



**TOURISM
TROPICAL NORTH
QUEENSLAND**
Where rainforest meets the reef

Tropical North Queensland Destination Tourism Plan

2021

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Executive summary

Tourism Tropical North Queensland (TTNQ) is the Regional Tourism Organisation responsible for marketing Tropical North Queensland to Australia and the world. The destination is known as Cairns & Great Barrier Reef in the international marketplace.

The Tropical North Queensland Destination Tourism Plan has been produced to provide prospective investors with an understanding of tourism in our region and its potential to grow. Tourism is a \$3.2 billion export business in Tropical North Queensland that employs one in seven people.

The destination's unique value proposition is having two World Heritage areas side by side. The Great Barrier Reef is alongside the world's oldest rainforest and both are less than a day's drive from the Australian outback. The oldest living culture on earth calls these diverse landscapes home.

As a not-for-profit member-based Regional Tourism Organisation, Tourism Tropical North Queensland is funded by members, local and state governments.

Cairns Regional Council is our major funding partner providing \$2.4 million which accounts for 45% of TTNQ's revenue for 2019/20. It is the only council that directly contributes to marketing the destination and does this in recognition of the benefits that job growth and visitor expenditure bring to the Cairns regional economy. Tropical North Queensland has 25 local government areas:

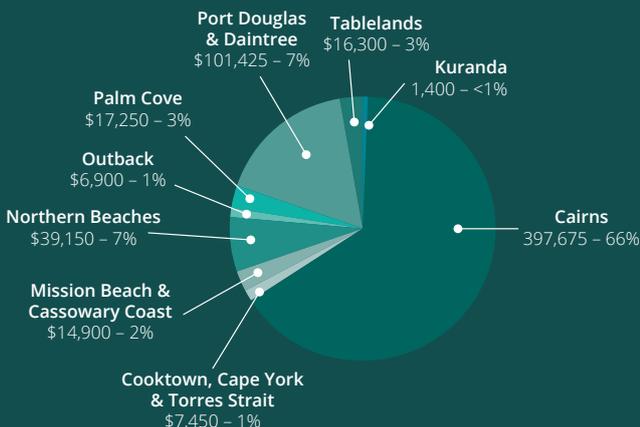
- Aurukun Shire Council
- Burke Shire Council
- Cairns Regional Council
- Carpentaria Shire Council
- Cassowary Coast Regional Council
- Cook Shire Council
- Croydon Shire Council
- Doomadgee Aboriginal Shire Council
- Douglas Shire Council
- Etheridge Shire Council
- Hope Vale Aboriginal Shire Council
- Kowanyama Aboriginal Shire Council
- Lockhart River Aboriginal Shire Council
- Mapoon Aboriginal Shire Council
- Mareeba Shire Council
- Mornington Shire Council
- Napranum Aboriginal Shire Council
- Northern Peninsula Area Regional Council
- Pormpuraaw Aboriginal Shire Council
- Tablelands Regional Council
- Torres Shire Council
- Torres Strait Island Regional Council
- Wujal Wujal Aboriginal Shire Council
- Yarrabah Aboriginal Shire Council
- Weipa Town Authority

Tourism and Events Queensland (TEQ) provides 17% of TTNQ's funding or \$904,000 for 2019/20. Industry co-operative funding accounts for 16.5% of the budget at \$871,500. Membership provides 11.5% of funding or \$607,000, TEQ provides 7.5% or \$400,000 to fund our business events bureau and Cairns Airport gives \$130,000 or 2.5% of our funding.

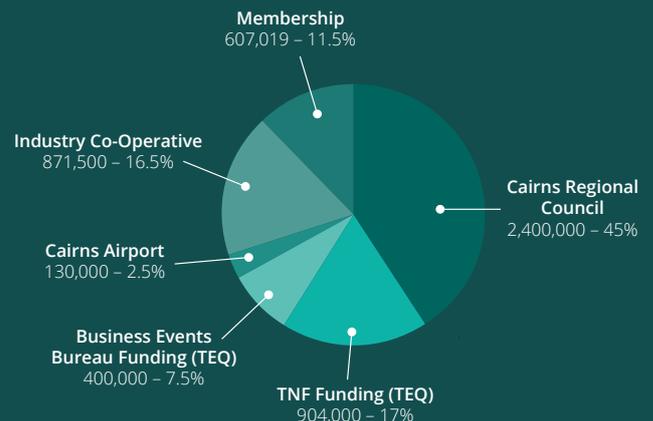
More than half of TTNQ's members are in the Cairns region with 66% (\$397,675) of member revenue coming from Cairns, 7% (\$39,150) from the Northern Beaches and 3% (\$17,250) from Palm Cove.

Port Douglas and Daintree members contribute 17% (\$101,425), the Tablelands contributes 3% (\$16,300) with an additional \$1,400 from Kuranda, the Cassowary Coast 2% (\$14,900), Cooktown, Cape York and the Torres Strait 1% (\$7,450), and the Outback 1% (\$6,900).

Membership revenue by region



2019/20 budgeted revenue by funding source



About Tourism Tropical North Queensland

TTNQ markets the destination as one of the world's most inspiring nature-based destinations. We do this by promoting the region as the gateway to hundreds of unique tropical experiences set in World Heritage landscapes.

Our organisation evolved from a grassroots community and business movement originally known as the Far North Queensland Promotion Bureau, which was established in 1978 to focus on destination marketing.

TTNQ's purpose is to drive visitor revenue and long-term benefits for the region by leading the destination's tourism marketing, positioning and brand story – and by being a unifying and coordinating voice for the industry.

As a not-for-profit, member-based Regional Tourism Organisation, we are the voice of Tropical North Queensland's tourism industry, and we work to increase visitor arrivals and expenditure for the benefit of the whole region.

Destination marketing

TTNQ's role is to inspire people to visit Tropical North Queensland through innovative and effective marketing of the destination. Digital marketing across owned, bought and earned channels is the key to being noticed in the fast-paced world of travel.

We provide opportunities for members of TTNQ to market their business as part of the destination. These include attending trade and consumer shows as a destination, advertising opportunities and campaigns, trade educational activities and in-market training, media familiarisations, e-newsletters with business opportunities, and marketing forums and workshops.

TTNQ focuses on building the capabilities of tourism businesses to ensure they are more competitive, adaptive and resilient so visitors can enjoy a consistently high standard of experience.

The organisation offers advice where other opportunities may be increased to ensure our region is offering the very best experiences across Tropical North Queensland.

Experience development

Experience development is focused on supporting tourism operators to deliver more engaging and memorable visitor experiences by better understanding the needs and preferences of the market and contemporary experience development practices. This may include resources and programmes addressing such issues as customer service, storytelling, customer journey mapping, online marketing and social media engagement

Product development

Product development is focused on the identification of new tourism experiences either as a new product or the enhancement of an existing product. This is done in response to consumer needs and trends and to leverage identified Tropical North Queensland Destination Hero Experience opportunities.

We support the initiatives that local governments put forward for infrastructure grant requests along with industry innovation.

Business development

We connect the dots to other organisations that can assist with business development. These include the Queensland Tourism Industry Council and the Australian Small Business Advisory Services program targeting generic development opportunities aimed at improving business viability and performance. The development and implementation of business plans, marketing plans and sustainable business practices are among the development opportunities offered.

Industry development

Industry development looks at tourism industry-specific development programmes aimed at supporting tourism businesses to enhance the overall efficiency, effectiveness and performance of their operations. This may include programs dealing with issues such as market readiness, trade engagement, yield management and channel management.

Destination overview

The TTNQ region has geographical coverage of 20% (340,645 km²) of the State's total area. This includes 25 local government councils with our major funding partner being Cairns Regional Council. Our destination stretches from Cardwell in the south to the Torres Strait in the north and west to the Northern Territory border.

Tropical North Queensland is known as one of the world's most inspiring nature-based destinations. It is the gateway to hundreds of accessible experiences set on the stage of the Great Barrier Reef, Earth's oldest rainforest and the outback. Inhabited by an ancient culture, Tropical North Queensland is shared by passionate locals.

The region has seven precincts:

- Cairns, Northern Beaches and Palm Cove
- Kuranda and the Atherton Tablelands
- Port Douglas and the Daintree
- Cassowary Coast
- Cooktown and Cape York
- Gulf Savannah and Outback
- Torres Strait Islands

There are four Local Tourism Organisations (LTOs) in Tropical North Queensland:

- Tourism Port Douglas & Daintree
- Tropical Tablelands Tourism
- Tropical Coast Tourism
- Savannah Way Limited

TTNQ provides an Ambassador of Tourism membership on a complimentary basis to all LTO and Local Tourism Association (LTA) members wanting more connection to the the RTO, including opportunities to participate in tourism cluster groups and co-op campaign initiatives.

The LTOs target grassroots industry development, in-region trade, media support and collaborative marketing investment. On behalf of their members, the LTOs liaise with their Regional Tourism Organisation and state bodies. TTNQ shares a Memorandum of Understanding with each of the LTOs in Tropical North Queensland. One of the key roles is for the LTO to act as a conduit to the 25 LGAs within the TNQ region. Quarterly meetings are conducted to exchange feedback and provide updates from LGAs to TTNQ. TTNQ also works in partnership with Tourism Australia, Tourism and Events Queensland, Cairns Regional Council, Cairns Airport and Torres Strait Regional Authority (TSRA), in addition to our airline and industry partners.



Hero experiences

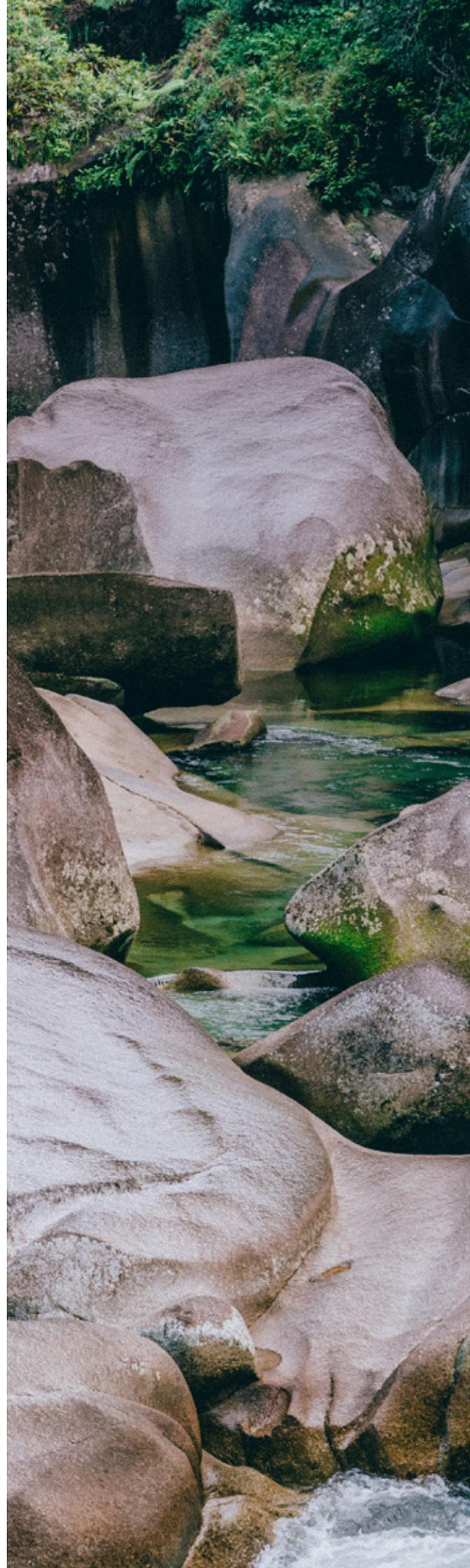
TTNQ works with our partners to deliver world-class, innovative destination marketing to position Tropical North Queensland as one of the world's most inspiring nature-based destinations.

The three pillars of our destination are:



Tropical North Queensland is made up of 'hero' experiences or stories:

- The story of the reef is one of understanding and conservation – one of the most important stories of our time
- The story of the rainforest is one of hikes, waterfall chasing, wonder and adventure – set amongst a living story that is 80-million years older than the Amazon
- The story of Indigenous culture is one of a deep connection to the land and its people
- The story of tropical lifestyle is one of relaxed local culture, authentic people, a choice of holiday pace and warm hospitality experiences
- The story of unique adventure is one of road-tripping, exploring, crocodile touring, mountain-biking and bucket-listing
- The story of the Outback is one of red dirt, wild fishing adventures and true outback style.





Visitor profile

Airline access has made tourism the key driver of a regional economy with two World Heritage Areas – the Great Barrier Reef and the Wet Tropics rainforest. In 1971 visitor spend was at \$50 million and by 2019 was worth \$3.2 billion with tourism contributing around 18% of Tropical North Queensland's gross regional product and supporting one in five jobs.

Tropical North Queensland is the most popular regional destination in Queensland for international visitors with a 33% market share. Our destination has an 8% share of the state's domestic visitors.

The domestic market delivers the most visitors and expenditure. China is the largest international source market, while Europe delivers High Value Travellers who stay longer.

Cairns was the nation's best performing hotel market for four years in a row until second quarter of 2018. *(Source: CBRE Hotels MarketView)*

With the region's population of 285,000 forecast to grow 1.3% per year over the next decade, our goal is to support the region's economy by delivering \$3.5 billion in visitor expenditure by December 2020.

Target markets

Domestic High Value Travellers (HVTs)

These travellers spend more than the average visitor on leisure trips and are aligned to Queensland's competitive offering, indicating they are interested in the types of leisure experiences Queensland has to offer. In the interstate market, HVTs represent 35% of interstate leisure trips, but 63% of overnight visitor expenditure, highlighting their disproportionate share of spending. In the intrastate market, HVTs represent 36% of intrastate leisure trips and 71% of overnight visitor expenditure.

International Experience Seekers

International travellers seeking an inspiring nature-based destination are targeted through our international campaigns. These campaigns also target HVTs.

Education visitors

In 2018, one in 24 international visitors to Queensland were education visitors. Of those, 16% were visited by family and 10% by friends while they were in Queensland. Education visitation has grown 9% over the past three years, with the top four source markets being China, Japan, the USA and Korea. More than 32,000 international students from 34 countries chose to study in Cairns in 2017.

December 2018 visitors



Total expenditure
\$3.5 billion



Total visitors
2.9 million



International visitors
863,000



Domestic visitors
2.1 million

December 2018 key source market visitors



Domestic
2.1 million visitors



China
206,000 visitors



Europe
156,000 visitors



Japan
111,000 visitors



North America
134,000 visitors



United Kingdom
81,000 visitors



New Zealand
40,000 visitors

Community perception scorecard

Tropical North Queensland residents are the most likely in Queensland to feel that tourism has a positive impact. 80% of residents agree that tourism has a positive impact on the community, compared with 43% in Queensland. More than a third (37%) agree that tourism has a positive impact on their personal quality of life, compared with 18% in Queensland. Frequent contact with tourists in the region, as well as the industry's 17% contribution to the local economy, may raise awareness of tourism's positive impacts. (Source: *Tourism Events Queensland Social Indicators 2018 Queensland Report*)

The destination has an average Tourism Sentiment Score of 30 with strong sentiment scores for outdoor activities, tours and breweries, distilleries and cocktail bars. (Source: *Destination Think! Tourism Sentiment Index*)

Events

Leisure events

Events are a vital part of the tourism offering in Tropical North Queensland, especially in the shoulder seasons, as they give people a reason to visit the destination at different times of the year. They also give us an opportunity to showcase the region through media coverage of the event.

TTNQ has an events prioritisation strategy, which has assisted in bringing new events like Targa Great Barrier Reef to the region in 2018.

International events such as the Ironman Asia-Pacific Championships bring enormous economic impact and have helped position the region as an international sporting destination, with other international events including:

- World Rafting Championships (May 2019)
- Red Bull Defiance (September 2019)
- Regional events are also held throughout Tropical North Queensland, adding to a diverse cultural and sporting event calendar
- It is estimated that events provide \$20 million to the TNQ industry

Business Events

The economic impact of business events in 2018 was \$111 million, more than double the previous year's total of \$45 million. There has been growing interest in holding events in Tropical North Queensland following the staging of the AMWAY China Leadership Seminar, which brought 6,500 delegates to the region in March and April 2019.

The team at Business Events Cairns & Great Barrier Reef organises Sell TNQ every year, hosting meeting planners from Australia and New Zealand. The team also attends AIME (Asia Pacific Incentives and Meeting Event), hosts a Regional Showcase in Brisbane, Sydney and Melbourne, and participates in major international events in the key markets of China, the US and New Zealand.

Investment in the region

Cairns city has undergone a tourism renaissance in the past 18 months, with millions of dollars of new infrastructure built. This includes:

- \$130 million Crystalbrook Collection five-star hotel Riley
- Hemingway's Brewery
- \$50 million Cairns Aquarium
- \$10 million Munro Martin Parklands upgrade
- \$13 million Shangri-La, The Marina Cairns refurbishment
- \$8.7 million Cairns Museum
- \$70.4 million Cairns Performing Arts Centre
- \$55 million Domestic Airport upgrade

Other investment in the region:

- Barramundi Discovery Centre, Karumba

Infrastructure under construction and about to start includes:

- \$120 million Crystalbrook Collection five-star hotel Bailey
- \$120 million Crystalbrook Collection five-star hotel Flynn
- \$176 million Cairns Convention Centre expansion
- \$550 million Nova City residential and commercial city development.
- \$21 million Wangetti Trail
- \$7.7 million Northern Beaches Leisure Trail
- \$200 million Port Douglas Crystalbrook Marina



Local government tourism infrastructure priorities

Cairns Regional Council

- Global tourism hub
- Cairns Arts, Cultural and Events Precinct

Douglas Shire Council

- Development of the Wangetti Trail
- Establish Douglas Shire as an eco-tourism destination
- Port Douglas waterfront precinct including Crystalbrook Marina

Tablelands Regional Council

- Tablelands Visitor Centre and tourism hub
- Atherton to Herberton heritage rail trail extension (linking in with Atherton Forest Mountain Bike Park)
- Atherton Forest Mountain Bike Park expansion
- Develop local food tourism experiences

Cassowary Coast Regional Council

- Cardstone Village – tourist eco centre for rafting, hiking and mountain biking
- Improved charter boat and super yacht at Johnstone River
- Tourism signage – directional and interpretive
- Innisfail Town centre revitalisation

Mareeba Shire Council

- Ootann Road
- Burke Development Road (BDR)
- Kuranda Range Road

Torres Strait Island Regional Council

- Interactive kiosks at Horn Island Airport and Thursday Island
- Develop sustainable tourism experiences for the Torres Strait Islands. The experience will be developed by:
 - Enhanced network of island accommodation facilities
 - Island attractions and tours that celebrate the culture
 - Island cruise shipping and boating network
 - Integrated booking and visitor information centre and systems

Cook Shire Council

- Reconciliation Rock Monument
- Lakeland tourism gateway and information centre

Pormpuraaw Aboriginal Shire Council

- New Eddie Davey Guesthouse with 11 rooms in total

Carpentaria Shire

- Mutton Hole Wetlands
- Road sealing along the Savannah Way main route – dual carriageway to Burketown

Hope Vale Aboriginal Shire Council

- Boat ramp
- Public toilets and showers for tourists.
- Digital infrastructure

Croydon Shire Council

- Croydon Mountain Bike Trails

Burke Shire Council

- Burketown Thermal Springs development
- Lawn Hill / Riversleigh Tourism Plan and Waanyi Cultural Centre

Etheridge Shire Council

- Road sealing along the Savannah Way main route – dual carriageway completion
- Talaroo Hot Springs
- Terrestrial Centre upgrade

Mapoon Aboriginal Shire Council

- Visitor Accommodation Deluxe – 11 self-contained, disability accessed \$2.1 million
- Visitor Accommodation standard – 33 bed accommodation
- Internet based accommodation booking system for camping grounds and accommodations
- Upgrade of Cullen Point Camping ground – \$150,000
- Café facility – \$300,000
- New fully lit bitumen airport – \$4.5 million

Weipa Town Authority

- Tourism Infrastructure Development Plan
- Expanded accommodation options across Weipa
- Upgrades to the Weipa Regional Airport

Lockhart River Aboriginal Shire Council

- New Lockhart River Airport terminal

Wujal Wujal Aboriginal Shire Council

- Wujal Wujal Eco Village

Cape York regional priorities

- Ongoing sealing of the Peninsula Development Road (PDR)
- Bridge over the Jardine River

Opportunities and challenges

There is a rising demand for more experiential travel, personalisation and authentic experiences as the tourism industry matures and more people travel. This presents opportunities and challenges for Tropical North Queensland.

Opportunities

- Build capability of Indigenous operators to be internationally ready
- Promotion of Indigenous tourism experiences to ensure TNQ is recognised as Australia's leading Indigenous tourism destination – development of third pillar
- Product development – food trails, hiking and cycling trails, bird watching
- Further development and promotion of self-drive itineraries across domestic and international source markets to expose diversity of regional food, beverage, nature, adventure, culture and communities
- Attraction of major sporting events with an opportunity to grow participation from international markets
- Growth in direct aviation capacity – domestically and internationally (Middle East, China, USA, NZ, Southeast Asia)
- Working Holiday Maker global campaign to re-invigorate backpacker and youth travel from Western markets
- Niche and special interest segments – domestic Chinese and Indian diaspora, international students within Australia, hands-on authentic local experiences
- Tourism and Events Queensland Best of Experiences Program – lift quality of product and experiences within destination
- New infrastructure developments = new product to offer
- Citizens of Great Barrier Reef – position the destination as a world leader in conservation of global natural assets
- Strengthen partnerships with Tourism and Events Queensland, and Tourism Australia
- Find PR opportunities with other industries to develop the brand awareness (tropical fruits)

Challenges

- Negative messaging around coral bleaching on Great Barrier Reef
- Fragmentation and diverse agendas of stakeholders, LGAs/LTOs
- Non-sustainable funding model, and heavy reliance on small number of key funding partners
- Reliance on sustainability of two key iconic assets → diversity of region's assets not maximised
- Large number of small tourism businesses not 'internationally/trade ready'
- Digital capability of industry
- Internet connectivity – poor or non-existent in some areas
- International airport underutilised
- Direct aviation access from Western markets
- Domestic aviation and accommodation capacity under pressure during peak periods
- Collaboration and communication between key industry stakeholders
- Slow development of additional product pillars e.g. Indigenous, food tourism
- Labour force challenges – especially during peak periods and in more remote areas
- Limited infrastructure capacity for large events
- Limited co-ordination of economic and destination planning between regional stakeholders
- Lack of re-investment by suppliers to upgrade/enhance product and experience offering
- A vast region to cover with high costs and difficult access
- Lack of subvention funding for Business Events
- Region has rested on laurels and not evolved fast enough. It has lost market share.



TTNQ's strategic direction

The TTNQ 2019-2020 Strategic Direction sets the agenda for our organisation to shift gears, unite the industry and lead the way forward to the vision of becoming one of the world's most inspiring nature-based destinations. This two-year plan will enable TTNQ to move quickly in a fast-changing and competitive world to ensure Tropical North Queensland is the destination people around the world want to visit.

Vision

To position Tropical North Queensland locally, domestically and internationally as a world-renowned nature-based tourism destination, set in world heritage reef and rainforest, that people everywhere are compelled to visit.

For TTNQ to be recognised as a results driven, highly valued and respected organisation, working in partnership with our stakeholders to deliver world class, innovative destination marketing

Mission

Provide sustainable growth in tourist visitation, business events and revenue through the effective destination marketing of a unified brand using current and emerging technology, partnerships and innovation.

Unify the tourism industry by displaying strong contemporary leadership, expertise and excellence

Mastering Our Story

Revive and reposition the region's image

Destination Marketing

Sustainably grow visitor arrivals and expenditure to the region

Values

Continuously look for opportunities to deliver value

Best Practice

Operate within a culture of best practice, continuous improvement return-on-investment, focus, efficiency and knowledge sharing

Business Sustainability

Operate within a sustainable business model

Business goals

- Revive and reposition the region's image
- Sustainably grow visitor arrivals and expenditure to the region
- Continuously look for opportunities to deliver value
- Operate within a culture of best practice, return on investment focus, efficiency and knowledge sharing
- Operate within a sustainable business model





Our image

Several cluster groups have been formed to bring together tourism operators offering similar experiences. This has given us the opportunity to look closely at the stories we promote for each of these experiences.

The cluster groups are:

- Adventure/Backpackers
- Food and beverage
- Great Barrier Reef
- Luxury and super yachts
- Indigenous Experiences (Aboriginal and Torres Strait Islander)
- Rainforest

Some of the key strategies of these cluster groups include:

- Elevating timeless experiences as part of Tourism Australia's Signature Experiences activities
- Appointing an Indigenous mentor to assist with tourism development in this sector
- Public relations activities to focus on the health of the Great Barrier Reef
- Working with the Wet Tropics Management Authority, Tourism Australia and Tourism and Events Queensland to elevate the world's oldest rainforest as part of Queensland's brand
- Assisting Wet Tropics with a project to connect the tourism industry to Wet Tropics Endangered Species
- Lobbying for the removal of GST charges on international super yachts doing charter work in Australia
- Identifying the region's key food and beverage experiences.

Key deliverables

TTNQ's key deliverables for 2019/20 are:

- 'Mastering our Story' for Tropical North Queensland and marketing this to the world
- To position TNQ as "the" bucket-list destination for travellers in major metro cities using the brand story
- To generate awareness of factual information around the region and convert strong visitation to TNQ in 2019/20 through a clear call to action
- To target High Value Travellers to the region
- To promote the numerous TNQ experiences capturing relaxed tropical vibes, Indigenous connection and unique nature.
- The Wet Tropics Rainforest and Great Barrier Reef are interwoven along with the ancient and timeless experiences throughout the brand story
- To review and update the TNQ Regional Events Prioritisation Events Strategy in conjunction with key stakeholders
- To grow shoulder visitation and destination dispersal through the attraction and promotion of sports, lifestyle and cultural events
- To increase visitation by attracting business incentive groups, meetings and events
- To advocate growth of the TEQ Subvention Program fund
- To pursue continuous development of our digital capability
- To deliver the Digital Strategy and provide digital leadership to the tourism industry on the new 'modern marketing approach'.

Product development

- To further develop Indigenous products and promote the region as a recognised leader in Indigenous tourism
- A two-year partnership with the Torres Strait Regional Authority (TSRA) to collaborate on the development of Indigenous tourism opportunities in the Torres Strait Islands
- To deliver \$1.5 million grant funding under the Connecting With Asia Fund to support Indigenous tourism businesses
- To work with key partners to grow and develop eco-tourism opportunities in the region such as the Wangetti Trail
- To develop and promote Tropical North Queensland as a leader in diving experiences
- To develop the story of the Wet Tropics World Heritage Area in consultation with key stakeholders

Great Barrier Reef messaging

Perception around the world that the recent back-to-back bleaching events have destroyed the Great Barrier Reef is being tackled through partnerships with Tourism Australia, Tourism and Events Queensland, Citizens of the Great Barrier Reef, Great Barrier Reef Marine Park Authority and the Reef and Rainforest Research Centre. With our partners TTNQ has elevated messaging about the Reef's health and the measures being taken to preserve it.

We have been attending International Media Marketplace in key markets to secure one-one-one appointments with leading travel writers and influencers to discuss the state of the reef with them.

TEQ in partnership with Uber and the five GBR RTOs launched scUber to the world in May 2019 giving visitors a once-in-a-lifetime opportunity to experience the reef on a ride-sharing submarine. This initiative is generating millions of dollars in publicity and showing people around the world that the Great Barrier Reef is worth visiting.

Digital leadership

New digital technologies are playing an increasing role in how we tell our destination story and TTNQ is committed to using these to ensure members will receive immediate benefits. It is important that the whole industry excels in this space. As part of our role to build industry capacity, we have conducted workshops to build the digital capacity of the region. These include programs through the Australian Small Business Advisory Services – Northern Australia Tourism Initiative service.

Infrastructure

- To support the development of key infrastructure that will increase the resilience of the tourism industry and the regional economy
- To advocate for quality telecommunication coverage throughout Tropical North Queensland
- To provide support to major development proponents in terms of gathering market intelligence and insights to assist the formation of business cases for major investment decisions
- To support the development of the Cairns Arts, Cultural and Events Precinct and work closely with the Cairns Regional Council
- To support the delivery of the Cairns Port Shipping Development to increase access for the cruise ship market
- To support the development and delivery of the Global Tourism Hub with key stakeholders
- To support the development of key roads in the region to encourage regional dispersal.

Aviation

Government funds are required to launch new aviation routes and create brand awareness for long-term route sustainability. Currently, 75% of international visitors through Cairns Airport travel on domestic flights, constraining the number of seats available for domestic visitors and limiting the ability to grow domestic visitation.

Aviation access is integral to the further development of the economy in Tropical North Queensland. A daily international wide-body flight to Cairns is potentially a \$200 million a year export business, with \$100 million of international visitor spend, \$50-150 million of agricultural produce sales, and more than 650 new jobs for the region. There are flow-on benefits as other trade is enabled by new air routes. These benefits are widely dispersed across businesses in the region.

TTNQ aims to grow direct international capacity to Cairns Airport by working with our partners to ensure existing routes are sustainable and attracting new routes to further develop our key markets.





Strategic Priority Projects

Through the development of the Destination Management Plan the stakeholders identified six strategic priority projects that will make the greatest contribution to the vision and deliver greater:

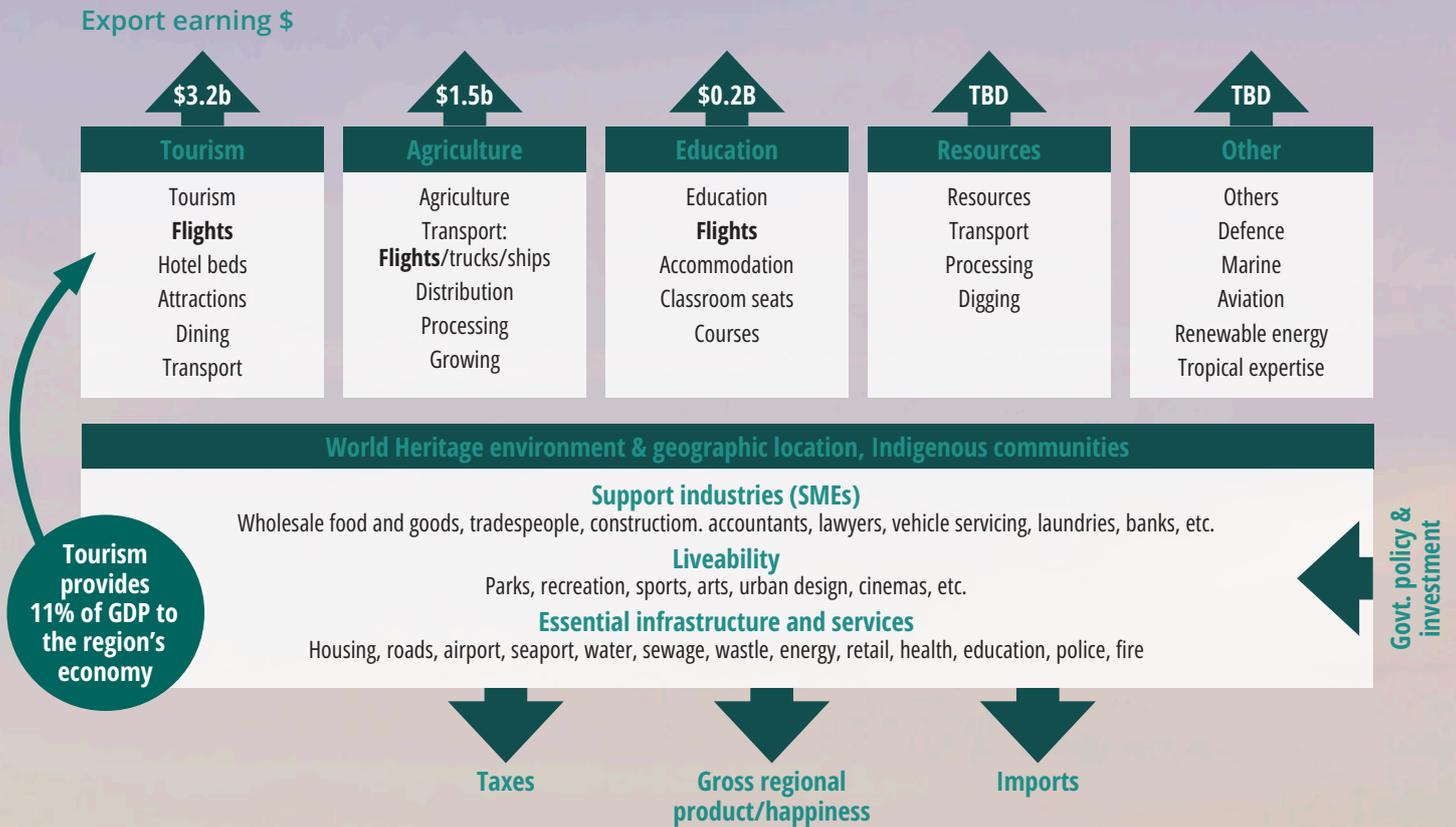
- Share of voice in our key markets;
- Visitor expenditure (through growing numbers, nights and spend per person);
- Regional and Seasonal dispersal; and
- Visitor Satisfaction.

The six projects identified with the lead agency and commencement time-frame are outlined below, it should be noted that the lead agency is not solely responsible for the deliverables and the projects are expected to operate over the life of the Destination Tourism Plan.

PROJECTS	LEAD	BY WHEN
Project 1 Development of our shared brand story to showcase the unique experiences across the region and launch it in the domestic and international market with a three-year program of delivery.	TTNQ	June 2020
Project 2 Build stronger partnerships with industry, trade and the tourism community to amplify and share the regions story in our key markets backed by clear KPIs and the appropriate level of investment through new partnerships and funding models.	TTNQ	December 2020
Project 3 Develop a shared priority list for aviation and access to align the marketing and route development strategies supported by more frequent engagement with industry (through the Strategic Panels) and documented in three-year priority market strategies.	Cairns Airport / TTNQ	June 2020
Project 4 Work with industry get the customer to engage in our brand story through an experience development program for our region and our brand story including a positive approach to telling the story of the Great Barrier Reef, the Wet Tropics, the Outback and our two Indigenous cultures.	TTNQ	June 2020
Project 5 Increase our focus on business and leisure events , including stronger links other industry sectors, to drive high value travellers across the year and across the region with a significant events bid fund and strategic approach to event attraction.	TTNQ / Councils	June 2021
Project 6 Relaunch the Drive North Queensland partnership working with Townsville Region and Outback Queensland to increase the region's share of the drive market and support a calendar of community and signature events that attract visitors.	Local Tourism Organisations / TTNQ	February 2021

Regional economic growth framework

Tropical North Queensland has the potential to develop into a resilient, diverse and flourishing economy, anchored around tourism, agriculture and resources, with further growth areas including education, defence, marine and aviation. While somewhat geographically distant, further growth in connectivity via air, road and sea will help the region capture the opportunities provided by increasing trade and travel. Tourism, trade and education are all seasonal industries, and require many links in complex value chains to be connected. This framework illustrates those connections.



Conclusion

The Tropical North Queensland tourism industry has the desire, ambition and capacity to further develop the region as a tourism destination. Having two World Heritage areas side by side is the destination's competitive advantage and this is reflected in our vision to be the world's best destination to engage with nature. Development of the region must be compatible with our natural assets for it to succeed.

Tropical North Queensland is a diverse region with many stories which must be leveraged and communicated effectively to broaden the understanding and appeal of the destination.

These stories are being captured through our hero experiences to show the diversity of the region and its products. New product that adds to these experiences and showcases our three pillars – the Great Barrier Reef, the world's oldest rainforest and Indigenous culture – will further amplify the appeal of Tropical North Queensland.

Partnerships are integral for further development to succeed. TTNQ is committed to working in partnership with the industry and our stakeholders to grow tourism as an economic driver that will deliver \$3.5 billion to the Tropical North Queensland economy in 2020.