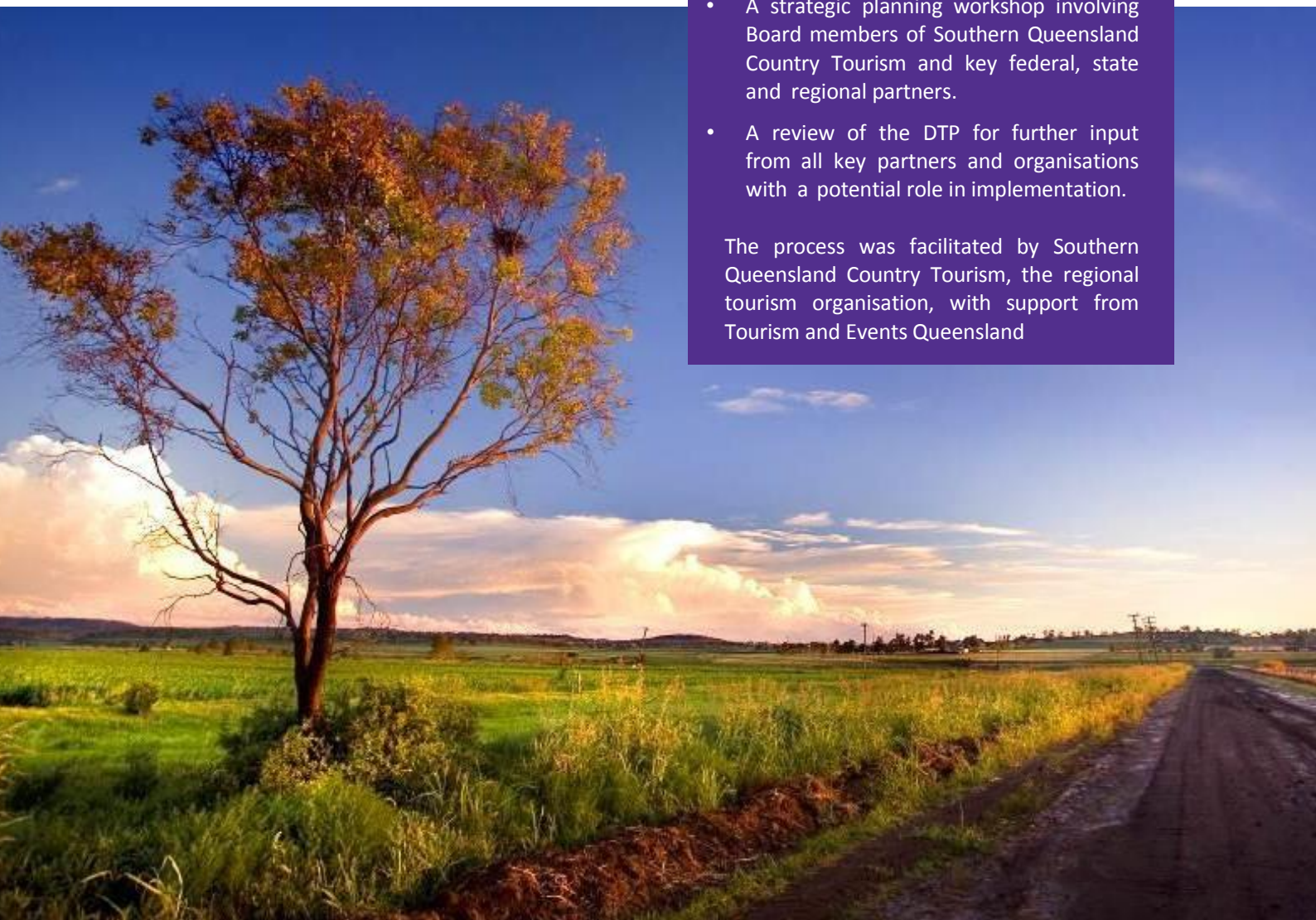
The Destination Tourism Plan – Our 2020 ‘Roadmap’

This Destination Tourism Plan (DTP) is designed to provide clear direction for the development of tourism through to 2020. The process of developing the Plan provided a unique opportunity to look at the industry’s strengths and challenges from a regional perspective, and to determine the most appropriate strategic priorities for creating a sustainable and competitive tourism destination. The collective assessment of the industry and the region’s unique assets has created a common understanding and a strong framework for working together. This framework in turn provides a context for ongoing local and regional planning, and it will be important to regard the DTP as a ‘living document’ that is designed to encourage sustained collaboration and alignment of tourism priorities throughout the region.

THE PLANNING PROCESS

- Review of the planning policy context – national, state, regional and local – and the development of a *Background Discussion Paper* on the current status of the tourism industry in Southern Queensland Country.
- Four consultation workshops throughout the region offering industry stakeholders the opportunity to discuss the 2020 target for growth, involving 80 participants.
- A local government forum involving 24 elected and staff members of the Regional Councils within Southern Queensland Country, with a focus on identifying regional priorities.
- A strategic planning workshop involving Board members of Southern Queensland Country Tourism and key federal, state and regional partners.
- A review of the DTP for further input from all key partners and organisations with a potential role in implementation.

The process was facilitated by Southern Queensland Country Tourism, the regional tourism organisation, with support from Tourism and Events Queensland

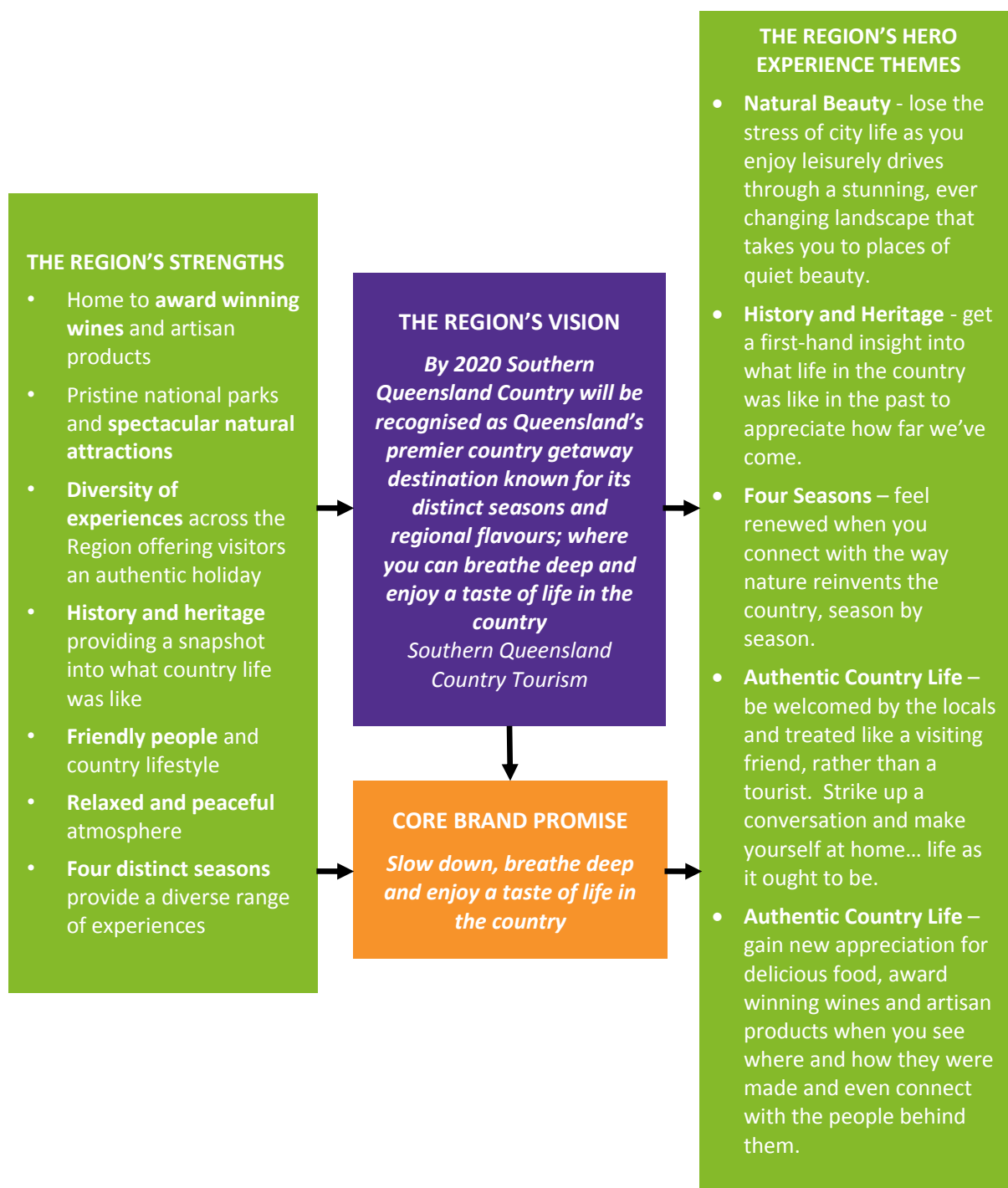




OUR REGION – A COLLECTIVE REVIEW

Building On Our Strengths

The region's strengths are inherent throughout the destination – in Toowoomba and the Darling Downs, the Southern Downs and Granite Belt, the South Burnett and the Western Country. The **Southern Queensland Country Tourism 2020 vision** for the region and the **core brand promise** clearly build on the region's strengths, and are in turn encapsulated in the **hero experience themes**. These themes have become the basis for identifying relevant growth strategies for Southern Queensland Country, and provided a common platform for all planning discussions.



Hero Experiences

The concept of 'hero experiences' and the themes that have been developed for Southern Queensland Country have become tools that can be used by destinations and operators alike in the assessment of their tourism product and marketing. The initiative is a direct response to changes in market expectations and the growth in demand for authentic, engaging experiences³. It encourages the industry to be more proactive and creative in building on regional strengths and assets, and has already stimulated change in marketing and in the development of new visitor experiences. Change of this nature reinforces the core brand promise and moves the region closer toward realising its 2020 vision.

Hero experiences are those world class iconic experiences that:

- Provide a destination with a real competitive advantage over other destinations,
- Focus on what is truly unique or memorable or engaging about a destination, and
- Meet the needs of identified target markets.

Focussing on a destination's 'hero experiences' is:

- Responding to the demands of our domestic and international visitors,
- Designed to gain a competitive advantage over other destinations, and
- An opportunity to focus the efforts of tourism stakeholders and create partnerships.

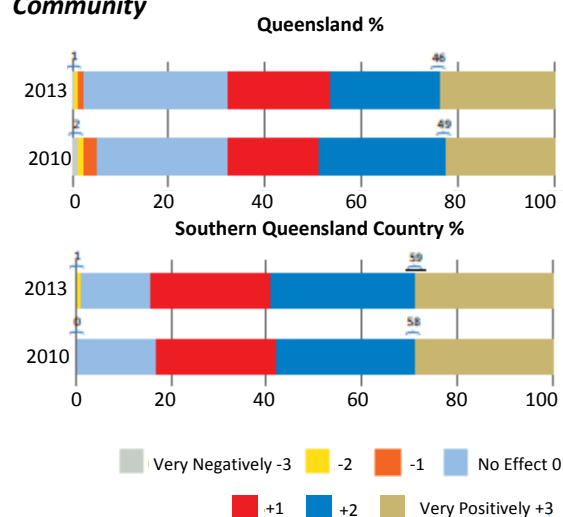
³ A tourism 'experience' is the emotional feeling or visitor derives from the purchase, participation or consumption of a tourism product – accommodation, attractions or tours. The 'tourism product' is what the customer buys; the 'tourism experience' is what they remember. (Southern Queensland Country 'Hero Experiences' Fact Sheet

Community Support for Tourism

Developing a strong tourism industry requires a supportive community. In this regard, research indicates that Southern Queensland Country enjoys a level of support for tourism that is above the average for Queensland as a whole⁴.

When asked to rate the overall impact tourism has on their community, using a seven point scale ranging from very negatively (-3) to very positively (+3), 59% of SQC respondents indicated a score of +2 or +3, while only 49% responded with this level of support for the state overall. Only 1% of respondents thought tourism impacted negatively (rated the impact -2 or -3) on the community – the same as other Queenslanders.

Figure 2: Perceived Impacts of Tourism on the Community



Similarly, residents from SQC are more likely to support tourism development growth (70% compared with 59% for Queensland), and show a higher level of support for attracting more visitors to the region. Key to this level of community support is a greater degree of appreciation for the overall benefits of tourism to the region, with SQC residents consistently rating the impact of tourism more positively than the average ratings for Queensland.

While this research indicates a solid base of community support, the planning discussions highlighted that more effort is required in

⁴ Tourism and Events Queensland, November 2013, Southern Queensland Country Social Indicators 2013

promoting an awareness of the significance of tourism to the regional economy. Improving the level of understanding among local businesses and within Regional Councils is identified as an area where further action is required if the region is to succeed in reaching its 2020 targets. While political support for tourism is evident within many communities, challenges remain in ensuring that local governments fully understand the significance of tourism as one of Queensland's four pillars of the economy, and their potential role in stimulating growth.

Consumer Perceptions

Market awareness of a destination is a prerequisite of growth. Competing alongside regions such as the Gold Coast and the Sunshine Coast that enjoy strong regional, national and international recognition requires a strategic approach to branding and the development of clear positioning in the marketplace. The recent restructuring of SQCT as the peak regional tourism organisation, the consolidation of the brand under the core brand promise: ***Slow down, breathe deep and enjoy a taste of life in the country***, and the work on developing the hero experience themes are beginning to deliver promising results. The recent inaugural brand health check on the SQC brand⁵ following the launch of the brand in 2013 indicated a score of 0.7 – a higher score than Toowoomba & Darling Downs, Southern Downs & Granite Belt, Western Downs and South Burnett ever received individually⁶. This suggests that the destination brand is beginning to gain traction and has more meaning to consumers than the

⁵ TEQ, 2013, *Southern Queensland Country Brand Health Check 2013* (DRAFT presentation)

⁶ The **Brand Equity Index** is a measure of the perceptions consumers hold in their head about a brand or destination. It calculates a score out of 10 for a destination based on how well consumers know the destination, what consumers know about the destination, how consumers feel and their loyalty to the destination. The higher the score, the more a brand means to consumers and the more likely they are to consider, visit or recommend the destination. Fifty percent of BEI scores are under 1.0; 13% are between 1.0 and 3.0 and 15% are over 3.0.

By way of comparison, in 2012 the BEI for Toowoomba & Darling Downs was 0.6, Southern Downs & Granite Belt scored 0.5, South Burnett was 0.3 and Western Downs was 0.3.

community focused brands, despite ongoing local efforts to promote sub-regions.

The challenge for SQC now is to leverage this traction through coordinated and collaborative marketing activities with SQCT that will further enhance market awareness and will increase the likelihood of consumers considering the region for a holiday. Lower consideration scores likely reflect a more limited understanding of what is on offer in the region.

The task of leveraging the brand equity is promising given the initial associations consumers have with the region. The Brand Equity Index research has indicated that Southern Queensland Country is best known for being a place where consumers can feel relaxed, reflect and recharge at their own pace, leave the cares of the world behind, and have the freedom to be who they want to be and feel like one of the locals. The core brand promise and the 2020 vision for the region is clearly resonating with consumers and, provided that there is a focused and collaborative approach to promoting this message, the region should begin to enjoy the benefits of a stronger market position.

Table 1: Southern Queensland Country – Market Awareness

2013	Residents		
	All Qld	Brisbane	Regional Qld
Aware of the destination	73%	71%	74%
Would consider visiting	55%	56%	53%
Have visited			
a) Have been there before	34%	38%	31%
b) Visited in the last 12 months	8%	10%	7%

A Restructured Organisational Framework

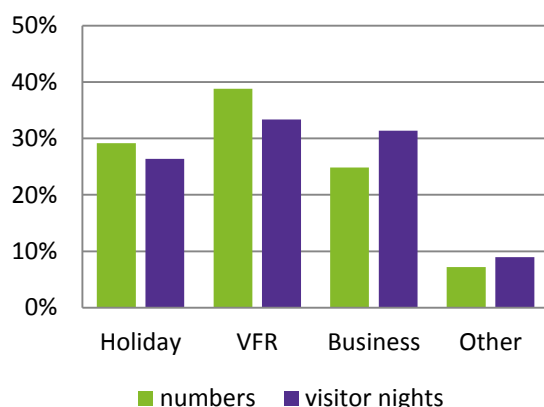
In assessing the competitive strengths of Southern Queensland Country, the planning discussions highlighted the progress that has been made in strengthening the industry as a result of the regional restructuring process and the establishment of SCQT as the regional tourism organisation (RTO) and the peak tourism body. While it is still early days for the RTO, there is evidence that its activities are generating a growing level of collaboration and that the industry is benefitting from the regional branding process, the enhanced networking opportunities and communications, and the stronger governance model. Building on these internal dynamics and working toward a vibrant partnership approach where roles and responsibilities complement rather than duplicate, will create the foundation that is needed to generate sustainable growth of the industry and move toward the 2020 targets.



Our Markets

This past year (YE June 2013)⁸, Southern Queensland Country received approximately 1.83 million domestic overnight visitors, accounting for 5.8 million domestic overnight visitor nights and \$669 million in expenditure. Overnight domestic visitation has increased by an average of 2% per annum over the past five years. Visiting friends and relatives (VFR) is a particularly important segment for Southern Queensland, accounting for 39% of all overnight visitors (largest proportion of visitors by purpose of visit). However, it is interesting to note that while business visitors only account for 25% of visitor numbers, their level of current spend is greater and this market segment overall generates almost 31.4% of domestic overnight expenditure. It should also be noted that there needs to be a degree of caution in assuming that this trend can be maintained. An element of this business market is associated with the resource sector, and the volatility of that sector can have significant impact on related occupancy rates.

Figure 3: Domestic Overnight Visitation (YE June 2013)



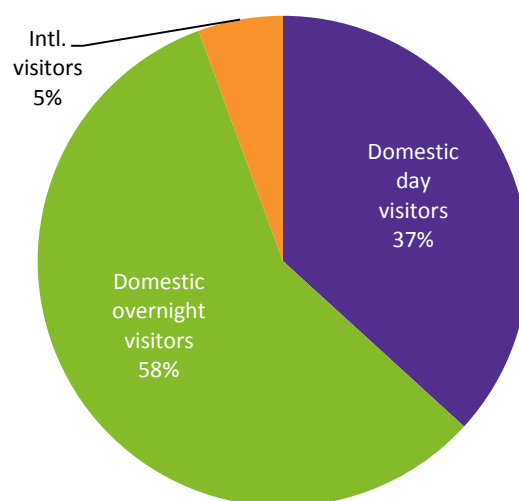
Domestic day trip visitors totalled 4.02million for the region and generated \$427 million.

While the value of this segment does not contribute to the overall 2020 goal, it remains a very important element of tourism within the region.

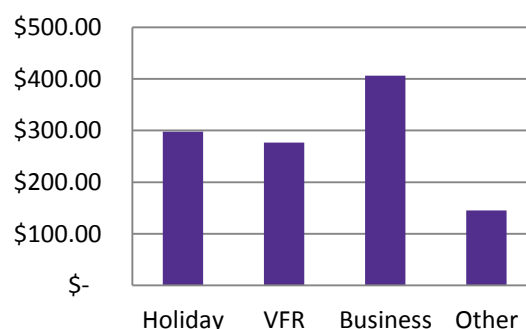
In terms of international visitors, Southern Queensland Country attracted 48,000 out-of-country visitors this past year (YE June 2013), accounting for 1.5 million international visitor nights and \$65 million. While the level of visitation has remained largely static since 2008, the number of visitor nights has increased by 12%. On the basis of anecdotal evidence, it is likely that this length of stay is skewed by younger international visitors who come for seasonal farm work.

Focusing on overnight visitors alone, domestic overnight visitors account for 91.1% of all expenditure, while international visitors account for the remaining 8.9%.

Figure 4: Visitor Expenditure (YE June 2013)



Daily Spend by Visitor Type 2013



Local Visitation Rates

The following table presents the visitor data by local area. Tourism and Events Queensland has analysed the data for the local areas shown below using average annual data from years ending December 2009 to December 2012⁷ and presented this in a series of community profiles⁸.

This data illustrates:

- The significance of tourism as a key sector of local economies.
- The importance of the 'visiting friends and relatives' segment and the corresponding key role that residents play in hosting visitors and introducing them to the sites and attractions within the region.

- The variations in key market segments by community, and the importance of identifying local tactics that will strengthen the economic return from each of these markets.

Achieving success in moving toward the 2020 targets will significantly increase the value of the tourism sector within each local area and highlights the importance of working in partnership to support the development of the industry and to implement this Destination Tourism Plan.

Table 2: Visitation Rates and Expenditure by Local Area

	South Burnett / Cherbourg	Toowoomba	Southern Downs	Goondiwindi	Balonne	Maranoa	Western Downs
Domestic Overnight	195,000	822,000	286,000	114,000	62,000	178,000	143,000
% holiday	36%	27%	52%	34%	32%	35%	27%
% VFR	43%	45%	34%	30%	12%	21%	31%
% business	14%	19%	11%	23%	12%	36%	36%
% Brisbane	29%	33%	47%	24%	13%	17%	33%
% rest of QLD	59%	48%	35%	36%	60%	66%	56%
% interstate	13%	19%	18%	40%	28%	16%	12%
Total Spend	\$68m	\$265m	\$84m	\$33m	\$25m	\$61m	\$55m
Per visitor spend	\$349	\$323	\$294	\$286	\$398	\$343	\$387
International	3,000	25,000	9,000	3,000	2,000	7,000	4,000
Approx. intern. spend	\$4m	\$34m	\$12m	\$4m	\$3m	\$9m	\$5m
Domestic day trip	313,000	2,155,000	511,000	82,000	n/a	128,000	165,000
Day trip spend	\$37m	\$256m	\$61m	\$10m	n/a	\$15m	\$20m
Approx. total visitor spend	\$109m	\$555m	\$157m	\$47m	\$28m	\$85m	\$80m

⁷ National Visitor Survey (NVS) and International Visitor Survey (IVS) data is collected at the Statistical Area Level 2 (SA2) rather than Local Government Area (LGA). SA2's are based on population and sometimes multiple SA2's are aggregated in the dataset.

⁸ The data on international expenditure is an approximation based on a calculation of total international expenditure for SQC over total international visitors times the number of international visitors to the local area.

Overview of the Region's Strengths and Areas of Concern

The following table presents a summary of the region's strengths and opportunities, and its weaknesses and underlying areas of concern. The themes all represent areas where action is needed in developing a more competitive destination.

Strengths & Opportunities	Weaknesses & Areas of Concern
<ul style="list-style-type: none"> • Significant potential to build on the assets associated with the hero experience themes – growing market demand for experiential products and learning experiences • Range of events – opportunity to use events to promote the hero experiences • A foundation in place for building culinary tourism through the work of the Regional Food Network; increasing recognition for regional wines; potential to create niche-interest in 'bush tucker' in the Western Country • Brisbane West Wellcamp Airport and the future development of the bypass – potential to build air travel and attract new markets • Growing interest in niche sectors that fit with SQC – adventure nature-based tourism (e.g. mountain biking), agri-tourism, culinary tourism, night sky tourism • National Parks – considerable untapped potential – need to leverage the Queensland Ecotourism Strategy • Proximity to the Brisbane market • High level of interest in developing new historic rail product • Current global 'slow' movement trend offers the region potential to build on the brand promise – e.g. food that is produced or prepared in accordance with local culinary traditions; travelling slowly and immersion in the locale • Drive tours/highway routes – the potential to develop engaging experiences for various lengths of stop-overs • Potential for value add products for sporting and business event tourism • Potential to make better use of available business tools (free and other) to add depth to understanding of operator business acumen – e.g. QTIC Business Barometer 	<ul style="list-style-type: none"> • Roads / repair issues / safety / signage • Poor digital connectivity • No major 'wow' attraction • Limited attractions for the international market • Industry lacks maturity • Industry linkages between and within the sub-regions is weak • Events work in isolation – lack of communication between event organisers • Range of commitment from local governments • Linkages between trail systems • Insufficient local awareness of attractions and the importance of tourism to the local economy • Insufficient packaging – need for increased understanding on building experiences • Regional initiatives such as 'Hand-Made in Country' not always embraced by the entire region; the work of the Regional Food Network has received inadequate support and the initiative is constrained in its potential to build linkages • Inadequate level of industry intelligence on performance of the industry – particularly accommodation businesses with under 15 units and overnight camp stays • Need to lift product standards – level of service often below international market standards. Need to improve operator understanding of global trends • Limited uptake on industry development programmes • Insufficient levels of quality 4/5 star accommodation – creates issues in developing new markets • Untapped Indigenous potential – e.g. add-on culinary experiences; guided services



THE STRATEGY FRAMEWORK

Implications of the 2020 Challenge

The shared state-wide target of doubling overnight expenditure by 2020 requires a critical assessment of current markets and an understanding of the level of growth that is anticipated in each of these markets. The table below⁹ identifies the current geographic market mix for Southern Queensland Country, the current level of expenditure and the stretch targets in terms of visitor numbers and expenditure for 2020 based on the Deloitte Access Economics forecasts for the region. The implications of the forecasts equates to a 5% growth rate overall per annum.

While this target in itself is challenging and a clear stretch for the region¹⁰, the forecasts for the growth in international expenditure are regarded as unrealistic given the current product offering, composition of the markets, and marketing focus. Nevertheless, the 5% annual growth rate sets a target and is a valuable benchmarking objective¹¹. What is more important than the actual targets for the various markets, (particularly the international segments which could have the capacity to demotivate industry), is a commitment to maximise growth and pursue opportunities that are particularly relevant to the region. This DTP focuses on these opportunities.

Table 3: Southern Queensland Country – 2020 Target Market Share Estimates (Summary)

Market Segment	Number of overnight visitors 2013	Current share of total visitors	2013 Expenditure	Share of 2013 Expenditure	2020 Additional Target Numbers	2020 Target Expenditure	Share of 2020 Expenditure
Domestic Intrastate	1,471,000	78.3%			+ 288,000	\$546 m	53%
Domestic Interstate	359,000	19.1%			+ 70,000	\$247m	24%
Total Domestic	1,830,000	97.4%	\$669.3 m	91.1%	+ 358,000	\$800 m	78%
International	48,000	2.6%	\$65 m	8.9%	+ 18,000	\$230 m	22%
TOTAL	1,878,000	100%	\$734.3 m	100%	+376,000	\$1 billion	100%



Growing the value of overnight tourism in Southern Queensland Country – reaching the 2020 target

⁹ The projected figures are calculated using the Deloitte Access Economics forecasts for Queensland and the Southern Queensland Country region and are based on the assumption that the SEQ Markets will grow proportionately to State market forecasts based on the region's current market share.

¹⁰ However, it should be noted that independent research for the new Brisbane West Wellcamp Airport has forecasted 1.36 million passengers per annum by 2019. This data reflects both existing and projected growth in inbound and outbound traffic, and not only suggests that the Deloitte data may be conservative, but also highlights the potential opportunity to grow the inter-state markets.

¹¹ The 2020 Growth Scenarios are presented in Appendix 2.

The Target Markets

Domestic Markets

To generate both the growth in actual visitation and the growth in expenditure, there is a need for a greater understanding of the dynamics of the markets and the changes in market expectations. Looking at the domestic market, Tourism and Events Queensland's research has defined six market segments based on visitor needs and wants, and has identified two that are of particular relevance to Southern Queensland Country, with Connectors being the primary segment. The profiles that have been developed for the two segments give valuable insight into consumers' expectations and behaviour and need to be carefully analysed to ensure that there is a fit between both the experience being offered and the marketing message with the targeted segment.

Connectors - *They see holidays as a chance to connect with the people they care most about. They will often compromise their own preferences in terms of activities to ensure everyone has a good time. It's about what is real and what's important.*

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

While Connectors and Social Fun Seekers are the two key segments for Southern Queensland Country as a regional destination, tourism businesses may well have product that will have strong appeal to other segments. Operators should review their visitor experiences in relation to all the segments¹² and assess the potential market interest and the opportunities to cross-market with other appropriate businesses (see Appendix 1)¹³.

¹² Tourism Queensland, 2011, *Understanding our Consumers: TQ's Domestic Market Segmentation*

¹³ Looking ahead to 2020 and opportunities to maximise the development of hero experiences, there is a need for TEQ to consider reviewing the current segmentation model. The existing model has value in encouraging operators to look at their visitor experiences and marketing messages from the perspective of visitor types and their motivations and travel values. However, the model is 'static' and does not offer the capacity to accurately identify and measure the segments in the market place, nor does it provide an understanding of the media habits of these segments which is necessary for targeted marketing. Ideally, a segmentation tool of this nature needs to be able to confirm current markets within a destination, understand and identify the changing dynamics of market segments over time, and provide market intelligence that enables targeting of the 'best' customer on an ongoing basis. This approach is best exemplified in Canada with the Canadian Tourism Commission's Explorer Quotient™ tool.



	Connectors	Social Fun-Seekers
I am...	Friendly, supportive, loyal, appreciative, kind, caring, sociable, reliable, trustworthy, responsible and level-headed. I also want my holiday to say I'm adaptable and dependable.	Positive, sociable, carefree, fun-loving, spontaneous, lively, outgoing, friendly, active, energetic, adventurous, self-assured and casual.
I seek...	To leave the cares of the world behind. I also seek to reconnect with family or friends, to ensure others enjoy themselves, to bond with others and to connect with everyday things.	To feel fun loving, carefree and lively.
I feel ...	Relaxed, happy, joyful and comfortable. I also want to feel sharing, warm (a part of things) nurturing, caring and I want to unwind and let go.	Sociable, happy, joyful, free, easy and relaxed. I also want to feel excited, exhilarated, vital and alive – like I have escaped.
I can ...	Go on a daytrip, rest and relax, go to the markets, visit a natural attraction, explore the countryside, go whale/dolphin watching, shop for pleasure, go to night markets and cafes, sightsee, experience casual dining, visit waterfalls, gorges or secluded water holes. I can also explore the countryside, watch wildlife in its natural habitat, relax by spending time in a local café/plaza and shop for Australian items or local brands.	Go to the beach, visit a theme park, meet and mix with other people, go to pubs or night spots, visit tropical islands, experience casual dining, take part in adventure activities, shop for pleasure, go to the markets, explore the coast and take part in water activities. I can also mingle with locals, go swimming and go to casinos.
Where I stay	I prefer to stay in a standard hotel room, self-contained house, apartment or holiday unit. Ideally, my accommodation offers cooking facilities and is child-friendly. Add-ons such as the latest technological conveniences and day spas are not so important. While a commitment to environmental protection is valued, at the end of the day, where I stay simply needs to be clean and comfortable.	Ideally, I would stay in a luxury resort or hotel offering a pool and spa, big balconies, and a day spa and health treatments. However, I consciously save on accommodation in order to have more money to spend on activities and therefore can be equally satisfied by accommodation that is more moderate, but clean and comfortable.
How I get around	I am more likely than other segments to drive to the holiday destination and consider the journey to be part of the experience. However, I am not averse to flying.	For me, the journey getting to the destination is a big part of the holiday experience and I will often drive. However, once I am there I prefer to not drive much.
How I dine	Dining experiences are generally about getting together with family and/or friends to enjoy good food. Where I dine isn't of great concern, it is a chance to have someone else cook.	Having someone else cook is part of my holiday experience. Dining experiences are generally casual, relaxed occasions where time is taken to enjoy other's company as well as a nice meal. It is also the chance to try new or local cuisine.
Who I travel with	I may travel just with my partner, but I am most likely to travel with my family, and more likely than other segments to do so. During my holiday I am happy to mix with others in passing.	Friends and family are very important to me and I love people dropping in out of the blue. I am more likely than other segments to travel with a bunch of friends. However I will also travel with my partner or family. On holidays, I like to meet and mix with new people as well as those I'm travelling with.
My holiday patterns	I tend to build holidays around family and friends. I don't get away for weekend breaks often, but in spite of this, my partner and I like to get away for a short break at least once a year without the kids.	I am open to package holidays, as it allows someone else to do all the organising while I focus on having fun. I like to splash out on a short indulgent break every year and travel overseas every few years. Regardless, I like to find a new holiday destination every year.

International Markets

Tourism Australia has undertaken extensive research to identify the ideal international visitor segment for Australia which will help the country achieve its growth targets. As with the Queensland research, Tourism Australia has determined that the key defining characteristics which group people into segments are psychographic and include factors such as personal motivations and lifestyle values. These characteristics correlate with travel and experience preferences. On the basis of this research, the international segment with the greatest likelihood to seek opportunities to travel to Australia is referred to as the “Experience Seeker”¹⁴.

These people:

- Are experienced international travellers.
- Seek out and enjoy authentic personal experiences they can talk about.
- Involve themselves in holiday activities, are sociable and enjoy engaging with the locals.
- Are active in their pursuits and come away having learnt something.
- Are somewhat adventurous and enjoy a variety of experiences on any single trip.
- Place high importance on value and hence critically balance benefits with costs.
- Place high value on contrasting experiences (i.e. different from their day-to-day lives).

Looking at the current international markets visiting Southern Queensland Country, of the 48,000 visitors, 23% are from New Zealand, 23% are from Asia, 13% are from the UK and 8% are from the USA. While a proportion of these visitors may be Experience Seekers as defined by Tourism Australia, it is likely that many are not, but are visiting the region on temporary youth working visas or are travelling on business (e.g. agricultural research). Moving forward and recognising the challenge of the 2020 targets, a greater concerted effort will be required if the region is to successfully attract Experience Seekers and higher-value visitors. In the foreseeable future, these visitors are most likely to originate from New Zealand and from some of the markets that TEQ is actively pursuing in Asia – namely Singapore and Indonesia given the independent nature of travelers from these markets. At a minimum growing these markets will require the need to work together in developing innovative itineraries and packages, an ongoing focus on raising the level of quality and the depth of the visitor experience, and a heightened understanding of working with the international travel distribution network.

¹⁴ Tourism Australia, 2006, *A Uniquely Australian Invitation: The Experience Seeker*



Positioning the Region

Our Vision

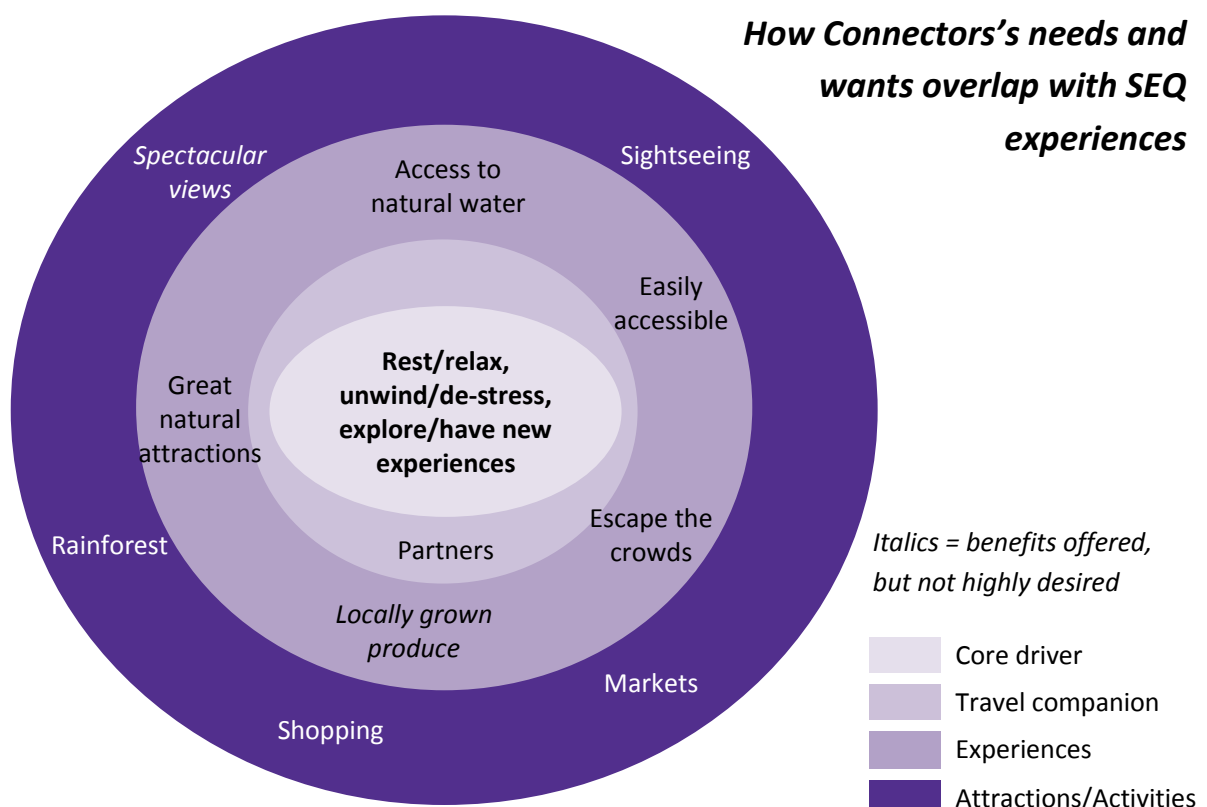
By 2020 Southern Queensland Country will be recognised as Queensland's premier country getaway destination known for its distinct seasons and regional flavours; where you can breathe deep and enjoy a taste of life in the country

The vision statement highlights the region's focus on domestic markets and clearly positions Southern Queensland Country as the rural getaway – the destination where visitors can ***slow down, breathe deep and enjoy a taste of life in the country*** – a positioning that is

particularly relevant to the Connectors (see illustration).

Looking toward 2020 and the challenge of both building domestic demand and diversifying into new markets, including international markets, there is a need to review the wording of the vision statement.

The current positioning is at the core of the framework for the strategy. Sub-regions, event organisations and individual businesses that can leverage this positioning are well placed to grow demand and interest in the region's product offerings.



Identifying Strategic Priorities

Our Objectives

1. To focus on developing new and strengthening existing hero experiences as a means of attracting new visitors and encouraging increased levels of expenditure.
2. To grow overnight visitor expenditure by 5% year over year.
3. To enhance the positioning of Southern Queensland Country as a destination that can deliver on its core brand promise – *slow down, breathe deep and enjoy a taste of life in the country.*
4. To build a strong and unified industry that works collaboratively to achieve sustainable growth.
5. To continue to use tourism as a means of strengthening the region's commitment to safeguarding and celebrating its cultural and natural heritage assets.



Establishing Strategic Priorities

To achieve these objectives, it is necessary to establish strategic priorities that can become the focus of combined efforts through to 2020. These priorities are in alignment with the six themes identified in *Destination Success: The 20 Year-Plan for Queensland Tourism*; and, the implementation of the associated strategies and tactics in this DTP will contribute to achieving the vision laid out in the 20-year state plan.

The process of establishing priorities for SQC was based on analysing the strengths and weaknesses of the region and developing consensus on the factors that needed to be addressed as a matter of priority if Southern Queensland Country is to reach the 2020 growth targets. With the six state wide themes providing the context; and, keeping the market positioning and the needs and wants of the primary markets in mind, together with the needs of the industry, the planning process identified the following priority areas for further action.

DESTINATION SUCCESS

The six themes underlying the vision

- Build strong partnerships
- Preserve our nature and culture
- Deliver quality, great service and innovation
- Target a balanced portfolio of markets
- Offer iconic experiences
- Grow investment and access

1. **The culinary sector** and its potential to become a strong motivator for travel.
2. **National Parks** and the opportunities they present to develop unique **nature-based experiences** in the region and to strengthen emerging regional sectors such as sustainable mountain biking.
3. **The knowledge base of the industry** and the need to create a deeper understanding of experiential tourism and the process of building hero experiences, while at the same time exploring ways of fostering a greater level of maturity within the sector.
4. **The knowledge base of local governments, the business community and residents** in terms of understanding the economic value of tourism and its role in making communities more resilient, and in having a comprehensive awareness of attractions and visitor experiences within the community and wider region.
5. **Events** and their role in attracting visitors and in strengthening the sense of place associated with the region overall and its individual communities.
6. **The Indigenous sector** and its potential to add value to many existing products and to contribute to the overall positioning of the region and its hero experiences.
7. **Roads and related infrastructure**, including signage, with the emphasis on improving visitor safety, accessibility and the overall destination experience.
8. **Packaging** as a means of generating new demand, and increasing length of stay and visitor expenditure in the region.
9. **The quality** of all elements of the tourism product and the importance of raising service delivery standards.
10. **Digital connectivity** – to benefit travellers on the move and to promote the importance of a digital savvy industry operating in a commercial environment.

These are the priority areas as identified through industry consultation. The strategic and tactical implications of these priorities are discussed in the following section under the six themes from Destination Success

Table 4: Alignment of SQC Strategic Priorities with Destination Success Themes

SOUTHERN QUEENSLAND COUNTRY STRATEGIC PRIORITIES 2014-2020	Build strong partnerships	Preserve our nature and culture	Deliver quality, great service and innovation	Target a balanced portfolio of markets	Offer iconic experiences	Grow investment and access
1. Developing the culinary experience	✓	✓	✓	✓	✓	
2. Strengthen nature-based tourism activities and develop iconic experiences associated with the region's natural beauty	✓	✓	✓	✓	✓	✓
3. Expanding the knowledge base of industry	✓		✓	✓	✓	
4. Expanding awareness of tourism within communities	✓	✓	✓			✓
5. Expanding the events sector	✓	✓	✓	✓	✓	
6. Developing the Indigenous sector	✓	✓	✓	✓	✓	
7. Roads and related infrastructure	✓		✓			✓
8. Effective packaging	✓		✓	✓	✓	
9. Quality of the experience			✓	✓	✓	
10. Digital connectivity	✓		✓	✓		✓



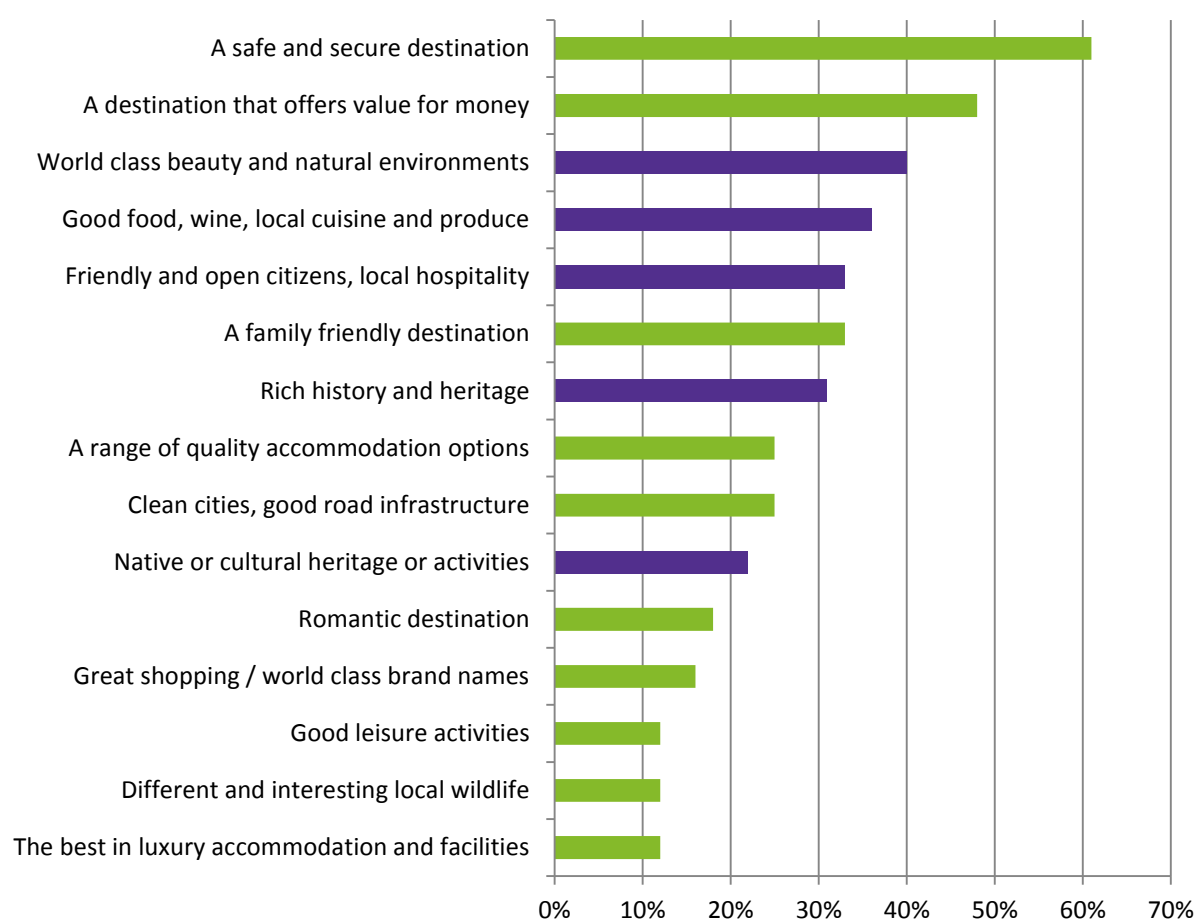
STRATEGIES FOR GROWTH

Strategies for Growth

While the key strategic areas all align with multiple state-level themes from *Destination Success*, they are presented in this section under the theme where their contribution is likely to have greatest impact. The ten priority areas are addressed, together with further tactics that will contribute to the success of the priority areas and the likelihood of achieving the DTP objectives.

In addition to aligning with *Destination Success* themes, many of the strategic priorities are likely to strengthen the factors that international markets consider as “very important when selecting a holiday destination”. This is a key rationale for focusing on them as the growth of international visitors and related expenditure is vital to the success of the DTP.

Figure 5: Destination attributes regarded as “very important” by international visitors when selecting a holiday destination¹⁵



Read as: 61% of respondents rate ‘a safe and secure destination’ as among the top 5 most important factors when choosing a holiday destination.

Factors that correspond with the hero experience themes in Southern Queensland Country are highlighted in blue.

¹⁵ Adapted. Source: Tourism Australia, 2013, 2020: *New research to help Australian tourism reach its potential*

1. Offering iconic experiences

Develop the culinary experience to strengthen the positioning of Southern Queensland Country as a destination known for its distinct regional flavours

OBJECTIVES

- Build recognition for SQC as a premier destination for regional flavours.
- Strengthen the linkages between tourism and the agricultural sector.
- Develop *authentic country life* and *four seasons* hero experiences.
- Align with the national objective of developing *a positioning for Australian food and wine to strengthen the tourism offering and tap into the global food and wine trend*¹⁶.

The world is simmering with culinary desire...

There's a healthy obsession with produce, too, as "provenance" becomes the new buzzword and food lovers demand a deeper connection to what they're eating and drinking. Seeking out real and authentic experiences, they relish the opportunity to meet winemakers, farmers, butchers and chefs, touching, tasting and testing their knowledge.

Restaurant Australia, 2013

SPECIFIC ACTIONS	PARTNERS	TIMING
1.1 The region has a strong agricultural sector but limited emphasis on local ingredients in food offerings. While work has commenced to strengthen the linkages between producer and chef through the efforts of the recently established Regional Food Network, the lack of support and resources to build on the initial momentum is undermining the progress that has been made or the RFN's ability to advance its goals and objectives. It is essential that this focus on developing linkages is recognised as a priority and supported sufficiently to enable growth of the culinary sector. This will require a review of existing processes and the development of appropriate mechanisms that will allow for the ongoing implementation of the Southern Queensland Country Regional Food & Wine Development Plan .	<ul style="list-style-type: none"> • DSDIP • DAFF • Regional Councils • Regional Food Network • SQCT • Industry 	Short-Medium Term
1.2 Highlight the unique regional flavours associated with the food and wine sector at key regional events, while ensuring that such events reinforce the positioning of the region and the quality of its visitor experiences. Similarly, continue to build awareness of the culinary sector out of region at consumer shows and marketing events.	<ul style="list-style-type: none"> • SQCT • RFN • Regional Councils • DSDIP • DAFF • Industry 	Short-Medium Term
1.3 Review the national strategy , <i>Restaurant Australia: why it's time to share our food and wine with the world</i> , and identify strategies and tactics that are applicable to the region.	<ul style="list-style-type: none"> • SQCT • TEQ 	Short Term
1.4 Explore opportunities to use regional flavours as a basis for developing new hero experiences that highlight the region's four seasons. In particular, focus on events that support the shoulder seasons, such as an autumn food festival in South Burnett.	<ul style="list-style-type: none"> • SQCT • TEQ • Regional Councils • Industry 	Short – Medium Term

¹⁶ Tourism Australia, September 2013, *Restaurant Australia: why it's time to share our food and wine with the world*

1.5	Support the development of new culinary and wine learning experiences for visitors . These experiences can be wide ranging and could include working with Local Indigenous communities to profile Indigenous foods and 'bush tucker'.	<ul style="list-style-type: none"> • Regional Councils • DSDIP • DTESB • SQCT • TEQ • Industry 	Short-Medium Term
1.6	Build knowledge of and highlight the stories associated with local foods and wineries , and with unique food and drink establishments. Encourage the integration of culinary elements into existing visitor experiences, such as the preparation of food hampers for visitors undertaking guided activities in National Parks.	<ul style="list-style-type: none"> • SCQT • TEQ • Regional Councils • DSDIP • DTESB • Industry 	Short-Medium Term
1.7	Build stronger linkages with the agricultural sector through: <ul style="list-style-type: none"> ○ Ensuring that VIC staff has an understanding of the agricultural calendar and can inform visitors on topics related to crops and in-season produce. ○ Promoting the development of authentic farmers' markets throughout the region. ○ Establishing "Meet the Maker" events. ○ Investigating opportunities to reduce red tape related to farm-gate sales. ○ Working with selected farmers to increase their understanding of tourism and related diversification opportunities including agri-tourism. This would benefit from the development of a mentorship programme. 	<ul style="list-style-type: none"> • Regional Councils • Industry • DAFF • DSDIP • DTESB • LTO/LTA 	Short-Medium Term
1.8	Develop an agri-tourism strategy for the region that takes an integrated approach to developing linkages with the agricultural sector and looks at specific issues, such as risk assessment and insurance requirements.	<ul style="list-style-type: none"> • DSDIP • Regional Councils • Industry • DAFF • DTESB • TSB Enterprise • LTO/LTA 	Short-Medium Term



Strengthen nature-based tourism activities and develop iconic experiences associated with the region's natural beauty

OBJECTIVES

- Elevate the profile of specific National Parks that have high potential to appeal to target markets.
- Build recognition for SQC as a premier destination for a range of nature-based activities and unique eco-adventure experiences.
- Develop and/or strengthen hero experiences that reflect the themes relating to *natural beauty*, *four seasons*, and *authentic country life*.
- Align with the *Queensland Ecotourism Plan 2013-2020* and leverage the Queensland initiative for developing new ecotourism facilities in National Parks.
- Build new visitor experiences and niche product around the region's existing trail base.

Australia's biggest strength is its world class nature, well regarded from all markets and core to our global tourism offering

2020: New research to help Australian tourism reach its potential

Queensland is Australia's number one ecotourism destination and recognised as a world leader in ecotourism, delivering best practice nature-based experiences that contribute to the conservation of our natural resources and cultural heritage.

Queensland Ecotourism Plan 2013-2020

SPECIFIC ACTIONS

- 1.9 **Focus on developing engaging nature-based experiences in specific National Parks and elevating the profile of these Parks** – namely Girraween National Park, Bunya Mountain National Park, Carnarvon National Park, Crows Nest National Park, Sun Down National Park and Main Range National Park, including the Queen Mary Falls area and Goomburra State Forest.
- These parks are conducive to developing a wide range of activities that would have a high level of appeal to both domestic and international markets, including birding, and night sky activities. The activities need to be in keeping with the capacity and character of the Park or Forest – e.g. Sundown National Park is somewhat unique in its potential for 4-wheel driving.
 - Explore opportunities to use the Parks to celebrate the four seasons in Southern Queensland Country.
 - Develop a themed emphasis for each Park to assist in creating distinctive experiences – e.g. interpretation of the night sky and the Indigenous story at Bunya Mountain NP, spring wild flowers and geological formations at Girraween NP, birding in Main Range NP (part of the World Heritage Site Gondwana Rainforests of Australia and part of the Scenic Rim Important Bird Area, designated by BirdLife International).
 - Promote growth in appropriate ancillary services. Review relevant business models, such as the holistic approach the O'Reilly Company has adopted in Lamington National Park – offering a range of eco-activities and catering for a broad cross-section of visitors, from business and leisure to niche groups such as weddings.
 - Develop collateral and/or web-based tools for special interest groups such as birders.
 - Continue to pursue opportunities for partnership-based marketing between QPWS and SQCT, and alignment of promotional communications.

PARTNERS

- NPRSR/QPSW
- DSDIP
- DTESB
- Regional Councils
- QTIC – operator skills/standards – Ecotourism Plan
- SQCT

TIMING

Short-
Medium
Term

1.10	Work with the NPRSR and other agencies to support the development of appropriate activities and facilities under the <i>Ecotourism Facilities on National Parks Implementation Framework</i> in all National Parks and State Forests within SCQ. Consideration should be given to developing and/or enhancing trails, signage, interpretive facilities and related day-use facilities – subject to feasibility. Strengthening facilities in individual National Parks and State Forests will offer further opportunity to market adjacent National Parks and State Forests in a way that leverages the more iconic destinations.	<ul style="list-style-type: none"> • NPRSR/QPWS • DSDIP • DTESB • SQCT 	Short-Medium Term
1.11	<p>Create and promote ‘slow cycle’ opportunities that will appeal to the primary targets, particularly the Connectors.</p> <ul style="list-style-type: none"> ○ The Granite Belt ‘Stanthorpe to Ballandean Bike Trail’ provides a prototype for this priority, with its emphasis on linking the bike trail with wineries, restaurants and local attractions. ○ In designating roads that are shared with motor vehicles, Regional Councils should assess all safety risks and review signage and related infrastructure needs. Where relevant, this will require input from the Department of Transport and Main Roads. 	<ul style="list-style-type: none"> • Regional Councils • DTMR • DSDIP • SQCT • LTO 	Medium-Long Term
1.12	<p>Assess opportunities to further develop and promote mountain biking. The region has examples of good mountain biking trails, but lacks an overall approach to developing mountain biking as a niche sector. Moving forward will require leadership from Regional Councils in partnership with local mountain biking clubs and associations (national, state and local). By way of further information:</p> <ul style="list-style-type: none"> ○ There are a range of destinations that can be reviewed as part of the process of developing mountain biking as a sector that will benefit the tourism industry. Examples include: <ul style="list-style-type: none"> ▪ <u>7 stanes mountain bike trails</u> in Scotland; ▪ <u>Ride Rotorua</u> in New Zealand; ▪ <u>Moab in Utah</u>, USA – a destination that put itself ‘on the map’ through mountain biking; ▪ <u>Cairns, Queensland</u> – now seeking to differentiate itself as a mountain biking destination. ○ A <u>handbook</u> on developing mountain biking as a tourism sector has been produced by Tourism BC (now Destination British Columbia) and provides a broad overview on how to develop the sector. Other resources are available from the <u>International Mountain Bicycling Association</u>. ○ All examples highlight the importance of good web resources and, in certain cases, print collateral to promote the trails. ○ Secure mountain biking events. 	<ul style="list-style-type: none"> • Regional Councils • NPRSR/QPWS • TEQ • SQCT • DTMR • National, state and local mountain biking clubs and associations 	Short-Medium Term
1.13	As a preliminary step to developing mountain biking and nature-based activities, undertake a trail audit as a basis for assessing opportunities and identifying areas where action is needed to improve the visitor experience. The audit should consider issues relating to signage, maintenance, access to trail heads and related infrastructure, connectivity, mapping requirements, and any issues associated with user conflict. Trails, whether long-distance	<ul style="list-style-type: none"> • Regional Councils • DTMR • Mountain biking associations 	Short-Medium Term

or shorter, provide the basis for a wide range of nature-based activities, including hiking, horse-riding and motorized trail use. Destinations that have succeeded in building strong trail infrastructure have strengthened their overall tourism industry considerably and created new niche products. An excellent example of a community approach to developing, maintaining and promoting trails can be seen in the Shuswap Region in British Columbia with the work of the Shuswap Trails Alliance.

1.14	Assess the scope for profiling the long distance trails that run through the region, including the Bicentennial National Trail and the Brisbane Valley Rail Trail.	<ul style="list-style-type: none"> Regional Councils Mountain biking associations 	Short-Medium Term
1.15	<p>Developing an emphasis on cycling and mountain biking creates potential entrepreneurial opportunities for rental and support services.</p> <ul style="list-style-type: none"> Accommodation providers will need to be encouraged to provide bike friendly features, particularly secure storage, and promote the availability of such facilities. Opportunities exist to further develop organised cycle trekking tours 	<ul style="list-style-type: none"> Industry DTMR Private enterprise 	Medium Term
1.16	Work with local organisations to assess the potential to grow horse-related tourism through the trail network. The Brisbane Valley Rail Trail, the Bicentennial National Trail and the stock routes offer opportunity to further develop recreational and commercial horse riding, competitions and events where overnight stays can be generated.	<ul style="list-style-type: none"> Regional Councils DSDIP Industry/Special interest groups 	Medium Term
1.17	Work in partnership to identify opportunities to raise the profile of the region's water features . Activities such as fishing and boating, and opportunities to promote activities with fresh market appeal such as stand-up paddling, are all in line with the positioning of SQC and will be of interest to the key markets.	<ul style="list-style-type: none"> Regional Councils DTMR 	Ongoing to 2020
1.18	<p>Review the feasibility report for the Toowoomba Quarry Gardens initiative and undertake further analysis of this project given its potential to become a 'wow' attraction for Southern Queensland Country, a key 'driver of demand' for Toowoomba, and its ability to markedly strengthen the City's positioning as the "Garden City".</p> <ul style="list-style-type: none"> In the analysis, review the tourism impact of iconic destinations such as Butchart Gardens on Vancouver Island, British Columbia, Canada (50 acre garden in a former limestone quarry now attracting over one million visitors annually and designated a National Historic Site of Canada); and the Eden Project in Cornwall, England (covers 35 acres within an old china clay pit – attracting approximately one million annually); and Singapore's Gardens by the Bay that captures the essence of Singapore as the premier tropical garden city with the perfect environment to live, work and play – making Singapore a leading global city of the 21st Century. 	<ul style="list-style-type: none"> Toowoomba Regional Council DSDIP DTESB TSB Enterprise 	Short-term initially / likely to be a long-term project

2. Preserve our nature and culture

Strengthen the visitor experiences associated with the region's history and heritage and raise the profile of Indigenous experiences

OBJECTIVES

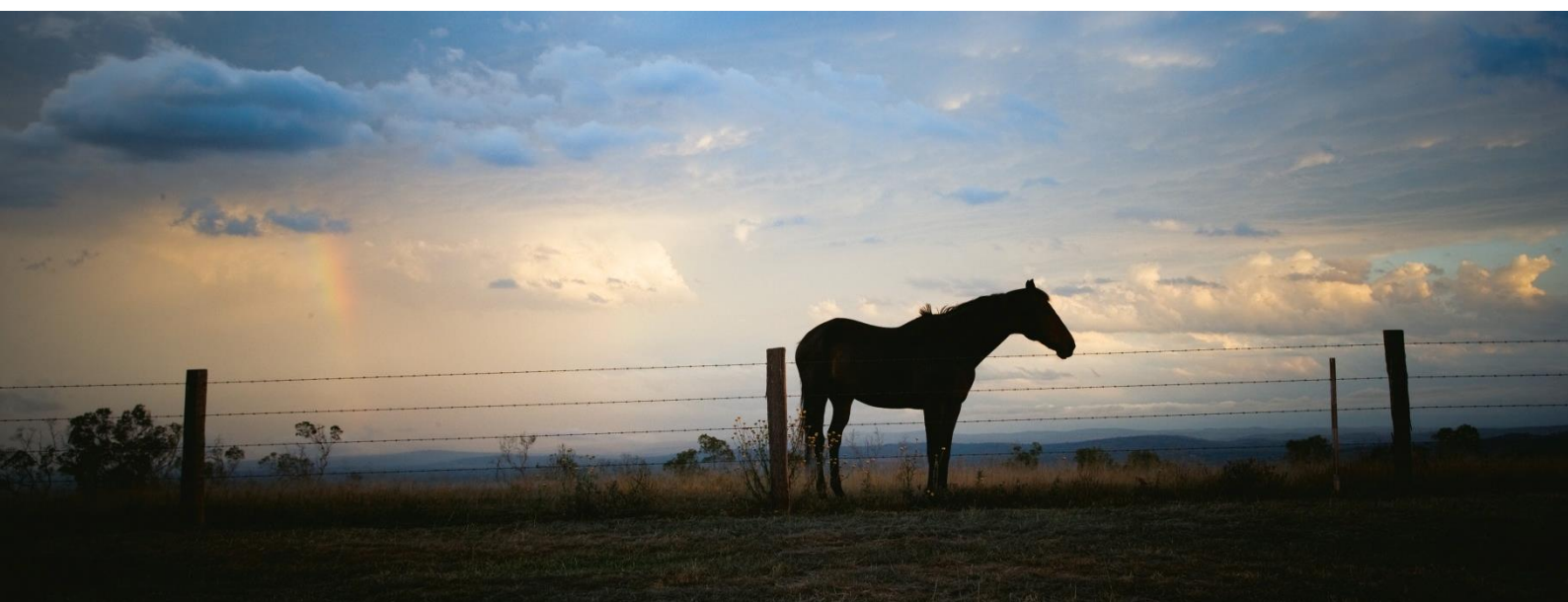
- Build dynamic hero experiences around the history and heritage theme, including best practice interpretation.
- Provide visitors with the opportunity to establish an emotional connection with the destination and local lifestyles.
- Nurture and raise the profile of Indigenous experiences.
- Encourage communities to celebrate their distinctive stories.

The experience being sought refers to a desire to understand how a destination differs from one's own in terms of culture, heritage, history and identity, and the need to appreciate the 'essence' of the place and enjoy the sensation of being where things are real and original.

Tourism Okanagan Tourism Association

SPECIFIC ACTIONS	PARTNERS	TIMING
<p>2.1 Develop the steam train product into a unique regional hero experience with connectivity from Toowoomba to Wallangarra. This is a potentially large and longer term project. Currently there are a number of disparate elements involving a range of volunteer interest groups and rail enthusiasts, including the Downs Steam Tourist Railway and Museum and the Southern Downs Steam Railway. The various groups have faced many logistical and financial obstacles, and the challenge of building an iconic product is significant. Nevertheless, it could be advanced through a regional approach to developing the experience.</p> <ul style="list-style-type: none"> ○ The Warwick Chamber is currently seeking to initiate a project that would revitalise the railway station precinct in Warwick as a visitor centre and a rail attraction. This interest, together with the efforts in Wallangarra and Toowoomba, and the work of the Southern Downs Steam Railway need to be looked at from a coordinated perspective. ○ The role of potential partners such as Queensland Rail needs to be determined. ○ This project holds significant potential to showcase the region's food and wine as part of the cultural heritage experience. It is the type of experience that would have particular appeal for the international market and would be of value in motivating travel to the region. ○ There is a need to undertake a feasibility analysis and develop a business case for the expansion of the rail experience. Regional Councils should consider collaborating to undertake this analysis. Goldfields Railway, Castlemaine, Victoria provides an example of an historic rail experience linking a number of communities on route. ○ As Austrade's <i>Demand-Driver Infrastructure</i> programme moves forward, it may offer the opportunity for funding for this initiative given its regional nature and potential to impact a number of communities and businesses. 	<ul style="list-style-type: none"> • Queensland Rail/DTMR • Downs Steam Tourist Railway and Museum; Southern Downs Steam Railway; • Warwick Chamber • DIRD – Federal Gov. • Regional Councils 	Long-Term

2.2	<p>Explore opportunities to develop strong regional heritage themes that can tie regional heritage product together and increase visibility of individual attractions. The region has a number of important historic sites and buildings and cultural attractions, but individually each is facing challenges – particularly those in rural locations.</p> <ul style="list-style-type: none"> Where relevant, work with heritage owners and custodians, community organisations and local governments to promote heritage sites as settings for community and regional events, and encourage event organisers to strengthen events through cross-promoting with other related activities. 	<ul style="list-style-type: none"> Regional Councils Heritage attraction stakeholders 	Short-Medium Term
2.3	<p>Elevate Indigenous stories and work toward creating new Indigenous commercial opportunities that can be integrated into mainstream tourism. There is the potential to add value to existing visitor experiences through incorporating an Indigenous component, such as guided services or traditional foods. This will also assist in building new capacity.</p> <ul style="list-style-type: none"> Moving forward will require developing capacity and working with Indigenous stakeholders to assess new business opportunities. The potential to create partnerships between existing heritage or nature-based businesses and Indigenous partners should be explored, and projects piloted as case-studies, as and when appropriate funding opportunities are identified. Examples include guided services at Bunya Mountain National Park and a cuisine add-on component to cruises on the Macintyre River. DNPRSR/QPWS will assist through connecting SQCT with local Indigenous communities and supporting the building of relations for this initiative. 	<ul style="list-style-type: none"> NPRSR/QPWS SCQT QTIC DATSIMA TEQ Local Indigenous communities Relevant industry partners 	Medium-Term
2.4	<p>Continue to encourage the expansion of participation in the “Hand-Made in Country” initiative and the use of this initiative to enhance existing or develop new themed events and visitor experiences.</p>	<ul style="list-style-type: none"> Members of the consortium DSITIA SQCT 	Ongoing to 2020



Create and deliver a balanced portfolio of events that showcase the region's hero experience themes and celebrate unique attributes of local communities

OBJECTIVES

- Generate economic benefit and increased visitation for local communities.
- Animate the region as a destination and reinforce the hero experience themes and positioning of Southern Queensland Country.

Events can create memory-driven moments in our destinations. Queensland needs a vibrant and engaging events program—a program that will build upon unique experiences in destinations.

Destination Success

SPECIFIC ACTIONS	PARTNERS	TIMING
2.5 Encourage all event organisers to list tourism events on the Australian Tourism Data Warehouse. Event listing is a free service and ensures that Tourism Australia, TEQ, SQCT and over 75 other tourism websites will be profiling the events. SQCT's regional calendar of events will then become a more effective planning tool for event organisers and visitors alike, and will lessen the current concerns regarding lack of communications between organisers.	<ul style="list-style-type: none"> • LTOs • SQCT 	Short Term and ongoing to 2020
2.6 Support the implementation of the event strategy¹⁷ through undertaking a biennial event audit. Continue to identify the strengths and weaknesses of the region's iconic events and festivals, and any gaps – particularly in relation to opportunities to promote the hero experience themes. Use the findings to determine appropriate strategies for the further development of events as a key driver of tourism to the region, including the development or hosting of a major events that may be considered aspirational. Examples: Asia-Pacific Culinary Championships; Asia-Pacific Slow Food Festival; World Equestrian Games.	<ul style="list-style-type: none"> • SQCT • TEQ • Regional Councils • LTO/LTA 	Ongoing to 2020
2.7 Regard events as showcase moments. Visitors attending events should leave feeling compelled to return and experience the region further. All stakeholders should explore the potential of events to promote the attributes of the region.	<ul style="list-style-type: none"> • Event organisers • SQCT • Regional Councils • TEQ 	Ongoing to 2020
2.8 Use events to further highlight the four seasons. Focusing on seasons and seasonal flavours will assist in further differentiating SQC as a destination. Festivals such as Jumpers and Jazz already have a strong 'winter' theme. Opportunities to establish new seasonally themed events should be identified and pursued or encourage by local tourism stakeholders.	<ul style="list-style-type: none"> • Regional Councils • SQCT • TEQ 	Ongoing to 2020
2.9 Encourage event organisers to undertake visitor profile and economic impact analysis of events. Data on visitor origin and expenditure should be collected on a systematic basis to being building an understanding on the value of events, a profile of event visitors and a corresponding database. Funding partners should consider requesting this type of research as part of funding criteria.	<ul style="list-style-type: none"> • Regional Councils • SQCT • TEQ • LTO/LTA 	Ongoing to 2020

¹⁷ Forthcoming in 2014-15

3. Deliver quality, great service and innovation

Commit to continuously improve the quality of the experience we provide to our visitors

OBJECTIVES

- Develop an understanding of the clear link between the visitor experience and economic value throughout the industry.
- Monitor satisfaction.
- Increase the number of accredited businesses.
- Develop a strong 'sense of place' within communities based on quality of visitor services and related infrastructure.

In a highly competitive industry, the quality of the visitor experience is the key to success. It's what sets businesses, tourism products and regions apart – and it's what delivers the brand promise...

It's smart to invest in quality visitor experiences because that's what travellers are increasingly wanting - and they're willing to pay for it.

Tourism Tasmania

SPECIFIC ACTIONS	PARTNERS	TIMING
<p>3.1 Focus on promoting quality and great service as critical success factors in the growth of tourism and achievement of the 2020 targets. Assist operators in understanding that with shorter stays, there is an even greater need to elevate the quality of the experience in order to achieve greater expenditure. Highlight the role quality plays in prompting word-of-mouth and social media communications, and equally the implications of poor service on these communication channels.</p> <ul style="list-style-type: none"> ○ Encourage participation in relevant accreditation programmes. This voluntary process will enhance an operator's commitment to quality business practices and professionalism in all aspects of the enterprise. ○ Over the next two years (by 2016), the Queensland Tourism Awards will introduce a new eligibility criterion requiring tourism operator entrants to be certified or accredited. 	<ul style="list-style-type: none"> • QTIC • TEQ • SQCT • Regional Councils 	Short-Term
<p>3.2 Ensure that accredited businesses are recognised and distinguished from other operators, and highlight accolades and achievements in respect to the delivery of quality.</p>	<ul style="list-style-type: none"> • QTIC • TEQ • SQCT • Regional Councils 	Short-Term
<p>3.3 Explore opportunities to measure visitor satisfaction within the destination. Establish baseline data and monitor satisfaction.</p> <ul style="list-style-type: none"> ○ Continue to undertake regional brand health checks and campaign tracking. ○ Identify areas of dissatisfaction and work with operators and communities to address these issues. 	<ul style="list-style-type: none"> • TEQ • SQCT • VICs • LTOs • Industry 	Short-Medium term, then ongoing monitoring
<p>3.4 Encourage VICs to follow-up on all quality concerns brought to their attention. Ensure that VICs have a policy in place to monitor the level of concern and the remedial action taken.</p>	<ul style="list-style-type: none"> • TEQ • Regional Councils • SQCT • VICs • Industry 	Short-Medium term, then ongoing monitoring

3.5	All partners need to continue to lobby for changes in industrial relations – particularly those relating to penalty rates. All attempts should be made to move increasingly toward a 7-day trading week, particularly in communities seeking to attract visitors for weekend short breaks.	<ul style="list-style-type: none"> • QTIC • SQCT • Industry 	Ongoing to 2020
3.6	Maintain a strong ‘sense of place’ through the implementation of beautification programmes, local signage policies, restoration/development of heritage streetscapes and tourism precincts, development and maintenance of ‘gathering spaces’ and upkeep of all public facilities, including public toilets.	<ul style="list-style-type: none"> • Regional Councils 	Ongoing to 2020



4. Targeting a balanced portfolio of markets

Identify emerging opportunities to target new markets and develop innovative packages that will stimulate new demand

OBJECTIVES

- Develop an enhanced understanding of the needs and wants of domestic and international target markets.
- Develop and promote new packages.
- Work collaboratively to attract new fly-in markets with the development of the Brisbane West Wellcamp Airport.
- Identify new approaches to increasing the value of the region's major drive routes.

By better understanding what motivates consumers in our key target markets, we're clearly in a much better position to craft our message to convert awareness of our country into visits. It also gives Australian tourism operators valuable insights into how to adapt and develop their business to best attract new visitors.

Tourism Australia

SPECIFIC ACTIONS	PARTNERS	TIMING
<p>4.1 Use mentoring and training events to build an enhanced awareness of the needs and wants of existing and emerging market segments. This is particularly important with regard to developing hero experiences and understanding the expectations of potential new international markets, such as Singapore and Indonesia.</p> <ul style="list-style-type: none"> ○ The region still has insufficient range of quality iconic product, or accommodation to rigorously pursue new international markets. This is an area of weakness that needs to be understood and addressed where possible in coming years. ○ Continue to assess the potential for developing innovative packages for the short break drive domestic market and the emerging fly-in market. ○ The concepts of packaging, market readiness for international markets and working with both domestic and international travel trade are still poorly understood. In recent years TEQ has been working with a small number of operators, but there is a need for further capacity building in this area. ○ Use proposed Triparte agreement between TEQ/SEQCT/TEQ to identify needs and clarify roles in delivery of industry and experience development activity. 	<ul style="list-style-type: none"> • TEQ • TA • SQCT • QTIC • ATEC 	<p>Short-Medium Term, and then ongoing</p>
<p>4.2 With the advent of the Brisbane West Wellcamp Airport, there are new opportunities to attract a fly-in market – VFR, the leisure market and business travellers from Sydney and Melbourne (subject to route confirmations). While it is early days, the preliminary assessment of the market by the developers of the airport has indicated that the Airport could generate annual passenger traffic of 1.4 million over four prospective trunk routes (Sydney, Melbourne, Brisbane and Cairns). Building on these potential opportunities will require working collaboratively to secure the air routes and carriers, maintain airlift capacity, and develop appropriately priced and marketable packages.</p> <ul style="list-style-type: none"> ○ With the development of the Airport, it is important to see it as a gateway to the region and to ensure it is regarded as such 	<ul style="list-style-type: none"> • BWW Airport • TEQ • DSDIP / DTESB • TSB Enterprise • SQCT • Regional Councils 	<p>Ongoing to 2020</p>

	<p>with adequate visitor information services, transportation options, and access to Toowoomba hotels.</p> <ul style="list-style-type: none"> ○ Support the attraction of investment for the development of new, preferably branded, 4 or 5 star hotels in the vicinity of the Airport and in Toowoomba. This action is particularly important if the decision is made to move forward with building a new Convention Centre in Toowoomba. ○ As markets expand and diversify with new air routes, ensure the brand promise and message continues to be applicable. Refresh if required, and funding permits. 		
4.3	<p>Work with neighbouring RTOs – Brisbane Marketing and the Outback Queensland Tourism Association Inc. to identify partnership marketing opportunities that will contribute to the dispersal of visitors within Queensland and to extending lengths of stay. Developing themed campaigns and leveraging unique out-of-region events, such as international sporting events in Brisbane or the Gold Coast will be mutually beneficial.</p> <ul style="list-style-type: none"> ○ Work with Brisbane Marketing to create ‘graduation’ itineraries that would appeal to international students and their families seeking to mark the occasion. ○ Brisbane is anticipating an ongoing growth of hotel rooms (approximately 300-350 per annum through to 2020). With the increase in visitation and the growing position of Brisbane as a gateway into Australia, there are opportunities to build on Brisbane Marketing’s country hinterland experience and disperse visitors further west into Southern Queensland Country. Joint marketing campaigns and itineraries that would motivate travel inland, would enrich the visitor experience and benefit SCQ businesses. 	<ul style="list-style-type: none"> • SQCT/ BM/ OQTA • TEQ 	Short-Medium Term then ongoing to 2020
4.4	<p>The region has a number of relationships with international destinations, such as sister cities and SQCT’s relationship with the Thompson Okanagan (British Columbia, Canada). These associations should be used to raise the profile of the region and where possible to attract new visitors.</p>	<ul style="list-style-type: none"> • SQCT • Regional Councils 	Short-Medium Term then ongoing to 2020
4.5	<p>Create a greater level of awareness of SQC experiences among TEQ staff, particularly the international terms. Raising awareness is essential if TEQ International Directors are to play a stronger role in promoting and ‘selling’ the destination to overseas travel trade and media.</p>	<ul style="list-style-type: none"> • TEQ & SQCT • Industry 	Ongoing
4.6	<p>Moving forward with the development of a new conference facility in Toowoomba will open up opportunities to grow business tourism and to, in turn, use this sector to grow leisure travel – through pre- and post-conference leisure itineraries and through inspiring repeat visitation. Business events attract a higher-yield visitor, and developing the meetings and conventions market will strengthen the region’s ability to meet the 2020 target.</p>	<ul style="list-style-type: none"> • Toowoomba Regional Council • DSDIP • Toowoomba Conferences • SQCT 	Medium-Long Term

5. Build strong partnerships

Expand the knowledge base of the industry and build its capacity to deliver hero experiences

OBJECTIVES

- Build cohesion within the industry and an internal awareness of the region's unique features and visitor experiences.
- Create a strong collaborative culture and a dynamic partnership approach to developing tourism and capitalising on emerging opportunities.
- Develop a high level of capacity within the industry to create and deliver memorable experiences.
- Ensure industry has an understanding of market segments and the implications of the differing needs and wants.

The Visitor Experience
A tourism 'experience' is the emotional feeling or personal achievement a visitor derives from the purchase, participation or consumption of a tourism product – accommodation, attractions or tours.
The 'tourism product' is what the customer buys; the 'tourism experience' is what they remember.

Tourism and Events Queensland

SPECIFIC ACTIONS	PARTNERS	TIMING
5.1 Support the role of SQCT as the peak regional tourism organisation through working effectively with it as marketing partners. Clear recognition of roles and responsibilities of the various partners and stakeholders, including Regional Councils and LTOs will increase synergies gained from working together and will reduce duplication of services and activities.	<ul style="list-style-type: none"> • Regional Councils • Chambers of Commerce • LTOs/LTAs • TEQ • Industry 	Ongoing
5.2 Recognise the value of supporting the SQ Tourism Industry Annual Conference (SQTIC) as a key networking and capacity building opportunity and a means of creating a strong 'sense of community' within the disparate elements of the tourism industry. SQTIC is recognised as the primary tourism conference for small operators within the region. <ul style="list-style-type: none"> ◦ Work with QTIC in regard to workforce and industry development issues. 	<ul style="list-style-type: none"> • TEQ • Regional Councils • LTOs/LTAs • Industry • QTIC 	Short-Term then ongoing to 2020
5.3 Encourage a greater level of uptake on SQCT professional development opportunities and promote an ethos among stakeholders that values professional development. Strong participation in training opportunities on the digital economy, the development of hero experiences and in areas relating to yield management, pricing and packaging are critical in developing and delivering market-ready experiences and connecting effectively with new and existing markets. The <i>SQC on Tour</i> programme is a significant element in the current professional development programme and should be maintained. Developing capacity at the operator level (business owners and employees) will be critical if the region is to deliver effectively on its priorities and succeed in reaching the 2020 targets.	<ul style="list-style-type: none"> • LTOs/LTAs • Chambers of Commerce • Regional Councils • Industry • TEQ • QTIC • DETE • DE – Federal Gov. 	Short Term – ongoing annually
5.4 Promote participation in mentoring programs and encourage businesses to develop measurement indicators. Identify and promote success stories at networking events and in SQCT communications.	<ul style="list-style-type: none"> • LTOs/LTAs • Chambers of Commerce • Regional 	Ongoing

		<ul style="list-style-type: none"> Councils Industry TEQ DETE DE –Federal Gov. 	
5.5	<p>Develop an in-depth understanding of the region's unique attributes, key stories and visitor experiences.</p> <ul style="list-style-type: none"> Work toward developing a comprehensive database for the region. While businesses and events listed in Australian Data Warehouse can be readily accessed, this does not provide insight into the region's unique features, personalities, stories and full range of experiences. Regional Councils should take a lead role in developing their own database, with SQCT assisting to consolidate the overall regional database based on the submitted sub-regional components. 	<ul style="list-style-type: none"> Regional Councils SQCT VICs 	Short-Term then ongoing
5.6	<p>Establish opportunities for stakeholders and VIC staff to engage in familiarisation trips.</p>	<ul style="list-style-type: none"> Regional Councils SQCT VICs 	Short-Term then ongoing



Build a strong understanding of the value of the tourism industry among Regional Councils, the business community and local residents

OBJECTIVES

- Develop an appreciation of the significance of tourism to the local and regional economy.
- Create a strong awareness of visitor experiences and attractions among local residents and the business community.
- Build strong local political support for tourism as a key economic sector and one of the four pillars of the Queensland economy.
- Create welcoming host communities.

Local communities form the setting of almost every tourism product and visitor experience.

A community that recognises the benefits arising from tourism and consequently embraces tourism activity can provide local operators with a competitive advantage by enhancing the overall experience of a destination.

Tourism and Events Queensland,
Working with Communities

SPECIFIC ACTIONS	PARTNERS	TIMING
5.7 Continue to repackage TEQ data on the value of tourism and present to Regional Councils and the wider community to ensure that there is a general understanding of the economic benefits of tourism. <ul style="list-style-type: none"> ○ Similarly, SQCT will work with Chambers of Commerce to increase their understanding of the role and value of tourism within the business community. 	<ul style="list-style-type: none"> • QTIC • TEQ • TRA • SQCT • Chambers of Commerce 	Ongoing to 2020
5.8 Encourage reporting of data and mechanisms for monitoring industry performance , and incorporate these into the overall regional calculations of overnight visitor expenditure for the region.	<ul style="list-style-type: none"> • QTIC • TEQ • TRA • SQCT • Chambers of Commerce 	Ongoing to 2020
5.9 Encourage alignment in approaches to developing and promoting tourism. This is important in developing a collaborative approach to building tourism. <ul style="list-style-type: none"> ○ Leverage the regional SQC brand in local marketing initiatives. 	<ul style="list-style-type: none"> • Regional Councils • LTO/LTA 	Short-Medium Term
5.10 Ensure that local and sub-regional tourism strategies are in alignment with the regional strategy.	<ul style="list-style-type: none"> • Regional Councils 	Short-Medium Term
5.11 Create biannual opportunities for SQC Regional Councils to convene together to discuss strategic priorities in tourism and progress on the implementation of this plan. Effective collaboration is essential to growing tourism successfully across the region.	<ul style="list-style-type: none"> • SQCT • Regional Councils 	Short Term and then ongoing to 2020
5.12 Identify new approaches to moving forward with strategic tourism priorities. One option to explore further is a more comprehensive and formal integration of tourism into the mandate of regional economic organisations. The approach that has been taken by the Remote Area Planning and Development Board provides a good model, where the Board is represented on Outback Queensland Tourism Association's Board and plays a key	<ul style="list-style-type: none"> • SQCT • Regional Councils 	Short Term and then ongoing to 2020

role in the implementation of the Central West Outback Queensland Tourism Association's tourism plan and in the implementation of strategies that align with the Queensland Drive Strategy. The option of working through the South West Regional Development Association Inc. (SWRED) and the Downs and Surat Basin Alliance (DASBAC) to pursue product development initiatives that are outlined in this DTP, and to consolidate the input of Regional Councils should be explored. Similarly, there is further potential for Toowoomba and Surat Basin Enterprise (TSBE) to work with SQCT in investigating opportunities where TSBE can support the development of tourism in the region.

5.13 Support local initiatives to develop tourism ambassador programmes and promote tourism awareness initiatives that will raise residents' local and regional knowledge of attractions and experiences.	<ul style="list-style-type: none"> • LTOs/LTAs • Regional Councils • SQCT • QTIC 	Ongoing
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6. Grow investment and access

Continue to pursue opportunities to improve access to and within the region, and overall connectivity, including digital connectivity

OBJECTIVES

- Work toward improving ease of access to and within the region in a way that contributes to the visitor experience, facilitates safe travel and encourages dispersal of visitors.
- Ensure that signage for travellers is adequate.
- Build competitive digital connectivity and encourage businesses to be technologically innovative.

We need to focus on improved connectivity, both physical and virtual. How easily visitors can get to and around our destinations has a big impact on visitor dispersal. ...we need the digital infrastructure and services in place to enable visitors to search for experiences, conduct business and engage with their social networks.

Destination Success

SPECIFIC ACTIONS	PARTNERS	TIMING
6.1 Regional Councils to continue to develop a combined approach to advocacy with regard to roads and related infrastructure: e.g. the new Toowoomba Second Range Crossing will improve the overall visitor experience. <ul style="list-style-type: none"> ○ Work with the Department of Transport and Main Roads to prioritise particular issues concerning roads and to agree on a proposed timeline and course of action. ○ Identify approaches to increasing safe travel on Tier 2 roads that are shared with commercial trucks. 	<ul style="list-style-type: none"> • Regional Councils • QTIC Drive Alliance 	Ongoing to 2020
6.2 Continue to support the longer-term development of a passenger rail service from Brisbane to Toowoomba .	<ul style="list-style-type: none"> • Regional Councils • DTMR • DTESB • TSB Enterprise 	Ongoing to 2020
6.3 Work with public transportation authorities to create public transportation linkages with the new airport .	<ul style="list-style-type: none"> • Regional Councils • DTMR • DTSBE • TSB Enterprise 	Ongoing to 2020
6.4 Work together as Regional Councils to identify alternate routes for travellers . Consider suitability of purpose in the analysis and prioritise upgrading projects. Ensure that directional signage is adequate and that there are appropriate rest stops.	<ul style="list-style-type: none"> • Regional Councils • DTMR • DTSBE 	Short-Medium Term
6.5 Undertake a signage audit within each Regional Council area – remove out-of-date signage and re-skin or install new signage where required.	<ul style="list-style-type: none"> • Regional Councils • DTMR • DTSBE • QTIC Drive Alliance 	Short Term
6.6 Discuss the options for using social media to update travellers on road conditions – this would create more timely and accurate information than the current procedures utilised by RACQ.	<ul style="list-style-type: none"> • Regional Councils • DTMR • DTSBE 	Short Term

6.7	<p>Undertake a connectivity audit and use the results to inform travellers of ‘black spots’ and highlight availability of Wi-Fi coverage. The latter is particularly important to international travellers.</p> <ul style="list-style-type: none"> ○ Build on the work South Burnett Regional Council has undertaken on the identification of black spots. 	<ul style="list-style-type: none"> • Regional Councils • DTSBE 	Short-Medium Term
6.8	<p>Continue to advocate for improvements to the region’s digital connectivity.</p>	<ul style="list-style-type: none"> • Regional Councils • DTSBE 	Ongoing



Resources for Implementation

Reaching the 2020 'stretch' targets cannot be achieved without the commitment of funds and resources to the fore-mentioned strategic priorities. Progress has been made in building market awareness for the region and in initiating capacity building and mentorship programmes. It is important that the resources for these initiatives are maintained to meet increasing need and demand, as permitted by the constraints of the economic environment and the decision-making parameters of the various agencies involved in tourism development and marketing.

Notwithstanding, critical areas include:

- All current funding for SQCT – both from TEQ and from all Regional Councils and partners. The work of the RTO in building market awareness and in increasing interest in travel to the region is a critical base to be leveraged by all other marketing partners, including LTOs, and will assist in maximising the return on the marketing activities of these partners.

- All current TEQ funding for the development of hero experiences and for the implementation of a comprehensive mentorship programme.
- The existing *SCQ on Tour* programme – this is an important capacity building initiative and is vital in helping industry understand the need for raising quality standards, developing engaging experiences, undertaking targeted and integrated marketing communications, and broadening their professional networks.

In addition, there is a need for further funding to support industry development and education needs that will arise from the implementation of this DTP and its emphasis on doubling the value of overnight visitor expenditure. Current training emphasises are likely to expand as the industry pursues new markets and seeks to become a more mature and cohesive economic sector.



Enabling Success

Success is achievable. While the targets are certainly recognised as a 'stretch', a shared commitment to pursuing the goal of reaching \$1 billion in overnight visitor expenditure by 2020 will invariably have a catalytic effect on the growth of the industry and the development of the region as a destination. Moving forward in each of the strategic priority areas will make a difference and will increase the market appeal and profitability of individual businesses and the region as a whole. Clearly there are a number of infrastructural projects that could have a significant impact on visitation levels. The development of the Brisbane West Wellcamp Airport, the growth of new commercial accommodation, and the development of a new convention centre in Toowoomba are areas in particular that will have a major impact on realising the objectives of this DTP.

However, it is fitting to highlight the following critical success factors that are applicable across the region and will play a key role in enabling success of this DTP:

1. A commitment to the principle and practice of partnership and collaboration, and to ensuring that the roles and responsibilities of all stakeholders dovetail and complement, rather than duplicate or compete. This is particularly important within a regional context where there are a range of local, regional and state stakeholders with diverse mandates. Recognising the common purpose behind this DTP in relation to tourism, and working as a team is a principle that must be embraced by all if success is to be truly achievable.
2. A commitment to maintaining existing levels of funding and to securing additional funds to ensure that the actions outlined in this DTP can move forward.
3. Recognition of changing market trends and the need to invest in quality service and the development of engaging and immersive hero experiences that will appeal to current and new target markets, and in the mentorship of individual operators.
4. A strategic approach to developing the meetings and conventions market, given the higher yield that can be achieved through growing business tourism.
5. A regional perspective that understands the benefits that can be gained from building Southern Queensland Country as a strong and competitive destination with a high level of market appeal.
6. A commitment to deepening the maturity of the industry and in generating a greater level of community support for tourism.
7. A focus on monitoring, measuring and reporting on the implementation of this plan, and an emphasis on celebrating success. Recognition of success will breed success.





APPENDICES

Appendix 1: Aligning with State and Regional Policies

Domestic Market Segments

Extract from Tourism Queensland, 2011, *Understanding our Consumers: TQ's Domestic Market Segmentation*

Traditional methods of research define consumers by demographic and life-stage variables that assume everyone in the same age group or with the same income act in a similar way. This approach can make marketing and advertising a hit or miss proposition when it comes to achieving resonance within consumer groupings. It is more productive to understand the consumers' needs and wants, thus maximising the impact of the marketing dollar and communicating more effectively with the consumer¹⁸.

Connectors - They see holidays as a chance to connect with the people they care most about. They will often compromise their own preferences in terms of activities to ensure everyone has a good time. It's about what is real and what's important.

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

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

Stylish Travellers - A holiday is a chance to demonstrate their achievements both to themselves and others. They do this by seeking out unique and exotic experiences and products, making them feel discerning, stylish and successful.

Self Discoverers – Holidays are about discovery, nourishment and enrichment of the self (physically and intellectually). They seek to immerse themselves in holiday experiences that

deliver this, gaining insight or a sense of well-being.

Unwinders – For Unwinders, holidays are all about relaxation and release, focusing on themselves as an escape from their busy lives. They seek an unstructured holiday. Decisions are made when at the destination. This allows them to catch their breath, feel calm and peaceful and gain perspective.

Extract from State of Queensland, 2013, *Destination Success: The 20 Year-Plan for Queensland Tourism*

Destination Success – Six Themes

Build strong partnerships

- Industry and governments will work in partnership at all levels, unified in their approach to support the growth of tourism.
- The tourism industry will have strong leadership that works collaboratively across other industries, with communities and towards a common long-term vision.
- The community will be ambassadors for tourism, welcoming visitors and recognising the benefits that the industry brings to Queenslanders.

Preserve our nature and culture

- Natural assets will continue to be the heart of the Queensland experience—able to be enjoyed by visitors and locals alike, and preserved for future generations.
- Our unique, authentic character and cultural heritage will be preserved and enhanced, and will always be at the heart of the Queensland experience.

Deliver quality, great service and innovation

- We will deliver authentic, quality experiences with a local feel and high standard of service, showcasing the best of the Queensland spirit—friendly, welcoming and down to earth.
- Our industry will be led by career-oriented professionals who are passionate about tourism and their communities.

¹⁸ Further detail on individual segments is available on the TEQ [website](#)

- Our operators will be technologically smart, connected and efficient, doing business better and reaching consumers in new and innovative ways.

Target a balanced portfolio of markets

- Visitors from Australia and around the world will aspire to visit our destinations many times, exploring the diversity of our state.
- We will target a balanced portfolio of markets that match our competitive strengths and deliver the best results for our destinations.
- We will always look to the future, understanding and acting on consumer trends to appeal to traditional markets and grow new markets.

Offer iconic experiences

- We will focus on the consumer, and the experiences we offer will create lifelong memories.
- Our destinations will build on and leverage their strengths and heroes—iconic people, places and events—giving visitors many reasons to stay, explore and return.
- Our hero experiences and icons are our points of difference, and this is what we will showcase.

Grow investment and access

- Well-planned, timely public and private infrastructure will enable tourism growth and visitor access.

The ability of the industry to invest and innovate will be encouraged through the continued reduction of unnecessary red tape.

Tourism Opportunity Plans – Catalyst Projects

The Catalyst Projects outlined in the original South East Queensland (2009-19) and Outback, Gulf and Western Downs Tourism Opportunity Plans are still highly relevant to the development of Southern Queensland Country as a destination with high market appeal. While some progress has been made, the region remains committed to moving forward with the implementation of these projects.

- South East Queensland Country Food and Wine Experience

- Developing a 'Country Drive' Landscape
- Encouraging Unique, Boutique and Quality Accommodation
- Handmade in Country – Living Heritage
- Extension to the Brisbane Valley Rail Trail
- Bunya Mountains Activity Centre
- Thomas Jack Park Visitor Information and Cultural Precinct
- Picnic Point Parklands Future Use Plan
- Stanthorpe Tourism precincts and Pedestrian Linkages
- Morgan Park Master Plan and Site Development
- Roma Big Rig Expansion
- Nindigully Precinct Preservation
- Lake Coolmunda Master Plan

Understanding the Tourism System

Working together is a theme throughout this document. Understanding the inter-relationships is very important in maximising the gains that can be made from building effective partnerships.

1. **Tourism Australia** – is the Australian Government agency responsible for attracting international visitors to Australia and encouraging Australians to travel domestically, both for leisure and business events. Its purpose is to increase the economic benefits of tourism to Australia. Tourism Australia is active in around 30 key markets including Australia, promoting the unique attributes which will entice people to visit and targeting those people who its research indicates will spend more and travel most widely.
2. **Tourism and Events Queensland** – is the Queensland Government's lead marketing, experience development and major events agency, representing the state's tourism and events industries. Key functions of the corporation are to attract international and domestic travellers to travel to and within Queensland through the promotion and marketing of Queensland in target markets; and through tourism experience and destination development. TEQ works closely

with the state's 13 membership-based regional tourist organisations, including SQCT.

3. **Southern Queensland Country Tourism** – is the peak tourism industry body/regional tourism organisation for Southern Queensland Country, including the local government areas of Southern Downs, Toowoomba, South Burnett, Goondiwindi, Balonne, Maranoa and Western Downs. SQCT is responsible for driving destination marketing, industry advocacy and destination partnerships. SQCT is primarily a marketing organisation, focused on promoting Southern Queensland Country hero experiences to deliver the region's 2020 tourism vision, brand promise, and the 'themes' that underpin the vision and brand.
4. **Local tourism organisations** – are responsible for developing the local experience, marketing the local areas and providing information services to visitors once they are in-region. The impact of LTO activities are strengthened where there is an emphasis on partnership marketing with the RTO and leveraging of overall principles of an integrated tourism system.
5. **Regional Councils** – play a key role in enabling the growth and development of tourism through 'place planning', infrastructure development, management and operation of local government facilities, and the promotion of local attractions.
6. **Visitor Information Centres** – are the frontline of tourism in the region and often the first contact for the visitor when arriving in a destination. They play a vital role within the tourism system in the communication of local and regional information. They are the tourism ambassadors for the region. The majority of VICs are funded by and run by regional councils and rely heavily on the support of local volunteers.

Partner Acronyms

ATEC	Australian Tourism Export Council
BM	Brisbane Marketing
BWW	Brisbane West Wellcamp Airport
DAFF	Department of Agriculture, Fisheries and Forestry
DATSIMA	Department of Aboriginal and Torres Strait Islander and Multicultural Affairs
DETE	Department of Education, Training and Employment
DE	Department of Employment, Australian Government
DSDIP	Department of State Development, Infrastructure and Planning
DSITIA	Department of Science, Information Technology, Innovation and the Arts
DTSBE	Department of Tourism, Major Events, Small Business and the Commonwealth Games
DIRD	Department of Infrastructure and Regional Development
DTMR	Department of Transport and Main Roads
LTO	Local Tourism Organisation
LTA	Local Tourism Association
NPSR/QPWS	Department of National Parks, Recreation, Sport and Racing/Queensland Park and Wildlife Services
OQTA	Outback Queensland Tourism Association
QTIC	Queensland Tourism Industry Council
RFN	Regional Food Network
SQCT	Southern Queensland Country Tourism
TA	Tourism Australia
TRA	Tourism Research Australia
TEQ	Tourism and Events Queensland
TSBE	Toowoomba and Surat Basin Enterprise
VFR	Visiting Friends and Relatives
VIC	Visitor Information Centre

Appendix 2: Annual Growth Forecasts

	2013		
	Stretch Forecast	Actual	Difference
Domestic	\$553,187,108	\$669,316,267	\$116,129,159
International	\$134,640,807	\$64,965,145	-\$69,675,662
TOTAL	\$687,827,915	\$734,281,412	\$46,453,497

The current overnight expenditure within the region is ahead of the 'stretch forecast'. However, this position is entirely dependent on the strength of the domestic markets, with the international overnight expenditure trailing significantly behind the targeted growth rate.

Recognising that meeting targets will be largely dependent on the domestic markets, the following scenarios have been developed, with differing growth rates for the domestic segments – holiday, VFR and business. Regardless of scenario, the growth rates required are highly challenging.

	PER ANNUM GROWTH FORECASTS		
	Scenario 1	Scenario 2	Scenario 3
Holiday	2%	3%	4%
VFR	3%	3%	3%
Business	9%	8%	7%
Other	1%	2%	2%

	SPEND FORECASTS								
	Scenario 1			Scenario 2			Scenario 3		
	Spend 2020	Per Annum Growth	% Contribution to 2020 Target	Spend 2020	Per Annum Growth	% Contribution to 2020 Target	Spend 2020	Per Annum Growth	% contribution to 2020 target
Domestic	\$933,556,174	9.4%	90.6%	\$932,413,569	9.4%	90.5%	\$930,959,082	9.4%	90.4%
International	\$96,473,774	6.9%	9.4%	\$97,616,379	7.2%	9.5%	\$99,070,866	7.5%	9.6%
TOTAL	\$1,030,029,948	-	100%	\$1,030,029,948	-	100%	\$1,030,029,948	-	100%

Appendix 3: Discussion Paper

Southern Queensland Country

Destination Tourism Plan - Discussion Paper



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Why is Queensland Preparing Destination Tourism Plans?

Tourism is recognised as one of the four pillars of the Queensland economy and a significant contributor to employment and the future economic prosperity of the State. The Queensland Government, through the inaugural DestinationQ forum in 2012, acknowledged the fundamental role of the destinations in returning Queensland to its rightful place as Australia's pre-eminent tourism destination. Each destination has its own unique experiences, opportunities and challenges and therefore each needs to set its own clear direction. That is the role of a Destination Tourism Plan (DTP).

Acknowledgements

Images used throughout this document are courtesy of SQCT and Tourism and Events Queensland.

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Setting the Scene

Building on \$734m of direct visitor spending, overnight visitors to the Southern Queensland Country Region contribute \$1.25 billion of direct and indirect expenditure to the local economy and support 21, 907 jobs (FTEs).¹

Tourism and events already play an important role in the Region's economy; however its future growth and success requires a planned approach.

The Southern Queensland Country Destination Tourism Plan will provide the **definitive direction for tourism and events** in the Southern Queensland Country Region towards 2020, highlighting the resources required to create a sustainable and competitive tourism and events destination.

The difference is made in open and honest communication and matching the unique assets and people in the tourism and events network to the trends and opportunities and by prioritising our effort.

Objectives of the Destination Tourism Plan

- Address the **needs of the broader visitor economy** in the Region.
- **Complement Southern Queensland Country's other major corporate and tourism strategies**, including the Southern Downs, Toowoomba and Western Downs Regions Economic Development and Corporate Plans.
- Develop a **best practice destination tourism plan** to attract visitors to the Southern Queensland Country Region, distribute economic benefits to the destination and support a sustainable tourism industry.
- Outline the **value of tourism and events to the wider regional economy** in terms of expenditure, jobs and industries supported by tourism and events.
- **Build on the unique features** of Southern Queensland Country as a destination.
- Identify **unique tourism experience, product and event development opportunities and associated key infrastructure and stakeholder needs** required to meet the needs of consumers.
- Confirm a **clear strategy and direction** for Southern Queensland Country in the context of Queensland's 2020 growth ambitions.

¹ \$1.25 billion overnight visitor expenditure impact is derived from actual overnight expenditure (IVS/ NVS) plus estimated indirect visitor expenditure, plus generated taxation revenues. This figure relates solely to overnight visitor expenditure and excludes day visitor spending.

Where Tourism and Events Play a Role in Our Community

Tourism and events are part of the broader visitor economy which this DTP aims to grow. The visitor economy includes all leisure travel, and travel associated with business, events, visiting friends and relatives, and for the purpose of health and education.

Based on best estimates from the National and International Visitor Surveys, the visitor economy injects **\$734.3 million of overnight visitor expenditure** into Southern Queensland Country's economy. This in turn generates an overall expenditure impact of **\$1.25 billion** (direct and indirect expenditure) across sectors which include transport, accommodation and food services and retail trade.

In the Southern Queensland Country region, direct overnight expenditure supports an estimated 12,064 jobs (based on June 2013 IVS and NVS data, and Deloitte Access Economics estimates in the Tourism Satellite Accounts 2010/11) and for every \$60,863 of visitor spend in Queensland, one full time employee (FTE) is created or supported.

When support from indirect visitor expenditure is considered, total employment impact from overnight visitors is estimated to be direct and indirect **21,907 FTEs**.

An increase in visitation and subsequent visitor spend will have a direct positive impact on many sectors and their contribution to local and regional employment figures.

Performance in the Region's visitor economy has been very encouraging in recent years, with actual performance tracking above the projected 2020 growth targets (Figure 2). Achieving the target 2020 growth represents a challenging objective, but with continued focus, partners are confident of working towards this goal.

Figure 1 shows the overall impact of overnight visitor spending in Southern Queensland Country's economy.

Figure 1: Visitor Benefits to the Southern Queensland Country Economy

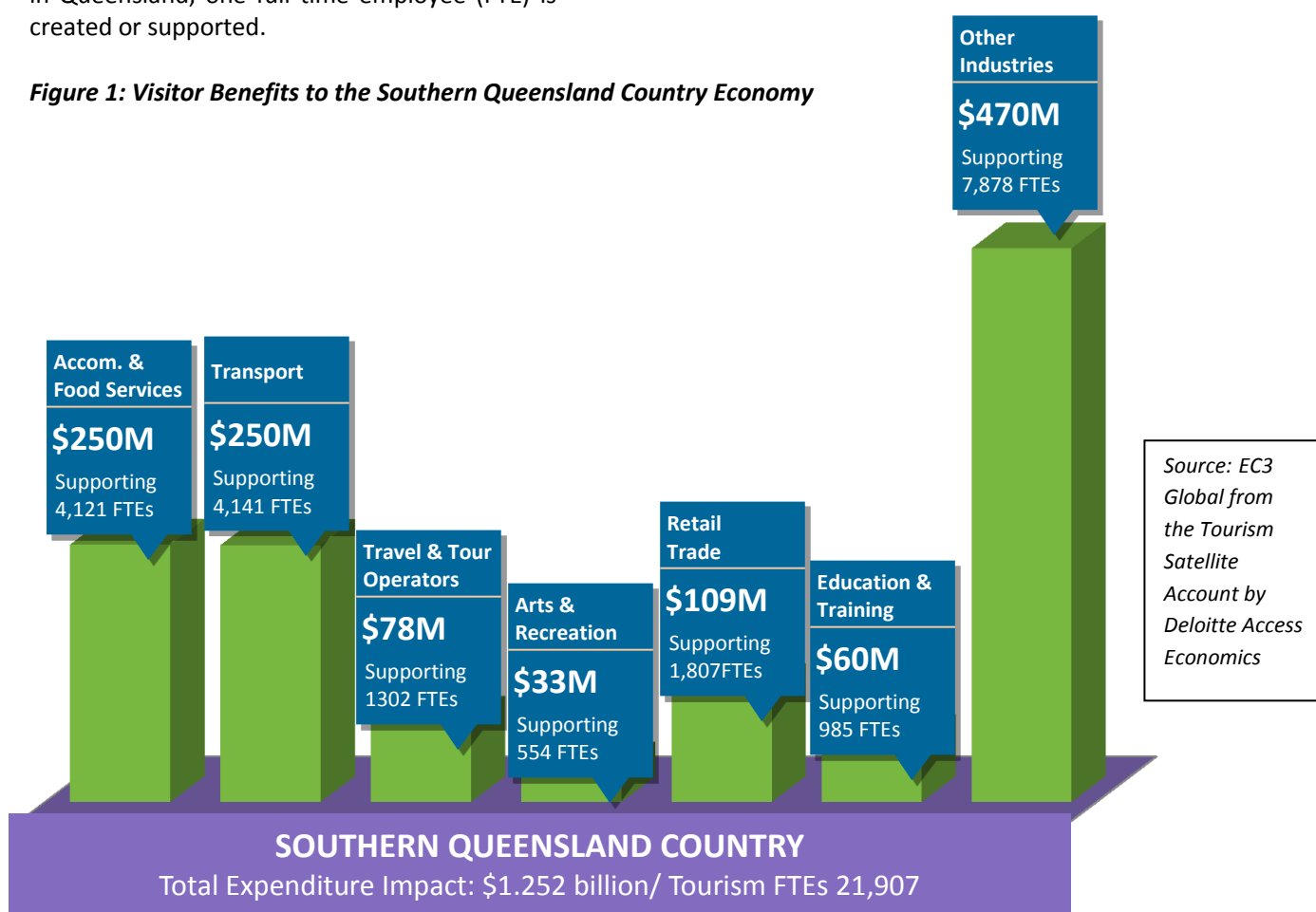
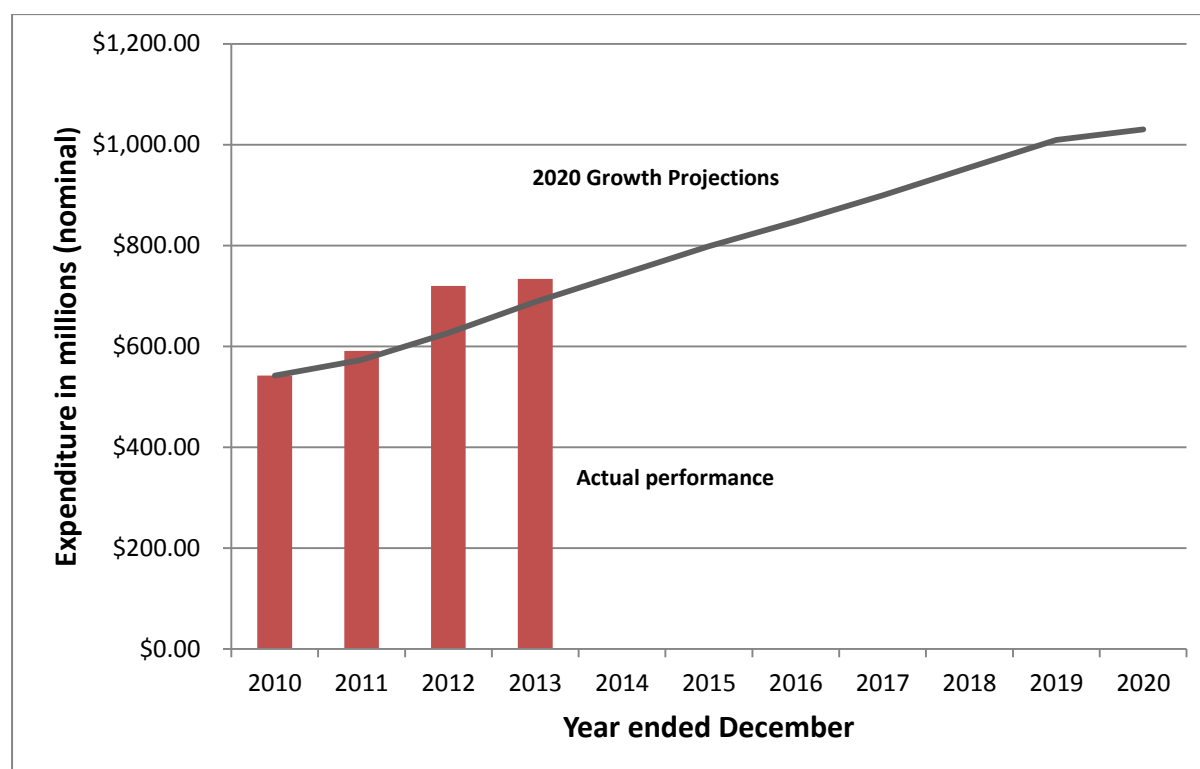


Figure 2: Southern Queensland Country Annual Overnight Visitor Expenditure - Actual Performance and 2020 Growth Targets



The role and economic contribution of tourism and events in the Southern Queensland Country Region has been well-recognised and incorporated into a wide number of corporate strategies² to direct planning, economic and social outcomes. As the Southern Queensland Country tourism region is still a relatively new entity, some of the pertinent strategic background is contained in documents which also cover neighbouring areas and tourism regions.

Regional and Local Strategic Context

Key strategic plans include:

SQCT Strategic Business Plan 2013-2020

Southern Queensland Country Tourism (SQCT) is the peak tourism industry body for Southern Queensland Country, including the local government areas of Southern Downs, Toowoomba, South Burnett, Goondiwindi, Balonne, Maranoa and Western Downs.

² Please note – this is not an exhaustive list of the Region’s corporate strategies, rather a highlight of the key documents that link to tourism.

SQCT is responsible for driving destination marketing, industry advocacy and destination partnerships. SQCT is primarily a marketing organisation, focused on promoting Southern Queensland Country ‘hero experiences’ to deliver the region’s 2020 tourism vision, brand promise, and the ‘themes’ that underpin the vision and brand.

The Business Plan notes the overall vision for the Region as;

“By 2020 Southern Queensland Country will be recognised as Queensland’s premier country getaway destination known for its distinct seasons and regional flavours; where you can breathe deep and enjoy a taste of life in the country.”

Key themes which underpin SQCT’s strategic direction and work with partners include;

- Understanding our tourism business
- Building and communicating a strong brand
- Creating and nurturing partnerships
- Advocating tourism

- Creating an enthusiastic and passionate team
- Running the business well.

SQCT strategic priorities for 2013/14 are;

- Undertaking campaign activity to increase awareness of Southern Queensland Country to increase leisure visitors
- Developing the marketing of specific events in Southern Queensland Country to increase the conversion to travel and length of stay
- Support and mentoring for Southern Queensland Country operators to enhance experience and service delivery, and industry capability
- Destination experience development to enhance the delivery of visitor experiences and related services, and to strengthen industry capacity.

The Corporate Plans for the Southern Downs (Corporate Plan 2030), South Burnett (Corporate Plan 2009-13), Toowoomba (Corporate Plan 2009-14), and Goondiwindi Regional Councils (Corporate Plan 2009-14) all identify tourism as a priority and each Council will work to promote the Southern Queensland Country region as a tourism destination.

The South Burnett Regional Council Community Plan 2032 sets out an action to investigate the possibilities of agri-tourism and promote the region for eco-experiences.

The Goondiwindi Regional Council Community Economic Plan 2012-2022 recognises that tourism is a key contributor to the local economy during times of drought and that it needs to capture more passing traffic as it does not have attractions to make it a specific destination.

The South East Queensland Country and Queensland Outback, Gulf and Western Downs Tourism Opportunity Plans 2009-19 were prepared prior to the formation of the Southern Queensland Country tourism region but many of the key catalyst and region-wide projects identified remain pertinent

South East Queensland Country TOP;

- South East Queensland Country Food and Wine Experience
- Developing a 'Country Drive' Landscape

- Encouraging Unique, Boutique and Quality Accommodation
- Handmade in Country – Living Heritage
- Extension to the Brisbane Valley Rail Trail
- Bunya Mountains Activity Centre
- Thomas Jack Park Visitor Information and Cultural Precinct
- Picnic Point Parklands Future Use Plan
- Stanthorpe Tourism precincts and Pedestrian Linkages
- Morgan Park Master Plan and Site Development.

Queensland Outback, Gulf and Western Downs

- Touring Market and Themed Routes
- Integrated Camping and Caravan Strategy
- Voluntourism and Guiding Tour Development Strategy
- Coordinated Events Strategy
- Paddock to Plate Strategy
- Outback Historical Sites Tourism Plan
- Outback Birding Opportunities
- National Park Ecotourism Opportunities
- Visitor Information and Weather Reporting Program
- Backpacker Market Potential
- Town Character Theming
- Energy Efficiency Program
- Accommodation Needs Analysis
- Industry Story-Telling Workshops.

Outback, Gulf and Western Downs Region Destination Tourism Strategy 2012-2016 provided the framework to guide tourism industry development in the Outback, Gulf and Western Downs region. While the formation of Southern Queensland Country has necessitated a new strategic direction unique to the Region, this destination tourism strategy continues to provide a useful strategic context for tourism development and priorities in Western Country and surrounding destinations which now make up key elements of Southern Queensland Country's rich tapestry of destinations.

The vision that "the area will be famous for its characters, culture, history and ancient landscapes where visitors feel the genuine Aussie embrace of a vast network of welcoming communities" remains relevant to parts of

Southern Queensland Country, its identified hero experiences and target markets.

The Darling Downs Regional Plan 2013 identifies tourism as one of the key drivers which will enable the implementation of the plan. The plan also mentions that the region's scenic, environmental and lifestyle characteristics offer a range of opportunities to diversify and strengthen its tourism sector including:

- Ecotourism;
- Cuisine based festivals and enterprises; and
- Expanding accommodation facilities.

Southern Downs Region Tourism Strategy 2012-2017 and Action Plan (June 2012) recognises the role which a vibrant tourism industry plays in the overall economy of Southern Downs. Building on a set of underlying guiding principles, the strategy identifies three areas as the focus of attention over the strategy period;

1. Building effective leadership through innovative collaboration
2. Developing compelling visitor experiences
3. Promoting the Southern Downs through an integrated approach that highlights the unique identities of local areas while creating a greater level of awareness for the Region.

South Burnett Regional Council is currently in the process of leading preparation of a **South Burnett Tourism Plan**, providing prioritisation and strategic direction for the industry in the region. The plan will build on the industry

feedback collated from a December 2013 industry forum.

Queensland Strategic Context

Key strategic plans include:

Queensland Drive Tourism Strategy 2013-2015 as part of the 20 Year Tourism Strategy aims to ensure a better understanding of linkages between tourism demand, infrastructure requirements and road user conflicts. Drive tourism is the lifeblood of the tourism industry in many regions. It is vital in facilitating regional dispersal and access to Queensland's many and varied visitor experiences. Driving is also the only or main way to get to many Queensland destinations including those located in the Southern Queensland Country region.

The 20 Year Tourism Strategy and the outcomes of DestinationQ provide key strategic goals for the sector. They emphasise the roles of investment facilitation and attraction, nature-based tourism, the drive market (including the Queensland Drive Tourism Strategy 2013-2015), and the important role of events (2020 Strategic Marketing Plan).

The Queensland Ecotourism Plan 2013-2020 provides a clear direction for facility investment in parks and for Queensland to regain its position as the number one ecotourism destination through world-leading interpretation and presentation.



About Southern Queensland Country

Destination Description

Southern Queensland Country is steeped in provincial heritage and abundant natural splendour. The area is renowned for its panoramic mountain vistas, spectacular natural attractions, boutique wineries, fertile land and warm country hospitality from B&Bs.

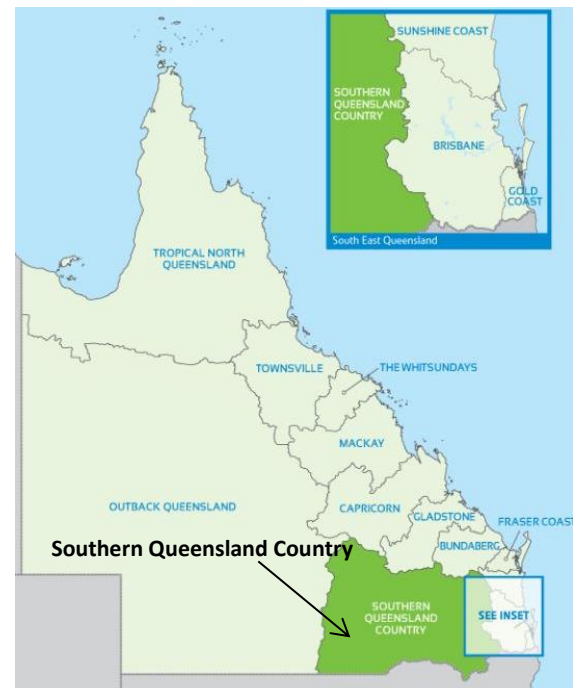
The Southern Queensland Country (SQC) region³ is within a 'comfortable' driving radius of Queensland's capital Brisbane and encompasses the region stretching from Stanthorpe in the south to Kingaroy in the north, and from Toowoomba as far west as Mitchell. Southern Queensland Country is somewhere to savour crisp clean country air, award-winning wines, the freshest local produce and time with some of the friendliest locals around. And because you can drive there in less than two hours from Brisbane, it's somewhere that's easy to sneak away for a weekend with friends or a short break with the family.

Southern Queensland Country is renowned for its four distinct seasons, and is a wonderful getaway to slow down and breathe the fresh, country air. Each season has its own style and charm from the colour and vitality of spring to being able to cosy up next to a fire in winter.

The Region offers a wide variety of visitor experiences and products including; Western Country's towns which provide perfect bases to explore and experience the heartland of rural Queensland life, the Granite Belt's nature experiences, and the history of Toowoomba. Southern Queensland Country is also an abundant and diverse agricultural region, with the quality of its food and drink produce held in high regard. It boasts the only Geographically Indicated (GI) wine regions in Queensland.

Southern Queensland Country Region combines this wealth of attributes and products to form the perfect holiday destination offering unlimited experiences to savour.

Map 1: Southern Queensland Country Location Map



Competitive Strengths

The main competitive strengths of Southern Queensland Country are:

- Home to **award winning** wines and artisan products
- **Pristine** national parks and spectacular natural attractions
- **Diversity of experiences** across the Region offering visitors an authentic holiday
- **Historical heritage** providing a snapshot into what country life was like
- Friendly **people & country lifestyle**,
- **Relaxed and peaceful** atmosphere
- **Four distinct seasons** provide a diverse range of experiences.

³

<http://www.southernqueenslandcountry.com.au/>

Southern Queensland Country has made a commitment to the Queensland Government to help achieve the State's target of doubling overnight expenditure to \$30 billion by 2020 – **by 2020, the Southern Queensland Country Region will contribute \$1 billion in overnight visitor expenditure.**

Southern Queensland Country 'Hero Experiences' have been developed to deliver the region's 2020 tourism vision (see page 5), brand promise, and the 'themes' that underpin the vision and brand.

Core Brand Promise

Slow down, breathe deep and enjoy a taste of life in the country

Hero Experiences and Themes⁴

A tourism 'experience' is the emotional feeling or personal achievement a visitor derives from the purchase, participation or consumption of a tourism product – accommodation, attractions or tours. The 'tourism product' is what the customer buys; the 'tourism experience' is what they remember.

Four destination 'hero' experiences were developed in 2012 to deliver on Southern Queensland Country's 2016 tourism vision, brand promise and the 'themes' that underpin the destination's vision and brand.

Hero experiences are world class experiences that:

- Provide a destination with a real competitive advantage over other destinations
- Focus on what is truly unique or memorable or engaging about a destination, and
- Meet the needs of target markets.

The five themes and associated 'hero experiences' identified for the Southern Queensland Country Region are:



Natural Beauty

Lose the stress of city life as you enjoy leisurely drives through a stunning, ever changing landscape that takes you to places of quiet beauty

History and Heritage



Get a firsthand insight into what life in the country was like in the past to appreciate how far we've come

Four Seasons

Feel renewed when connect with the nature reinvents country, season by season



you way the



Authentic Country Life – like a local

Be welcomed by the locals and treated like a visiting friend, rather than a tourist. Strike up a conversation and make yourself at home... life as it ought to be.



Authentic Country Life – Regional Flavours

Gain new appreciation for delicious food, award winning wines and artisan products when you see where and how they were made and even connect with the people behind them.

The State-wide context for Southern Queensland Country's regional targets and priorities is provided by the State's strategic aim of doubling the value of tourism by 2020

⁴ Southern Queensland Country Region 'Hero Experiences' Fact Sheet, Tourism and Events Queensland (2012)

Consumer and Community Perceptions

Visitor Perceptions

Tourism and Events Queensland's Brand Equity Index (BEI) provides a means of measuring consumer perceptions of the State's visitor destinations. The BEI tool quantifies consumers' attitudes giving them a score out of ten (where 0 is low and 4 is considered high). For Queensland destinations, the majority (50%) of BEI scores are under 1.0, 35% of BEI scores are between 1.0 and 3.0, 15% are over 3.0.

2013 is Southern Queensland Country's inaugural brand health check following the launch of SQC branded campaign activity earlier in the year. The BEI benchmark for SQC in 2013 is 0.7. **This BEI score is higher than ever previously achieved by Toowoomba & Darling Downs, Southern Downs & Granite Belt, Western Downs and South Burnett on an individual basis.**

This positive score after the launch of the brand to consumers suggests that it has achieved initial traction and meaning with target audiences - indicating that SQC has more meaning to consumers than the brands previously used.

Amongst Queenslanders, awareness of the region is solid (73%) and more than half indicated that they would consider visiting the destination.

At 73%, awareness amongst Queenslanders for SQC is higher than what Toowoomba & Darling Downs, Southern Downs & Granite Belt, Western Downs and South Burnett achieved individually. In 2012 awareness of the individual regions ranged from 52% to 72%, and consideration from 31% to 48%.

The opportunity for SQCT is to increase the number of people that would consider taking a holiday in the region.

Study results suggest that Southern Queensland Country is best known for being a place where consumers can feel relaxed, reflect and recharge at their own pace, leave the cares of the world behind, have the freedom to be who they want to be and feel like one of the locals. Further

strengthening the association of these attributes with Southern Queensland can help strengthen the regions BEI.

Queenslanders tend to see Mackay, Townsville and Northern NSW similarly to Southern Queensland Country. Collectively they see the destinations as places where you can feel like one of the locals. These regions have similar BEI scores amongst Queenslanders: Northern NSW 1.2; Townsville 1.0; Southern Queensland Country 0.7 and Mackay 0.6.

Community Perceptions⁵

TEQ's social indicators benchmark provides a means of examining the social impacts of tourism on local communities. New 2013 results show positive perceptions and attitudes towards tourism from local residents

As a whole, local residents think tourism positively affects the community, higher than the Queensland average (59% rated the effect on the community +2 or +3 compared with 46% of all Queenslanders). Only one percent of respondents thought tourism impacted negatively (rated the impact -2 or -3) on the community.

Locals also feel more positive about the idea of tourists than the Queensland average. As a collective, they are also more likely to agree that they really like tourists (68% compared with QLD 57%). Three in five residents want more tourists to visit the region (57% compared with QLD 45%), and seven in 10 support development growth - again, much higher than the average (70% compared with QLD 59%).

Typically a higher than average number of Southern Queensland Country and particularly Southern Downs residents, agree with the positive impacts of tourism. These include:

- Festivals and events attract tourists and raise awareness (94% compared with QLD 87%)

⁵ 2013 Southern Queensland Country Social Indicators, TEQ

- Increased regional profile (91% compared with QLD 86%), and

- Increased local pride (81% compared with QLD 72%).

Table 1: Contact with Tourists, Feeling and Development

	QLD %	SQC %
Feelings About Tourists		
I like tourists	57	68
I tolerate tourists	31	26
I adjust my lifestyle to avoid tourists	10	4
I stay away from places tourists go	3	3
Contact With Tourists		
I never come into contact with tourists	22	18
I see tourists around but don't usually talk to them	51	51
I often interact with tourists as part of my job	10	14
I often meet tourists around town and talk to them	15	19
I have made friends with tourists during their stay but have not kept in contact	7	7
I have made friends with tourists and kept in contact after they have left	4	4

Source: 2013 Southern Queensland Country Social Indicators, TEQ

Competitor Analysis

The Southern Queensland Country region is a destination for visiting friends and relatives (38%), holiday (29%) and business (25%) that possesses **four distinct 'hero experiences'** –

- ✓ Natural beauty
- ✓ History and heritage
- ✓ Authentic country life
- ✓ Four seasons.

A comparison of Southern Queensland Country against other destinations has been made to identify the destination's key competitors and destinations which are similarly positioned in terms of 'experience' offerings (Table 2).

In the domestic arena, with 29% of visitors coming from Brisbane and 51% from regional

Queensland, the Southern Queensland Country Region's primary competitors are Queensland destinations close to their source markets, such as the Gold Coast, Sunshine Coast and Bundaberg Regions or those offering a similar experience such as Tasmania.

While the domestic market is key for Southern Queensland Country, it is also appropriate to consider overseas destinations which share similar experiences and attributes - there are many other international destinations that also provide a similar country lifestyle experience such as Marlborough on the South Island of New Zealand.

Table 2: Competitor Analysis against the Hero Experiences

Destination	Natural beauty	Country lifestyle	Regional Flavours	History and Heritage	Four Seasons
Southern Queensland Country	✓	✓	✓	✓	✓
Bundaberg	✓	✓	✓	✓	
Capricorn	✓	✓		✓	
Sunshine Coast	✓	✓	✓	✓	
Coffs Harbour (NSW)	✓				
Eden (NSW)	✓	✓			
Port Stephens (NSW)	✓			✓	
Moreton / Stradbroke Island	✓				
Whitsundays	✓		✓		
Kangaroo Island (SA)	✓	✓			
Cairns	✓			✓	
Fraser Coast	✓		✓	✓	
Marlborough (NZ)	✓		✓	✓	✓

Where Are We Now? – Visitation

Visitors

This past year (YE June 2013), Southern Queensland Country received approximately **1.83 million domestic overnight** and **4.016 million domestic day trip visitors**. This represents an average **2% yearly increase** in domestic overnights over the past five years. **VFR** is a particularly important market for Southern Queensland, accounting for 39% of all overnight visitors (largest proportion of visitors by purpose of visit).

In terms of international visitors, the Southern Queensland Country region saw **48,000 international visitors** this past year (YE June 2013), which was unchanged from 2008.

Visitor Nights

In the Year Ending June 2013, there were **5.8 million domestic overnight visitor nights** in Southern Queensland Country and **1.5 million international** visitor nights. These represent a **6% and 12% increase in nights** respectively from 2008.




Origin of Visitors

Domestic overnight visitors are **primarily intrastate** (80%), with the majority of these visitors from **regional Queensland** (51%). Interstate visitors are primarily from regional New South Wales. The majority of domestic **day trip** visitors originate from South East Queensland although the Region also attracts day visits from New South Wales.

Brisbane represents the Region's largest single source of day trip and domestic overnight visitors, reinforcing its position as Southern Queensland Country's key market.

The top sources of international visitors are **New Zealand, Asia (including China and Japan), the United Kingdom and the USA** (Table 3)

Table 3: Top International Markets to Southern Queensland Country

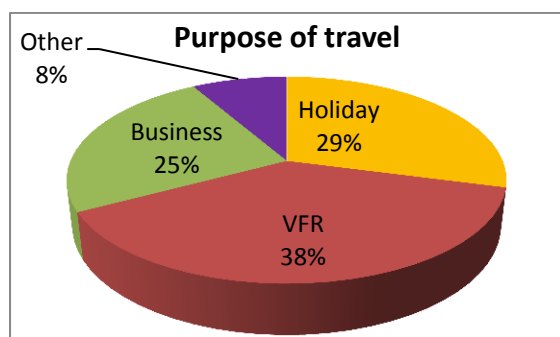
Country/Region of Residence	% of Int. Visitors to Southern Queensland Country
 New Zealand	23%
Asia	23%
 United Kingdom	13%
 USA (incl. Hawaii)	8%

It should be noted that Southern Queensland Country's share of overseas visitors to the State is relatively small, and is also heavily dependent on seasonal workers in the fruit picking industry.

Purpose of Visit

The purpose of domestic visits is divided across **visiting friends and relatives** (38%), **holiday** (29%) and **business** (25%).

Figure 3: Purpose of Visit – Overnight Domestic Visitors



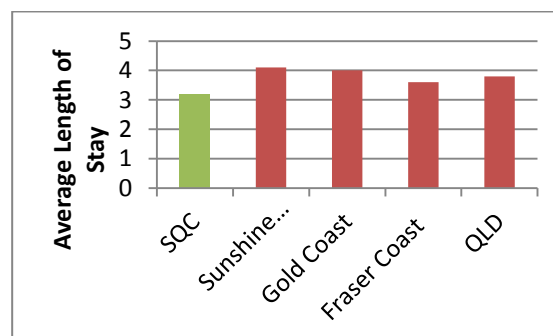
Expenditure

Visitor expenditure in Southern Queensland Country (up to June 2013) is dominated by the domestic market - \$669.3m (91%), with overseas expenditure accounting for \$65m (9%). When average yield per visitor is considered, domestic visitor yield is \$366 compared to \$1353 for overseas visitors. Both of these figures are **lower than the State averages** of \$627 and \$1916.

Average Length of Stay

The average length of stay (ALOS) for **domestic** overnight visitors to the Southern Queensland Country region is **3.2 days** (YE June 2013). This is slightly lower than the state average (3.8) and lower than other destinations with significant short break markets such as Gold Coast (4) and Sunshine Coast (4.1)

Figure 4: Domestic Average Length of Stay



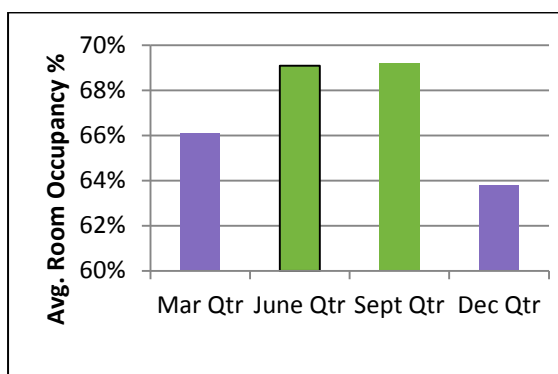
International ALOS for Southern Queensland Country is **31.1 days** and this has increased by 11% since 2008. This is higher than the State average of 22.2 days (TRA, 2013). The long average length of stay is heavily influenced by the Region's fruit picking workforce, a significant proportion of which are overseas visitors.

Seasonality

Accommodation data from the Australian Bureau of Statistics (ABS) for Southern Queensland Country indicates a mild seasonality pattern in room nights occupied. **September and June quarters show the highest occupation levels**, indicating a possible preference for travel during the cooler months. This data shows an indicative pattern of seasonality in terms of accommodation occupation levels, but it should be treated as indicative only - data limitations (study covers Darling Downs area only and is limited to establishments offering 15+ rooms) mean that it is not representative of performance across the whole of Southern Queensland Country.

Figure 5 shows the average room occupancy for 2013 (YE June).

Figure 5: Average Room Occupancy 2013 (YE June)



Activities

Visiting friends and relatives is the most popular activity for domestic overnight visitors to Southern Queensland Country. This is followed by **eating out at restaurants and sightseeing**. For international visitors the most popular activity was **eating out at restaurants** followed by **shopping for pleasure** and **sightseeing**.

Figures 6 and 7 highlight the top twelve activities for each market.

Figure 6: Top Twelve International Activities (YE June 2013, International Visitor Survey)

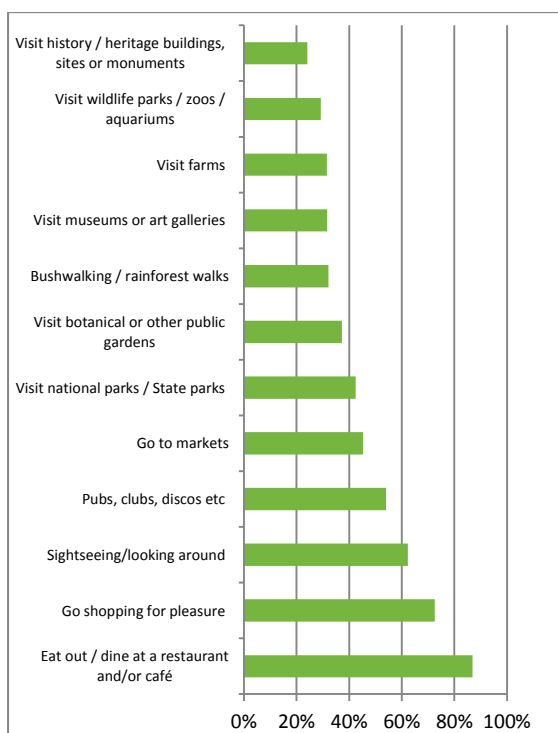
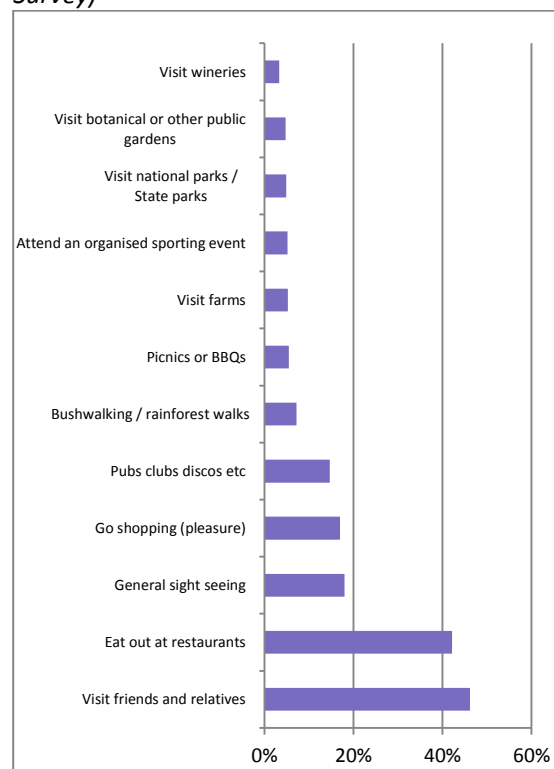


Figure 7: Top Twelve Domestic Overnight Activities (YE June 2013, Domestic Visitor Survey)



Where Are We Now? – Market Segments

International

Tourism Australia (TA) has defined its international target market as the **'Experience Seeker'** who are globe trotters looking for authentic interactions, brag-able locations to get off the beaten track and to immerse themselves in local culture. Experience Seekers are Australia's highest yielding international market and are **more likely to increase their length of stay and average spend** in comparison to others.

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

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

Internationally the Southern Queensland Country Region offers products that deliver to three of the seven experience themes.

Domestic

Tourism and Events Queensland's (TEQ) extensive research into the domestic market has defined six market segments based on visitor needs and wants giving valuable insight into consumers' emotional connection to what they expect from a holiday.

These market segments are seeking experiences that Queensland can offer under the following experience themes:

1. Natural Encounters
2. Queensland Lifestyle
3. Islands and Beaches
4. Outback

The Southern Queensland Country Region offers experiences that deliver on three of the primary Queensland experience themes – Natural Encounters, Queensland Lifestyle and Outback.

Connectors and Social Fun-seekers are Queensland's two primary target markets and when combined, they represent 57% of the Australian population.

SOUTHERN QUEENSLAND COUNTRY TARGET MARKETS

Tier One

- Connectors in Regional Queensland and Brisbane (250km radius of the Southern Queensland Country Region)
- Social Fun-seekers in Brisbane and Regional Queensland

Tier Two

- Social Fun-seekers in Sydney and Melbourne
- UK, North America, Europe and Scandinavia
- Connectors in Sydney and Melbourne

Tier Three

- Korea, Malaysia and New Zealand

New and Developing

- China, Taiwan and Hong Kong

Connectors – Connectors see holidays a chance to connect with people they care most about. They will often subordinate their own preferences in terms of activities to ensure everyone has a good time.

Social Fun-seekers – For this market, the essence of a holiday is having a fun time. While they do a lot of different activities, it is sharing the experience with friends and other holiday makers that make the difference.

Where Will We Be in 2020? – The Way Forward

As you can see in the diagram below, Southern Queensland Country is at a critical junction in its tourism future.

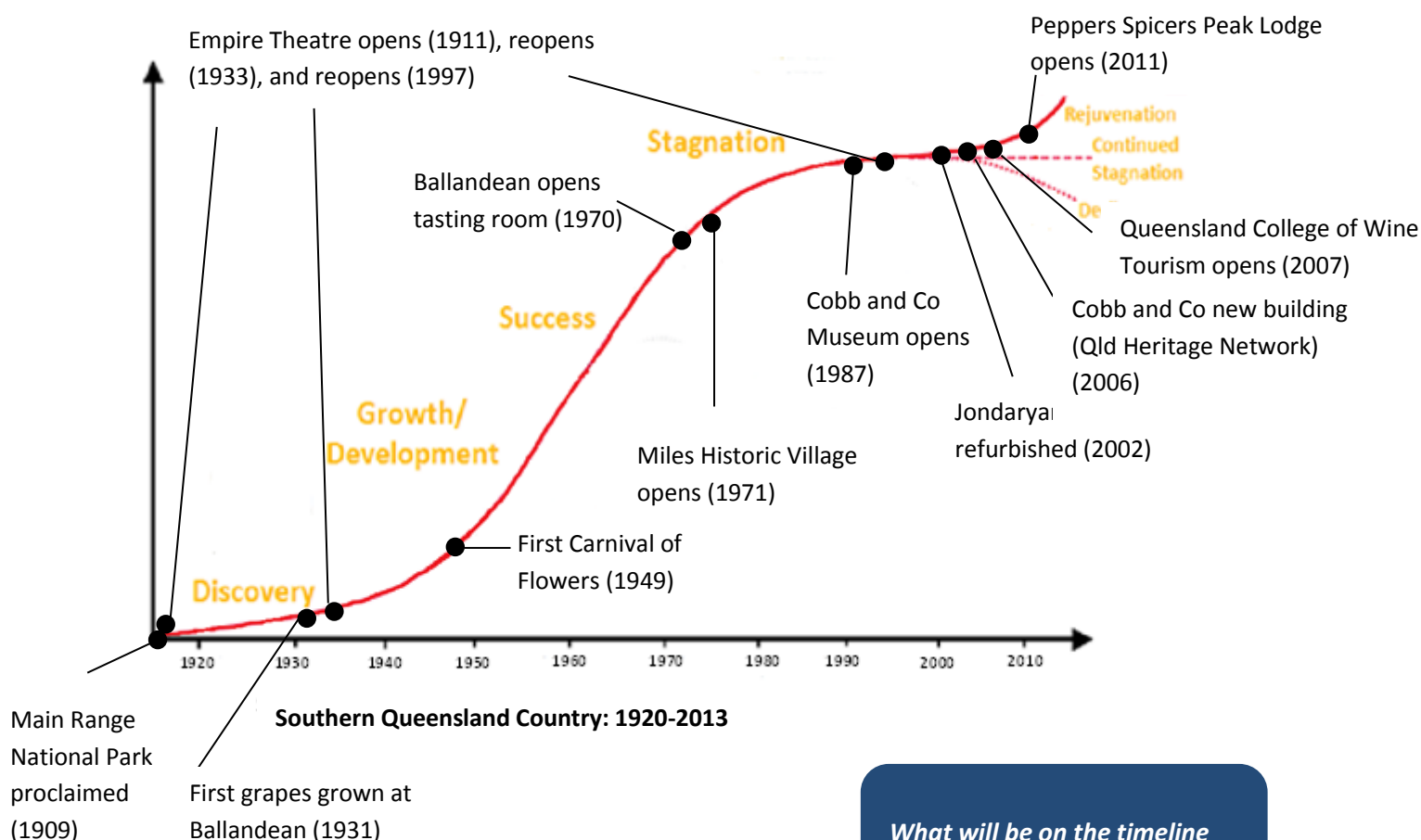
In order to help achieve Southern Queensland Country's 2020 target of \$1 billion in overnight visitor expenditure, the Southern Queensland Country region needs to:

- **Be Compelling**
Grow visitation, spend and length of stay
- **Be Competitive**
Stand out as a destination
- **Be Sustainable**
Lift the quality of experiences

"By 2020 Southern Queensland Country will be recognised as Queensland's premier country getaway destination known for its distinct seasons and regional flavours; where you can breathe deep and enjoy a taste of life in the country."

What do you see as the biggest challenges and opportunities towards achieving the vision?

Figure 8: Tourism's Past, Present and Future in Southern Queensland Country



What will be on the timeline for 2013-2020?

Where Will We Be in 2020? – The Way Forward cont.

Destination 2020 Target

While the industry continues to grow in absolute terms, its share of the Queensland economy has been in decline. The mining boom has meant that the tourism industry is growing more slowly than the overall state economy, and has presented challenges for the sector by attracting workers away from tourism to higher paying roles in mining and related sectors. Growth in visitor numbers and nights in Queensland has fluctuated over the past decade as a range of factors such as the global financial crisis and European debt crisis have constrained growth in a number of traditional source markets. However, growth in international visitor nights for the state as a whole has continued, owing to the emergence of new source markets, in particular the growth of the Chinese market. Domestic visitor performance has been much weaker, with total domestic visitor nights in 2010 lower than those seen in 2000.

Achievement of industry potential⁶ (Deloitte Access Economics 2020 report) would require Queensland to attract international visitor nights by 24% above the Tourism Forecasting Committee (TFC) forecast.⁷ This would require a combination of growth in domestic tourism, retention of visitation from core current overseas markets, capturing new emerging markets such as India, and encouraging existing visitors to extend their stay. For **Southern Queensland Country** that means **lifting the \$734 million spend in 2013 to \$1 billion by 2020**.

Table 4: Southern Queensland Country –2020 Target Market Share Estimates

Market Segments	Current Share of Total Visitors	Forecast Share of Total Visitors in 2020	Additional Visitors	Additional Expenditure (estimated) *	% Contribution to 2020 Target	\$ Contribution to 2020 Target
Intrastate (QLD)	78.3%	78.0%	287,626	67,991,224	53%	\$550,010,735
Interstate	19.1%	19.0%	70,196	30,959,158	24%	\$249,908,698
TOTAL DOMESTIC	97.4%	97.1%	357,821	98,950,382	78%	\$799,919,433
New Zealand	0.6%	0.7%	3,681	10,324,974	5%	\$52,733,660
United Kingdom	0.3%	0.4%	2,594	7,277,312	3%	\$28,763,814
Germany	0.2%	0.2%	758	2,126,732	1%	\$14,381,907
USA	0.2%	0.2%	1,218	3,415,867	2%	\$19,175,876
France	0.1%	0.1%	319	895,502	0%	\$4,793,969
Remaining International	1.2%	1.4%	9,069	25,438,891	11%	\$110,261,288
TOTAL INTERNATIONAL	2.6%	2.9%	17,906	50,226,204	22%	\$230,110,514
TOTAL VISITORS	100.0%	100.0%	375,727	\$149,176,586	100%	\$1,030,029,948

*Spend per visitor estimated from Darling Downs average spend

Expenditure estimates (2013) put total current spend at \$734 million, and the 2020 target is \$1 billion.

⁶ Industry potential as defined in the Deloitte Access Economics report is based on the premise that rather than following forecast trends, growth in visitation can be accelerated. Achievement of the industry potential would require Queensland to attract international visitor nights above the TFC forecast growth, and via extending the stays of those tourists already visiting the State.

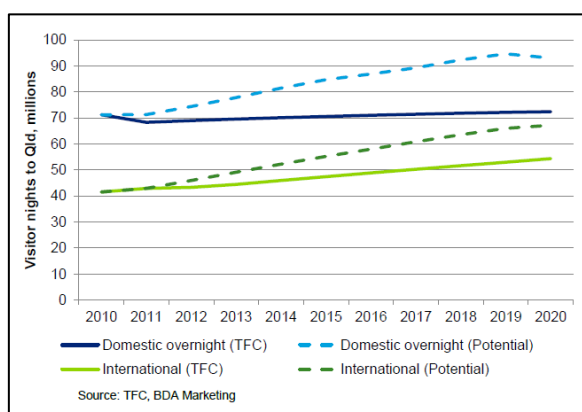
⁷ Tourism Research Australia's TFC forecasts represent the most likely outcomes given past trends, current information and the impact of policy and industry changes.

Growth Scenarios: Key Issues

Despite the sector's volatile performance in recent years, the forecasts show potential for continued growth. Performance in the Region's visitor economy has been very encouraging in recent years, with actual performance tracking above the projected 2020 growth targets (Figure 2). Achieving the target 2020 growth represents a challenging objective, but with continued focus, partners are confident of working towards this goal.

- International visitor nights are expected to steadily increase under both the TFC and 2020 forecasts (figure 9). The TFC forecast estimates an increase of about 50% by 2020, while the industry potential targets growth doubling over the next ten years.

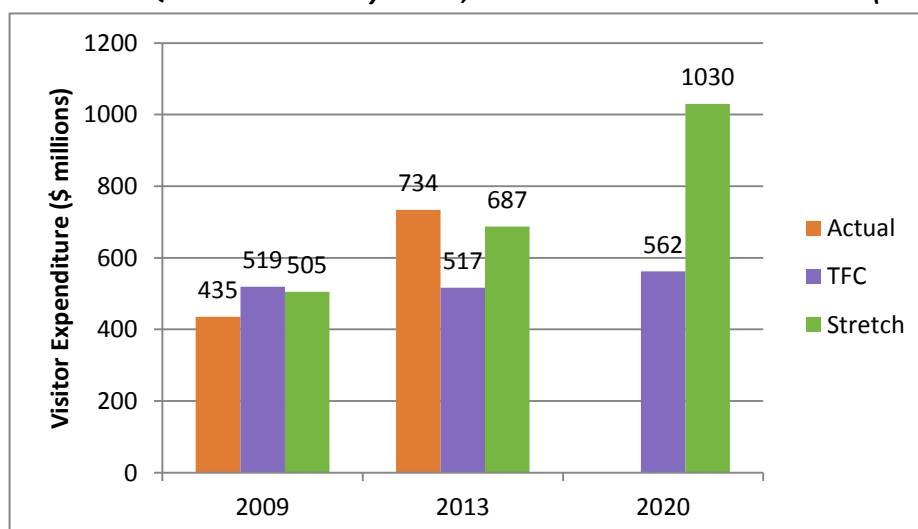
Figure 9: 2020 Outlook for Queensland - TFC and Industry Potential Forecasts



- International tourist expenditure in the Southern Queensland Country is forecast to show **strong growth rates over the next years to 2020**. The TFC forecast predicts an 81% increase in total international visitor expenditure, while the industry potential estimates nominal growth of 126%.
- Expectations of future domestic overnight tourism differ more significantly between the TFC forecasts and 2020 targets. The growth predicted by the TFC forecast is quite conservative, with only about 2% increase in domestic visitor nights, whereas the industry potential expects a break in the trend of poor performance seen over the past decade, with an increase of about 35% in domestic visitor nights by 2020. Figure 10 below show the gap between the baseline Tourism Forecasting Committee (TFC) forecasts, where visits are expected to continue to grow at a steady pace and the 2020 industry potential targets.

Market figures have been identified based on the Deloitte Access Economics forecasts for Queensland and the Southern Queensland Country, and are based on the assumption that Southern Queensland Country markets will grow proportionately to State market forecasts based on the Region's current market share.

Figure 10: Southern Queensland Country Actual, TFC and Stretch Growth Forecasts (2009 -2020)



Sources:
IVS/DVS, TRA
TFC Forecasts &
2020 Targets
Deloitte Access
Economics

Where Will We Be in 2020? – Tourism Megatrends

The Commonwealth Scientific and Industrial Research Organisation (CSIRO) and the Queensland Government recently identified seven megatrends that are likely to shape the Queensland Tourism sector to 2033. The seven megatrends and just some of the implications for the Southern Queensland Country Region are:

1. The Orient Express

The world economy is shifting from west to east and north to south. This is creating new markets and new sources of competition.

Implications for Southern Queensland Country

Overseas visitors as a whole currently make up a small proportion of Southern Queensland Country's overall visitor market. Although Asian visitors account for 23% of the total overseas market at present, it is unrealistic to expect Asian markets to be the key drivers of leisure tourism growth in the Region. However it is important that the Region is positioned to capture its share of custom where opportunities are available. In this sense, implications relate to all international markets including Asia in terms of;

- The need to build understanding and awareness of market needs,
- Examining opportunities to link with other South East Queensland destinations (who attract Asian and other overseas markets in larger numbers) and opportunities for day trips/trip extensions, and
- More businesses being 'international-ready'.

2. A Natural Advantage

In a world where ecological habitats are disappearing the unique natural assets of Queensland will become a stronger drawcard.

Implications for Southern Queensland Country

Southern Queensland Country has exceptionally strong assets in terms of its national parks and World Heritage Listed areas. This provides opportunities to increase visitation, expenditure and employment in the Region. Southern Queensland Country needs to position and package its natural assets in order to stand out from the crowd.

3. Great Expectations

Tourists of the future will have expectations for authentic and personalised experiences often involving social interaction.

Implications for Southern Queensland Country

Building on the hero experience development program, Southern Queensland Country businesses need to respond to the challenge and deliver quality service and experiences.

4. Bolts from the Blue

Climate change and infectious disease outbreaks combined with safety concerns will have increased impact.

Implications for Southern Queensland Country

Businesses and tourism managers need to monitor opportunities and be ready to respond, with imaginative marketing, packaging and pricing offers.

Businesses and destination managers need to be 'disaster-ready' and have resilience plans in place.

5. Digital Whispers

People are changing the way they access and trust information in an online world.

Implications for Southern Queensland Country

A fundamental challenge for businesses is access to digital infrastructure and services, providing the opportunity for SQC businesses to fully adopt and successfully apply new technologies.

Provided that Southern Queensland Country's businesses have appropriate access to the necessary infrastructure and services, the Region needs to embrace a multichannel approach to communication and promotion. This includes building business skills and capacity and delivering new virtual travel/experiences in the form of providing rich information.

6. On the Move

Humanity is increasingly mobile from trade, business, events, education and healthcare, with people travelling further and more frequently.

Implications for Southern Queensland Country

Maintaining air and road capacity is key to maximising the potential of this trend. In the case of Southern Queensland Country, the linkage to the international hub of Brisbane is crucial as well as the provision of a regional airport at Toowoomba and continuation of services to Roma.

Effective road and public transport access is key for the whole region, and especially crucial for Western Country destinations. Lack of access options is a potential barrier to future growth.

7. The Lucky Country

Australia and Queensland are increasingly wealthy, but expensive destinations, gifted with cultural and demographic diversity.

Implications for Southern Queensland Country

The need to compete on quality, experience and service will have implications for investment decisions by businesses and destination management partners.

Where Will We Be in 2020? – Growth Implications

Accommodation

Available data from the Australian Bureau of Statistics – Survey of Tourist Accommodation (2012) for Hotels, Motels and Serviced Apartments, data indicates that Southern Queensland Country has an accommodation occupancy rate that ranges from a low of 61.6% in December quarter to high of 69.2% in the June quarter. When TFC forecast growth rates are applied to 2020, occupancy rates are estimated to reach 63%.

Implications for Southern Queensland Country

- Achieving Southern Queensland Country's 2020 growth target will require approximately 376,000 additional visitors, approximately 95% of whom will be from domestic sources and 5% from overseas.

Access

The significant additional visitor volumes generated if the Region is successful in working towards its 2020 growth target will have implications for road and air access and infrastructure, as well as pedestrian flows in some locations.

Limited capacity to accommodate the anticipated traffic growth has the potential to be a major growth constraint in reaching 2020 targets.

Implications for Southern Queensland Country

- Achieving growth targets will result in additional visitor road traffic movements.

When peak flows are considered this may result in pressure points for infrastructure (roads and parking) in some areas. Additional planning may need to consider which routes are likely to experience the largest growth in visitor traffic.

- A relatively small proportion of visitors currently use public transport, however, increased overall numbers may also increase demand for services. Increased volume may assist in making the case for timetabling and route networks which meet the needs of the visitor economy.
- Capacity on air routes to regional airports is also likely to be pressurised. To fully maximise growth to Australia as a whole from Asian markets, new route development/ increased frequency of services from other domestic hubs may also need to be considered.
- Planning and lead-in/development time for increasing transport and related infrastructure is also an important consideration/constraint.

Attractions

The quality and range of experiences offered will be a critical factor in meeting visitor demand. If Southern Queensland Country is to maintain its edge, its experiences must be unique – providing the opportunity to create emotional attachment with visitors. In order to deliver the increased visitor volumes, a range of enhanced and/or new visitor experiences will be required in addition to fresh investment in existing attractions.

The projected increase in visitor numbers will be attracted to visit Southern Queensland Country for a reason – enticed by the Region’s landscapes, visitor appeal and range of attractions and experiences. Increased trade from VFR, leisure or business markets are all likely to generate additional demand.

Alongside visitor attractions, events will also have a key role to play. Development of a program of events over peak, shoulder and off seasons will complement physical attractors and facilities, providing new experiences and reasons to visit.

If visitor attractions do not meet with the increasing and varied market expectations, it is unlikely that sustained growth towards the 2020 targets will be met.

Implications for Southern Queensland Country

- Investment in existing key visitor attractions, potentially in terms of larger capacity, and in terms of product/services to meet identified demand.
- Targeted new investment in visitor attractions where long term feasibility is proven – review the applicability of the catalyst and long term opportunities identified in the tourism opportunity plan as a defined starting point.
- Events will play a leading role in generating additional visitor numbers and expenditure – growth from extending value from existing events, and growth from targeted attraction/development of new events. SQC’s new events strategy will provide a strategic basis for investment and seeking growth.
- With increased international visitor numbers, the importance of the Region’s visitor attractions being international-ready is critical.
- Need for continued proactive promotion of development opportunities to unlock investment.

Other Infrastructure

While core tourism infrastructure in the hospitality and visitor attraction sectors is of key significance, visitors do not use these facilities in isolation. A range of other infrastructure and services support and make up the overall visitor experience. This can range from signage and

public conveniences to town planning and public realm, conservation, and upkeep of landscapes, heritage and streetscapes. Public sector partners and community groups play a key role in much of this support infrastructure.

The weakest link in the overall experience provided is critical in influencing visitor satisfaction levels, and in generating the all-important positive word of mouth recommendations and repeat visits.

Implications for Southern Queensland Country

- A co-ordinated ‘whole of Southern Queensland Country’ approach to destination planning and management is required in order to deliver a compelling set of experiences which entice new visitors and encourage repeat customers. A first step is engaging/ re-engaging partners and raising awareness of the projected tourism growth and its potential implications.
- The nature of tourism activity is that towns and cities act as service centres for visitors as well as residents – where appropriate, precinct and town centre planning should factor in visitor demand alongside other key inputs.

Destination Workforce

Research by Deloitte Access Economics indicates that the Region’s workforce is under pressure from other sectors and will experience a short-fall if the 2020 stretch targets are met.

Tourism is a people industry, and particularly in a relatively high cost destination such as Australia, is heavily reliant on providing exceptional levels of service as a differentiator, and as a contributor to offering what are perceived as good value for money experiences.

Workforce development will be key determinant in helping Southern Queensland Country Region stand out from the crowd and achieve its 2020 ambitions.

Implications for Southern Queensland Country

- The number of persons required in the labour force to meet visitor forecasts for the Southern Queensland Country would require a compound annual growth rate of -0.4% under TFC, while this grows to 1.2% under stretch targets (Deloitte Access Economics).

- Given the relatively small labour force, both scenarios are likely to result in significant labour gaps (skilled and unskilled labour)
- Staff skills as part of workforce development will need to be addressed – both from the perspective of businesses being international-ready, and meeting/understanding the ever evolving nature of customer expectations.
 - From a longer term workforce development perspective, promoting and developing the tourism sector as an attractive career option for new entrants to the workforce also is worthy of consideration. Without this, skills and workforce are likely to be recurring issues for the sector.

Community

As an industry, tourism is unique in that the product is largely consumed locally and on-site by non-locals who are not rate payers or part of those electorates. Community benefit is in large part, derived from visitor spending supporting employment and services which are also utilised by local communities and residents.

At its extremes, large volume tourism activity if not managed can alienate communities and put pressure on local infrastructure and services.

Communities play a key role in delivering long term and sustainable economic growth - without their support, visitors often do not benefit from the genuine welcome that communities provides, and the experience loses its authentic feel. For communities to be engaged and play a part in the industry it is important that the benefits of tourism spending and activity are fully understood.

Implications for Southern Queensland Country

- Tourism growth will at least in part be focused on certain locations and hotspots. Communities will need to be engaged in those areas as key delivery partners and stakeholders.
- VFR will continue to be an important growth market – this is most effectively influenced by working at community level, building awareness of facilities and activities.
- A friendly welcome is always an important part of the tourism experience. Communities will be stakeholders in delivering this welcome.

How will the Region capture its 'Other International' markets (primarily Asia-based) as these play a significant role in achieving the overall 2020 growth aspirations for Queensland as a whole?

What strategies are required to build and maintain traditional overseas markets - UK, North America, Europe & New Zealand? How can the appeal of the destination be extended to overseas leisure visitors?

What action is necessary to grow domestic overnight and day visitor markets to meet the significant levels of growth forecast?



Next Steps

This Discussion Paper has been designed to guide the Destination Tourism Plan vision in which will discuss:

- 2020 growth targets,
- Direction for future development and marketing in the Region; and
- Priority strategies and actions.

Consultation Workshops will be held:

- Monday, 10 February, 3pm-6pm – South Burnett
- Tuesday, 11 February, 10am-1pm – Chinchilla
- Wednesday, 12 February, 9am-12pm – Warwick
- Thursday, 13 February, 9am-12pm – Goondiwindi
- Tuesday, 18 February, 9am-12pm – Toowoomba

For further details please contact Mary-Clare Power on 07463 21918

We hope to see you there!