

# The Whitsundays

Destination Tourism Plan 2019 – 2024



# THE WHITSUNDAYS DESTINATION TOURISM PLAN 2019 - 2024

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# EXECUTIVE SUMMARY

## VISION

To showcase the Whitsundays as the globally recognised Great Barrier Reef destination.

## AIM

To increase overnight visitor expenditure

### FROM

**\$956 M**

2018 actual

### TO

**\$1.53 B**

2025 base target

THROUGH

Continuation of trend 2014/2018

### TO

**\$2.14B**

2015 stretch target

THROUGH

Increased average length of stay and average daily spend

### 8 KEY ACTION AREAS

1. One Whitsundays
2. Access
3. Product Development
4. Experience development
5. Brand and Marketing
6. Events
7. Risk Management
8. The Environment

### CONTAINING

38 detailed actions

### MEASURED BY

39 KPI's

This version of the Whitsundays Destination Tourism Plan (DTP) is an update of the 2014 – 2020 plan and covers from 2019 to 2024.

There have been significant changes since the last plan was developed.

The Regional Tourism Organisation (RTO) Whitsunday Marketing and Development Ltd split its tourism and economic development divisions into two organisations with Tourism Whitsundays taking responsibility for tourism in 2016.

As the DTP was being developed Tourism Whitsundays with support from the Whitsunday Regional Council was developing a new brand for the Whitsundays and council was developing an Events Strategy.

At the time of the last DTP the industry and Whitsunday Regional Council were pushing for an upgrade of the Whitsunday Coast Airport at Proserpine to handle international flights. Since then the direction has changed with an emphasis on increasing frequency and flight sectors for the domestic market and improving connectivity to international gateways for the international market with the ability to handle international charters.

Severe Tropical Cyclone Debbie crossed the Queensland coast at Airlie Beach on 28 March 2017 after wreaking havoc on the Whitsunday Islands. Damage was severe throughout the entire Whitsundays region and resulted in a wide range of tourism product being closed for some time. Many products took the opportunity to update while repairing cyclone damage and as a result there has been an improvement in product standards.

The 2014 DTP was predicated on the 2020 Visitor Expenditure targets. Introduced in 2011, the Tourism 2020 strategy is a joint partnership between the Australian Government and the tourism industry with a goal to double overnight expenditure in Australia to between \$115 billion and \$140 billion by the end of 2020.

The Queensland Government signed on to the Strategy as a partner and as a result so did the Queensland Regional Tourism Organisations. The Whitsundays was given a target for Overnight Visitor expenditure made up of visitor numbers, visitor nights, average stay and average daily spend.

In order to deliver on the vision and the targets for 2020, each RTO has led the development of a Destination Tourism Plan (DTP). These plans were developed in partnership with Local Government, State Government, Industry Associations, and Tourism and Events Queensland (TEQ) to set the direction for the future of tourism and events in each destination.

In spite of Cyclone Debbie the Whitsundays have done well towards reaching the 2020 growth targets. The statistics to end of 2018 show that the region has achieved the 2020 targets in International, Interstate and Intrastate visitor numbers but length of stay and average spend are behind the targets and have to be lifted. Some of this may occur naturally with the reopening of resorts mid-2019. The challenge of identifying and providing more new activity and tour product delivering the WOW experience needs to be addressed and met.

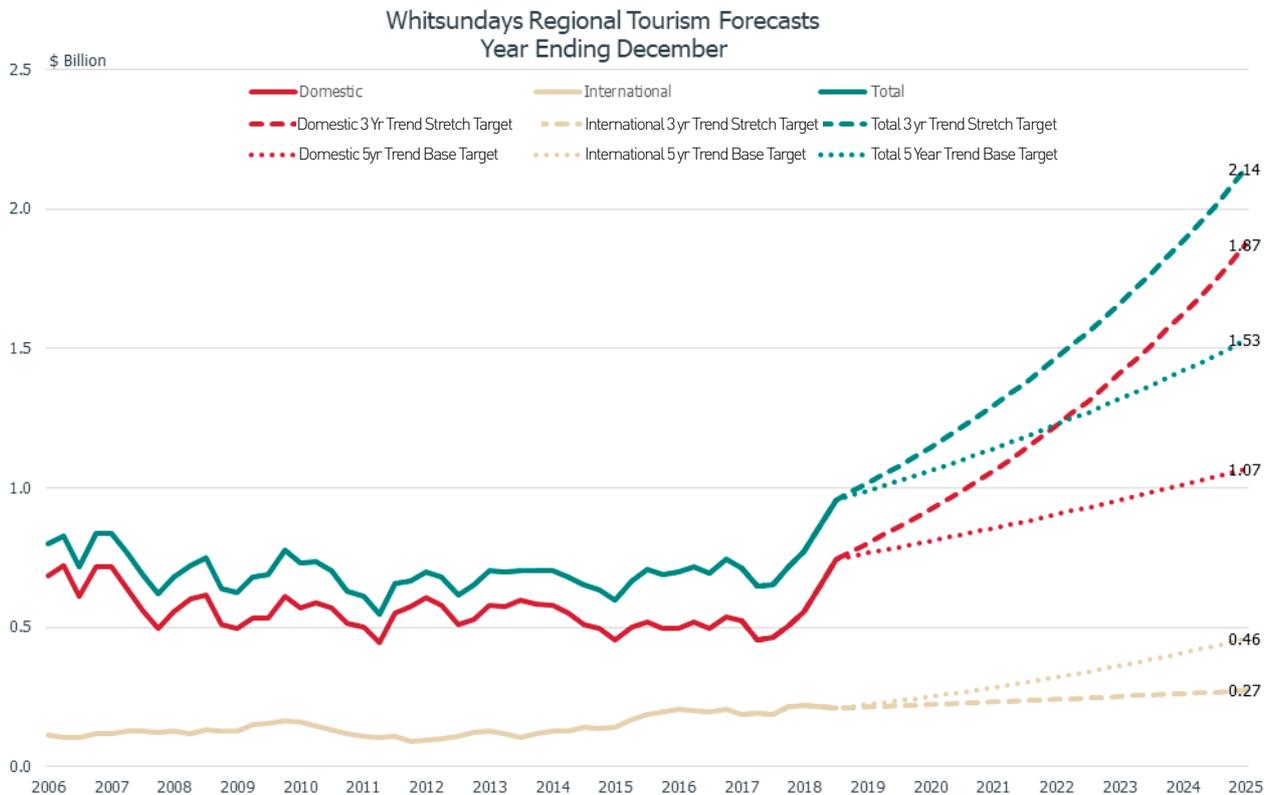
#### Whitsunday Key Performance Statistics since the 2014 DTP including 2020 targets

			Target				Target				Target				Target
Year ending	2013	2018	2020	2013	2018	2020	2013	2018	2020	2013	2018	2020	2013	2018	2020
Source of visitors	Visitors 000			Average stay			Room nights 000			Average daily spend			Contribution to annual visitor expenditure \$M		
Domestic Queensland	279	398	340	3.36	3.36	4.0	938	1,401	1,360	\$269*	\$249*	\$333*	\$253	\$745	\$453
Domestic Interstate	193	252	240	6.23	6.23	6.9	1,203	1,595	1,656	\$269*	\$249*	\$333*	\$342		\$561
International	181	234	210	7.12	5.5	7.5	1,289	1,294	1,575	\$99	\$163	\$145	\$128	\$221	\$228
Subtotal	653	884	790				3,430	4,290	4,591				\$705	\$956	\$1,233
Domestic day trips	249	TBA	300										\$32	TBA	\$51
Total	902		1,090				3,430	4,290	4,591	\$130**		\$170**	\$737	\$956	\$1,284

\*Note, there is no analysis or break up in statistics provided to differentiate the daily spend between intrastate and interstate visitors so the same figure per night has been used in this table.

\*\*Assumptions from the 2014 DTP, no domestic day trip numbers were available at the time of compilation of this table

## 2025 Growth Targets



Targets haven't been set yet for 2030 so the results to 2018 have been graphed and extrapolated out to 2025. Two scenarios have been calculated.

- The first is the base target of \$1.53b with a 'business as usual' approach and no new initiatives being undertaken.
- The second is a stretch target of \$2.14B which will depend on the take up of initiatives and actions indicated in the DTP and a continuation of market conditions.

The fact that the 2020 target visitor numbers have been realised in 2018 but average stay and spend have not been reached confirms industry consultation feedback that more needs to be done to extend average stay and spend. In a relatively fragile eco destination such as the Whitsundays the focus should not be solely based on visitor numbers.

To achieve this the destination will need a combination of new product and marketing. If the Whitsundays are to achieve a cumulative 4% annual growth (base target) or 12% (stretch target) in annual visitor expenditure over the next 6 years there will have to be an ongoing marketing effort to grow traditional and emerging markets to attract new high-yield markets, its not just about attracting more visitors its about extending the length of stay and daily spend.

It is recognised that there is a strong need for more events, increased mainland product and infrastructure that caters to families, the drive market and provides bad weather alternatives (this will also support efforts to substantially grow the resident population).

Tourism is an important driver of the Queensland economy, creating jobs, attracting investment and sustaining communities.

The Queensland Government has a long-term commitment to grow the state's \$25 billion tourism industry and cement Queensland's position as a world-leading tourism destination.

Tourism and Events Queensland (TEQ) is a statutory body of the Queensland Government and the State's lead

marketing, destination and experience development and major events agency. Their goal is to continue growing Queensland's tourism and events industry to foster innovation, drive industry growth and boost visitor expenditure. Partnerships are central to how we deliver outcomes, collaborating with Government, Tourism Australia (TA), Regional Tourism Organisations (RTOs), industry and commercial stakeholders.

The Tourism Industry Development Department is responsible for tourism policy, tourism investment attraction, infrastructure and access, industry engagement and innovation as well as major events.

Being aware of numerous megatrends that will impact the industry in the coming decade the State Government has identified six key themes upon which tourism development should be based, namely;

- Preserving our nature and culture
- Offering iconic experiences
- Targeting a balanced portfolio of markets
- Delivering quality, great service and innovation
- Building strong partnerships
- Growing investment

Located halfway along the Queensland east coast (and midway along the Great Barrier Reef) the Whitsundays region incorporates both mainland communities and 74 islands. The regional economy is heavily reliant on tourism with approximately 3,000 people being directly employed in the industry. Airlie Beach and the Islands are the main tourism precincts. Local government is focussed on growth and development and Cannonvale-Cannon Valley are key residential growth precincts, because of their close proximity to Airlie Beach and the coast, and the lifestyle appeal of this tropical destination.

Located adjacent to the inland Bowen and Galilee Basins (major coal and gas reserves and industries) the Whitsundays is recognised as a key marine and coastal playground for both the region and Queensland.

The Whitsundays is well recognised nationally (and in some areas internationally) as an attractive tropical destination offering numerous unspoilt and reef fringed islands to explore; great sailing (and related events); a place to unwind and party; luxury resorts and a honeymoon/weddings/romance destination. Bowen is a winter escape for grey nomads and families from the south who flock to fill caravan parks and resorts to enjoy coastal activities (particularly fishing). Proserpine and Collinsville provide opportunities for rural tourism.

## KEY ACTION AREAS

### One Whitsundays

The Whitsunday region has a small population and business base that delivers well above its size. Tourism provides approximately 40% of jobs which is the highest in Queensland and one of the highest in Australia. There has been a tendency in the past for the region to be split on geographical and sectoral lines, this has improved since Cyclone Debbie and this change needs to be supported and nurtured. It is important that each organisation that is involved in promoting and developing tourism and events works cooperatively. It is essential that key organisations such as the Whitsunday Regional Council and Tourism Whitsundays develop a Partnership document that outlines roles and responsibilities so there is no duplication of effort and issues don't fall between the cracks. The industry needs to 'hunt as a pack', to support each other and work cooperatively for the benefit of the Whitsundays.

### Access

Year-round affordable access is essential to the Whitsunday region. Mode of transport is split evenly between land and air with airports at Proserpine (Whitsunday Coast) and Hamilton Island. Focus is now concentrated on building frequency on existing domestic routes, increasing the number of direct routes and providing easy connections for international visitors over international gateways. That strategy provides an attractive range of services for domestic passengers boosted by international connectors concentrating numbers and giving airlines sustainability

to continue to grow flights. Tourism Whitsundays needs to work cooperatively with airlines, airports, TEQ and the tourism industry to support flights particularly in low seasons and to attract new services. Consistency, quality, frequency and a good range of airfares are paramount.

Road access is important to the regional and touring market. Visitors do not want to face the prospect of being flooded in during periods of bad weather. Roads, in particular Shute Harbour Road, Hamilton Plains and the Bruce Highway, Goorganga Plains flood and make access between Airlie Beach, Proserpine, Proserpine Airport and the Bruce Highway impossible. Whitsunday Regional Council has been working with Transport and Main Roads to upgrade these roads to provide greater resilience from flooding.

## Product Development

Industry continues to identify the need for more mainland attractions, activities and tours. The challenge is to make those profitable, anecdotally the region has lost products over the past ten years due to lack of year-round support. In spite of many projects being identified in the last DTP most of those have not been built. Industry needs to promote and sell the tours and attractions. Tourism Whitsundays needs to develop and distribute digital and paper-based maps disbursing visitors around the region promoting both new and existing attractions, tours and activities.

Whitsunday Regional Council has commissioned feasibility studies for Flagstaff Hill Conference and Cultural Centre at Bowen and Lake Proserpine Barramundi Fishing and Interactive Nature Recreational Precinct and raised grant funds to expedite their development. They are also planning a Marine Centre of Excellence in Bowen and are restoring Shute Harbour following damage from Cyclone Debbie.

A Bowen group is building a business case for a Catalina Flying Boat display commemorating Bowen's strategic role as a sea plane base in World War 2.

The rebuilding of structures damaged by Cyclone Debbie has brought forward planned improvements on a number of properties. Hamilton Island is fully operational, Daydream Island re-opened in April 2019, the Intercontinental Hayman Island re-opened mid-2019 and South Molle Island has been sold for redevelopment. The number of closed resorts is not a good look for the Whitsundays. The owners of Lindeman Island have announced redevelopment plans. That still leaves Long Island Resort, Hook Island Resort, and Laguna Quays without firm redevelopment plans. Note Lindeman and Laguna are technically in the Mackay Regional Council area but have been serviced and sold as part of the Whitsundays in the past.

The last DTP identified a need for a five-star branded hotel and entertainment precinct at Airlie Beach. The Whitsunday Regional Council's Economic Development Strategy contains an action to complete planning and development approvals process necessary for this under the Airlie Beach Foreshore Masterplan. During consultation for this DTP industry felt there was a need to develop a Tourist Accommodation Strategy which would identify the need for additional accommodation by type in the area. This should also cover the need and feasibility for a convention centre.

- Whitsunday Skyway Project (priority project)
- Reef Education & Training Facility (possible location Grubby Bay)
- Development of Mountain Bike tracks around the region to increase landbased activity
- Maritime Education and Training Facilities in Bowen
- Enhanced Maritime Education & Training Facilities in Airlie Beach at the Whitsunday Sailing Club
- Marine & Slipway and Engineering services in Bowen
- Great Barrier Reef Marine Park Authority office in Airlie Beach
- Grandiose water park or a wave pool in Airlie Beach
- Establishment of fishing facilities and piers in Airlie Beach
- Dive wreck in the Whitsunday Marine Park
- Completion of all stages of Lake Proserpine Recreation Facilities
- Completion of Flagstaff Hill Interpretive Centre
- Mine tour in Collinsville
- Solar farm tour in Collinsville
- Paddock to plate centre in Bowen

## Experience Development

Visitors are more and more looking for experiences that enhance destinations and tourism products. To remain competitive Tourism Whitsundays in conjunction with TEQ need to deliver destination and experience development activities including reinforcing Queensland's competitive position through the Best of Queensland Experiences Program, encouraging and supporting the tourism industry to innovate and deliver quality visitor experiences. After the past two years of rebuilding there needs to be an element of fun put back into the visitor experience.

With Chinese visitor numbers increasing rapidly the tourism industry needs to be ready to cater for this important market. Not just with language skills, signage and cultural understanding but with their rapid uptake of new technology the new means of payment through QR codes on smart phones. There is an opportunity for the region to celebrate events such as Chinese New Year.

Regional food and culinary tourism continue to grow world-wide, opportunities identified in the last DTP have not come to life and it is not too late for the Whitsundays to feature their produce and seafood through visitor experiences. Whitsunday Regional Council have identified this in their Whitsunday Region Economic Development Strategy.

## Brand and Marketing

The Whitsundays Regional Council funded a review of the Whitsundays tourism brand in late 2018. The new brand was launched by Tourism Whitsundays in 2019 together with a new Marketing Plan.

### Our Vision

To showcase the Whitsundays as the globally recognised Great Barrier Reef destination.

### Our Mission

We promote the destination globally to increase visitation, dispersal, expenditure and length of stay; driving the economic benefit and sustainability of the tourism industry through marketing and industry development.

### Our Brand

The Whitsunday region will stun you. With its natural beauty and spectacular wonder, it is home to some of the most remarkable places the world has to offer. The tranquillity of the area centres itself on the calm of a simpler life while keeping the marvel of its natural wonders well within reach.

What our environment provides is a testament to its longing to keep people near. The land and locals cultivate a strong connection, where agriculture and farming build livelihoods while fishing and sailing build lifestyles. Here, down-to-earth people grow values that stem from nature and invite all visitors to experience it for themselves.

Everything that flourishes in the Whitsunday region is accompanied by a tropical warmth that extends well beyond the beaten path. It penetrates the region and its people, creating an optimistic outlook that guides us to see every day, rain or shine, as a great day for a new adventure.

Only in the Whitsunday region can you wander farther and still get closer.

## DOMESTIC, INTERNATIONAL AND SECONDARY TARGET MARKETS

### Domestic Target Markets

#### TARGET MARKET

##### Romance

#### DESCRIPTION

Primarily domestic (organic overlap into NZ and some international). This segment includes; honeymoons, babymoos, engagement trips, weddings, anniversaries and romantic getaways.

This market always travels with a significant other, and sometimes includes friends and family.

We suspect that this market is unaware of what the overarching Whitsunday region experience is and is more familiar with specific experiences offered by Hamilton, Hayman and Daydream. There is a perception that safety is a barrier (sharks, stingers, cyclones, etc.). We also believe that the proximity/ease of access for a short break is a barrier. In reality, we are more accessible than competitors (Fiji, Vanuatu, Bali) because of language, customs/immigration, travel time, health factors (water/food), etc.

#### CHALLENGE/OPPORTUNITY

Educate this market about the value proposition that the Whitsunday region really offers relevant to their needs (correcting awareness) and accessibility around proximity and safety (consideration). e.g. online content like Iceland's educational videos and online quiz (Do you really know the Whitsundays to capture data through contesting). Also, an opportunity to create a 'how to do the Whitsundays' tool.

#### TARGET MARKET

##### Big life events

#### DESCRIPTION

This segment is celebrating milestone birthdays, hens/bucks, retirements, promotions, graduations, etc. This is distinct from romantic travel (above). This market will likely travel for a long weekend (3 nights), and travel in groups of friends/family.

For this market there is a mix of being interested in a big splash, not worrying about the budget and those who are concerned over price. The target market may feel as if it is out of their price range, as their perceptions are limited to the islands and do not incorporate the remainder of the region and sailing opportunities.

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## TARGET MARKET

### DINKs

#### DESCRIPTION

Location matters less.

Primarily high net worth couples in major cities in Australia or NZ. Internationally, this market may be 'grown up backpackers' who are naturally adventure-focused traveller and may have visited the Whitsundays before (aligning to TA's market segment: Experience Seekers). This audience is not highly price sensitive and is instead looking for unique experiences.

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## TARGET MARKET

### Aussie families

#### DESCRIPTION

High net worth families taking a holiday, typically during school breaks. Often they come because of a package deal on one of our islands. They may be unaware of the sailing experience or think it is unsafe with kids. This market is focused on major East coast capital cities:

- Brisbane/GC/SC (often Daydream)
- Melbourne (often Hayman)
- Sydney (often Hamilton)

A major challenge is the perception of cost. There is little awareness or consideration. There is a dominant legacy behaviour skewed towards competitive destinations (e.g. Gold Coast).

#### CHALLENGE/OPPORTUNITY

TBD - needs discussion.

May be overlap with other segments (e.g. organic impact from DINK & international activity. May also need to be repeat, if they came for romance/life event). Perhaps we target past visitors. This would require a data-capture tactic in year 1 (e.g. campaign that industry can run to past visitors such as an online knowledge competition that only past visitors could do well on). Going forward there is an opportunity to instill a program to capture traveller data (email/social connections).

NOTE: Many of the back-of-napkin assumptions we have made about target markets should be researched and validated over time.

## International Target Markets

### TARGET MARKET

#### Backpacker

### DESCRIPTION

Primarily originating in the UK and Germany but overlap into other international markets. UK travellers often drink and party in Airlie Beach and participate in group sailing experiences. Whitsunday region is typically just one of many stops on a self-drive Australian trip. The German market is more likely to be driven by GBR and aligned with environmental conservation.

This could be individual travel or small groups of friends.

Influencing this market is Tourism Australia's and TEQ's role (we do not have resources to do this effectively).

We suspect that in recent years, backpackers are treating Australia as one part of a South Pacific trip (incl. NZ) and not coming to the Whitsunday region as often. This challenge is amplified by the ease of obtaining visas in other markets.

This market is a valuable market segment and has a high lifetime value because they can be advocates and return as visitors in another market segment. Word-of-mouth is a very important influence in this segment.

We are concerned that our product may not be meeting market expectations in this segment.

12% (118,527 in 2018) of backpackers who come to Australia come to the Whitsundays. This number declined 6% from the previous year.

### CHALLENGE/OPPORTUNITY

We need to make sure that every backpacker who comes to Australia:

- Comes to the Whitsundays as part of the trip
- Has the 'full' experience (i.e. 7 days, not 2 nights)

The opportunity is to target backpackers after they have booked a trip to Australia (in the intent/planning phase). ex 1) on OTA confirmation page. This is important for in-market activities in Germany for backpackers it should be focused on the period after the backpacker has already made the decision to come to Australia (after they have booked a trip).

ex 2) after they have landed in Australia through a co-op (digital and in-agency) campaign with trade partners in key gateways (such as Sydney) who are selling 5 nights of Whitsundays in their tours.

Identify and collaborate specifically with trade partners that are passionate/loyal and knowledgeable about the Whitsunday region experience.

Our goal is that a high % of backpackers coming to Australia visit the Whitsunday region properly.

### TARGET MARKET

#### International

### DESCRIPTION

Our assumption for planning is that the Whitsunday region is not the key motivator for the trip, but the GBR is a key part of an Australia trip (e.g. Sydney + Reef). The primary challenge for this market is shifting from intent to booking an Australia trip. We cannot really afford to influence this at scale. We need to make sure that the Whitsunday region experience (including the best place to experience GBR) is a primary feature on everyone's dream Australian itinerary.

GBR is key aspect to positioning. Sailing is the hero experience to inspire travellers, even if they actually experience in other ways.

Typically, the following geographic markets are priority:

- UK
- Germany - environmentally focused
- US - luxury and the experience
- China - experience (especially for the photo)

German visitors are ideal & aligned to our values.

### **CHALLENGE/OPPORTUNITY**

There's two ways to impact these visitors:

1. Based on interest (diving/snorkelling due to having the reef, sailing the Whitsundays as a bucket list experience and bucket-list adventure travel). Tactics may include either worldstage PR (Condé Nast, Nat Geo) or extremely focused digital marketing based on interest-targeting. There will be a natural overlap from this brand-level activity into other domestic markets (especially DINKs).
2. The instant they have booked an Australian trip, the ideal tactic would include advertising through OTAs and Airlines. Our German trade rep should be focused on niche publications and niche trade shows (rather than broad travel), based on interests (diving/snorkelling, sailing, adventure travel).

Note: we have not specifically differentiated LGBTQ as a market, because they fall within all of our target markets.

## **Secondary Markets**

(requiring no or low investment levels at this stage)

### **TARGET MARKET**

#### **Grey nomad**

Remains a high priority for the region for visitation and Tourism Whitsundays through all marketing efforts.

### **TRAVELLER BEHAVIOUR**

1 to 60 nights

Explore the entire region

Opportunity for free camping in Collinsville

Focus is to talk to this audience from May-Oct, during the cooler months.

### **CHALLENGE/OPPORTUNITY**

Get people to turn off the highway, e.g. using really effective creative on the billboards. There is an opportunity here for Collinsville leveraging 'free camping'.

### **TARGET MARKET**

#### **Grown-up backpackers**

### **TRAVELLER BEHAVIOUR**

Likely included in DINKs and International

### **TARGET MARKET**

#### **Regional drive**

Remains a high priority for the region for visitation and Tourism Whitsundays through all marketing efforts.

### **TRAVELLER BEHAVIOUR**

Typically looking for discount holiday or mining industry workers guys who are cashed up and a bit more flashy.

Events are a driver of travel.

Last-minute booking is typically.

Opportunity to fill wet season.

A priority market in the low season.

#### **CHALLENGE/OPPORTUNITY**

We need to communicate reasons to visit (especially during the wet-season).

Example: social ads/posts, targeted to near-in market, showing reasons to visit: weather, fish caught today, waterfalls when it rains, events, etc. Same tactic would work on local radio or Thursday local news spot.

#### **TARGET MARKET**

**Fishing (fits into others)**

#### **TRAVELLER BEHAVIOUR**

Proserpine is known as the mecca for Barra in Australia

#### **CHALLENGE/OPPORTUNITY**

Feature in content plan.

#### **TARGET MARKET**

**Business Events**

#### **TRAVELLER BEHAVIOUR**

Not a focus its an output of other activity. Play at a brand-level to build reputation.

Generate leads for industry.

#### **CHALLENGE/OPPORTUNITY**

Build web page for lead-gen. Feature case-studies from past event organisers that represent ideal events. Small amount of content to highlight strengths as meeting destination.

#### **TARGET MARKET**

**Endurance events**

#### **TRAVELLER BEHAVIOUR**

Highlight events to relevant target markets (e.g. hero broadly through Australia using targeted digital and smaller events to regional visitors).

#### **CHALLENGE/OPPORTUNITY**

Social and content plan.

#### **TARGET MARKET**

**Cruise**

#### **TRAVELLER BEHAVIOUR**

This is an opportunity for data capture to encourage repeat visitation.

#### **CHALLENGE/OPPORTUNITY**

Greeter program.

## Events

Events are an important component of the Whitsunday tourism industry, particularly in showcasing the region such as Hamilton Island Race Week or in filling off season periods like the Airlie Beach Music Festival.

There is a need to develop new events, improve existing events and upskill event organisers and to find funding sources for events.

The Whitsunday Regional Council launched a Whitsunday Major Festivals and Events Plan in 2019, this is seen as a positive step towards realising the value of this sector to tourism in the Whitsundays.

Business events bring high value visitors to the region. Hamilton Island has a dedicated Convention Centre with smaller meeting facilities at Daydream Island and Airlie Beach

## Risk Management

There are a number of risks for tourism in the Whitsundays, most based around the environment. Coral bleaching from high temperatures and coral damage from tropical cyclone activity are part of a temperature change cycle that is global. The Whitsundays alone can't tackle the cause of these events but can ensure that correct accurate messages are sent out from the area and that visitors and businesses take as many steps as possible to look after the environment.

Lessons learned from Tropical Cyclone Debbie need to be documented and acted on.

The recent spate of shark attacks in Cid Harbour has resulted in the Queensland Government and industry developing and implementing a Five-Point Plan to improve safety in Whitsunday waters.

The increase in international visitors, many of whom cannot speak or read English, has increased the need for multi lingual signs and language skills.

## The Environment

The Whitsunday region, in particular the marine, islands and reef are in a very sensitive environment which can be materially affected by natural events such as cyclones, global warming and by degradation or otherwise by human actions.

The 2014 DTP recommended the updating of the Whitsunday Ecotourism Plan (2008) in order to identify and preserve unique aspects of the Whitsunday environment. This did not occur and should be on the list of actions during the life of this DTP.

The 2014 DTP also identified a need for the development of a Whitsundays Airlie Beach Marine Discovery Centre, a facility providing excellence in interpretation—drawing on science, research and storytelling to provide visitors with an enriching experience. This again was recognised during consultation for this DTP but there was no proponent identified for the project. The redevelopment and expansion of the Living Reef exhibit at Daydream Island may well provide visitors with that experience without the need to duplicate it on the mainland.

The Queensland Government will partner with the private sector to deliver new tourism infrastructure in regional Queensland, beginning with three trails - Thorsborne Trail, Cooloola Great Walk and Whitsunday Island Trail. As part of the Queensland Government's strategy to promote ecotourism, the State is offering duly-qualified Proponents the opportunity to express their interest in developing private eco-accommodation to select national park multi-day walking trails, providing tour guidance operations and other commercially viable ecotourism products and experiences. These trails are envisioned to feature multiple nodes stemming from each trail permitting diverse styles of eco-accommodation to complement existing (and continuing) State-owned campsites found on those trails.

The Whitsundays can lead the way in preserving the environment. This has already begun with the development of the Climate Change Innovation Hub in Cannonvale and lobbying the Queensland Government for the banning of single use plastics. Businesses have already stopped using pollutants such as plastic straws and the Eco Barge has collected 187,877 kg of marine debris/litter since 2009. A whole of destination Whitsundays Eco Action Plan should be developed which must involve council, businesses, Tourism Whitsundays, Chambers of Commerce, Tourism and Business. The plan would identify what needs to be done to reduce degradation of the environment and encourage all partners to take on responsibility for their actions. This would not only improve the environment but could also be a powerful PR campaign to highlight how the Whitsundays is walking the talk and looking after its pristine environment.

## SETTING THE SCENE

The top opportunities and challenges the region faces are identified as;

### Top Opportunities

- New and reinvigorated high value product
- Optimise the regions marketing outcomes particularly in the international market
- Product and experience development
- Events development
- Developing drive tourism
- Working together as a team

### Top Challenges

1. Threats to and decline in the marine and natural environment
2. Access
3. High cost of doing business in Australia
4. Impacts of severe weather events
5. Lack of mainland product and activities
6. Attracting, developing and retaining a skilled workforce

If the Whitsundays are to achieve a cumulative 4% annual growth (base target) or 12% (stretch target) in annual visitor expenditure over the next 6 years there will have to be an ongoing marketing effort to grow traditional and emerging markets to attract new high-yield markets, its not just about attracting more visitors its about extending the length of stay and daily spend.

It is recognised that there is a strong need for more events, increased mainland product and infrastructure that caters to families, the drive market and provides bad weather alternatives (this will also support efforts to substantially grow the resident population).

The need for regional dispersal throughout the region, and more and improved events, will be essential in growing visitor numbers, lengths of stay and expenditure. It is recognised that the domestic grey-nomad, RV's and caravanning markets need to be re-focussed on to take advantage of ongoing population growth and ageing (and the popularity of these lifestyles). This report will recommend now is an opportune time to revisit the Whitsundays Ecotourism Strategy (2008), with ecotourism product aligning well with strategies to maintain and promote the unspoilt natural environment and to develop new family-friendly mainland product and experiences.

### The DTP identifies eight key strategies for the region to focus on

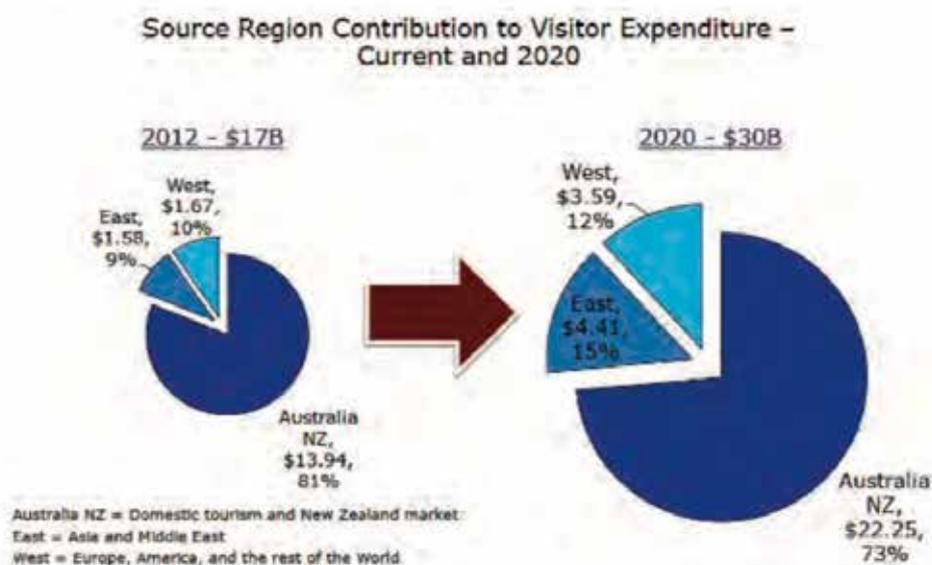
1. One Whitsundays. Working together to grow the region under the one brand.
2. Access. Improving flight and road access.
3. Product Development. In particular more mainland product to increase length of stay, average daily spend and provide an all-weather visitor experience.
4. Experience Development. To give our visitors a great holiday and sense of fun and WOW.
5. Brand and Marketing. To market the Whitsundays under a new brand to existing markets and to seek new growth markets.
6. Events. Attract new events and grow existing events.
7. Risk Management. Ensure the industry is well equipped to handle crises and for the region to work together to mitigate the effects of the crises.
8. The Environment. Protect and promote Whitsundays marine and natural environments.

Having said this, the region will continually evolve its product offerings and marketing activities to ensure it meets the needs of (and grows visitation from) traditional markets.

### Key to the progress of this plan will be;

- Negotiations between Tourism Whitsundays, funding partners and respective government agencies to ensure adequate funds are available for the staged implementation of the plan;
- Engaging business and communities to ensure in kind and volunteer contributions are maximised;
- Attraction of external grant funds to support available agency and community contributions; and
- TW, Whitsunday Regional Council and other agencies getting the balance right between supporting/attracting major developments versus community-economic and small business development.

The Queensland Government has identified tourism as a key component of Queensland's economy and is committed to ensuring Queensland regains its rightful place as Australia's pre-eminent tourism destination. In line with the state governments Destination Blueprint 2012-2015, the industry led by the Regional Tourism Organisations (RTOs), are taking a whole-of-destination approach to tourism to increase visitor expenditure across Queensland from \$21.5 billion in 2012 to \$30 billion by the year 2020. The following diagram depicts the state tourism growth aspirations in terms of source market contributions.



**To maximise the opportunities to increase expenditure for all of Queensland's destinations by 2020, the state tourism strategic direction is to;**

- Increase the share of international expenditure from 21% to 30% of overall visitor expenditure;
- Attracting more Asian travellers with the goal of increasing their share of international expenditure from 44% to 49%;
- Leverage marketing opportunities in specific long-haul markets of the United States, the United Kingdom and Europe;
- Attract visitors more resilient to economic shifts, such as the affluent over 50s and youth travellers; and
- Partner with Queensland's Regional Tourism Organisations (RTOs) to increase the visitation to Queensland destinations from New Zealand, intrastate and interstate markets.

In order to deliver on the vision and the targets for 2020, each RTO has led the development of a Destination Tourism Plan (DTP). These plans were developed in partnership with Local Government, State Government, Industry Associations, and Tourism and Events Queensland (TEQ) to set the direction for the future of tourism and events in each destination.

**At the core of the development of the Whitsunday Region DTP are the following key principles, including;**

1. An integrated approach to planning that seeks to deliver, improved destination competitiveness; increased visitor satisfaction; economic, social and environmental sustainability; effective partnerships and continuous improvement;
2. Recognition of megatrends identified in the 2013 CSIRO authored report, 'The Future of Tourism in Queensland – Megatrends, Creating Opportunities and Challenges Over the Coming Twenty Years'

### 3. Alignment with the six key themes that make up the vision for the Queensland tourism 20- year plan;

- Preserving our nature and culture;
- Offering iconic experiences;
- Targeting a balanced portfolio of markets
- Delivering quality, great service and innovation;
- Building strong partnerships; and
- Growing investment and access;

Importantly, this DTP recognises that regions and the state do not have the resources to undertake all desired projects. In the past resources have been spread too thinly and as a result many projects have not commenced, not reached their potential or failed in achieving desired goals/outcomes. With a view to better using available resources, this DTP identifies for the Whitsunday region a select number of key opportunities to pursue and challenges to overcome. In doing so consideration has been given to key areas such as;

- Is there a demonstrated market demand?
- Is there destination stakeholder support?
- Are identified target markets and segments key contributors towards the Whitsundays vision?
- Will strategies make a significant contribution to achieving the Whitsunday targets?
- Are strategies realistic (but aspirational)?

The DTP is a living document. In recognition of ever-changing environments and influences, it will be reviewed and upgraded {updated} on an ongoing basis. The involvement of a comprehensive range of stakeholders in the development and ongoing monitoring of the DTP, combined with the selection of a small number of strategies likely to best assist the region in meeting its goals, provides an agreed direction for the Whitsunday region to pursue with tourism and events development to 2024.

## ROLE OF TOURISM AND EVENTS IN OUR COMMUNITY

**'The region is home to 74 islands and is surrounded by one of the world's seven natural wonders, the Great Barrier Reef. The region contains substantial national parkland, providing a vital life support system for ancient rainforests and exotic wildlife. The local economy is driven by tourism, mining, sugarcane, farming and cattle grazing.'** (Source: Mackay-Whitsundays RDEC 2012 Economic Snapshot)

The Whitsunday regional population is approximately 35,500. The Airlie Beach-Shute Harbour- Cannonvale precinct (population approx. 10,000), along with the adjacent islands, is recognised as the region's key tourism precinct. Cannonvale continues to grow as a retiree and lifestyle residential location, and regional service centre.

Tourism accounts for an estimated 18% of the region's economy and 17% of the region's jobs. This ranks Whitsundays the 3rd highest region for the economic importance of tourism among the 77 tourism regions in Australia. (Source: Tourism Research Australia, 'The Economic Importance of Tourism in Australia's Regions'; published April 2011)

At the core of the Whitsundays brand and experiences are the regions pristine natural environments found in the Great Barrier Reef, island national parks and protected marine areas; and in mainland national parks, state forests and coastal precincts. A number of accommodation options varying from camping in a national park through to internationally branded luxury island resorts attract hundreds of thousands of visitors annually. With a tropical climate and easy access by road, air or sea, Airlie Beach and the Whitsunday Islands are a mature year-round destination.

The industry here offers world-class experiences; delivers best practice and innovation; embraces a partnership approach between the tourism industry, government and community and fosters thriving operators.

As such the Whitsunday region is continually raising the profile of Queensland's ecotourism experiences and contributing to the Queensland Ecotourism Plan 2013-2020 vision for 2020. That is by 2020, '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.'

Although over 40% of visitors access the region by air through the two main airports (Hamilton Island and Whitsunday Coast at Proserpine), over 50% of visitors access the region by road; with a vast majority of these being self-drive. Because of the

- Bruce Highway (national Highway One) passing through the region
- Importance of the grey nomad market
- Large fly-drive market
- Attraction of the region to the expanding population of the greater/surrounding region (spurred by resources industry growth over the past decade and the recent upsurge in this industry);

Drive-tourism is of huge importance to the region, to not only tourism businesses, but also in supporting a large number of other services, retail businesses and jobs. Drive-tourism presents numerous future economic growth opportunities for the Whitsunday region. Regional Queensland provides 45% of domestic overnight visitors and 31% of domestic room nights.

TW is the key tourism, business events/ conventions agency for the Whitsunday region. It is the RTO and has tri- party funding from Whitsunday Regional Council; Tourism and Events Queensland (state government) and Industry (memberships). TW has partnership arrangements with Tourism Bowen (Local Tourism Organisation), Proserpine Chamber of Commerce, Whitsunday Coast Chamber of Commerce and works across the region with business and communities in tourism development.

Whitsunday Regional Council is a key partner in tourism development, as evidenced in its Regional Economic Development Charter 2017 - 2021. The Strategy can be found on council's web site [www.whitsunday.qld.gov.au](http://www.whitsunday.qld.gov.au)

## Whitsunday Regional Council's Economic Development Charter

Whitsunday Regional Council works in collaboration with its partners in industry, government and the community, to secure a prosperous future that is driven by innovation and investment in strategic projects and industries that will drive regional growth.

It does this by:

1. Prioritising initiatives and activities that **support the growth and development of the Whitsunday Region's 'pillar' industries of agriculture, mining and tourism**, with an emphasis on new opportunities in value-added economic activities which target existing, new and emerging markets;
2. Promoting **a partnership approach to tourism promotion and development**, working in collaboration with tourism bodies and the tourism industry to enhance regional branding, marketing, product development, visitor servicing and support infrastructure;
3. Prioritising activities that **support local industry diversification** and the growth of 'knowledge-based' industry activities in agriculture, mining and manufacturing, in related service industries such as the technical and professional services and in the region's health care and education sectors;
4. Pro-actively **engaging with the Whitsunday Region's small to medium-sized business** communities to respond to shared issues and opportunities for local business growth and development; and
5. Pro-actively **promoting the Whitsunday Region to prospective investors**, using a strategic, informed and targeted approach consistent with the long-term vision for the region's economic development.

## ABOUT OUR DESTINATION

The Whitsundays tourism region aligns with the Whitsunday Regional Council boundaries. It is situated midway along the Queensland coast, approximately 1,100 km north of Brisbane and 700 km south of Cairns. The main population centres are Bowen on the north coast, Collinsville and Proserpine inland, and the Cannonvale-Airlie Beach-Shute Harbour precinct.



Historic development around Bowen is attributed to agriculture, fishing and development of Port Denison. Further south, Proserpine's existence is attributed to agriculture, processing of raw materials such as timber, and beef cattle and sugar milling. Settlement at Airlie Beach and surrounds has been a result of its position, as the gateway to the Whitsunday Islands and Great Barrier Reef. Development of Airlie Beach and the tourism sector has led to the expansion of Cannonvale as a residential and retailing service centre, housing and servicing needs of local workers. The larger communities in the subregion, such as Proserpine, Bowen, Airlie Beach, Cannonvale and Collinsville are all expected to grow significantly.

The subregion contains regional landscape and natural environmental values of national and international importance including the Whitsunday Islands, national parks, protected areas, riparian areas and sandy beaches that require protection for their ecological and scenic value.' (Source: Qld Dept. of Local Government and Planning, Mackay, Isaac and Whitsunday Regional Plan 2012)

Visitors usually come to the Whitsundays to experience the scenic tropical seas, beaches, reefs and islands of the region. Whether it be a guided or on-tour experience or just finding your own way, sailing, snorkelling, diving, visiting national parks, bush-walking and fishing are all popular activities; as are relaxing on the beach or at a resort, socialising or 'partying' at a bar, dining out and shopping.

World class tropical island resorts located in stunning settings offer a range of experiences targeting higher yield markets, e.g. health spa and beauty treatments; conference, incentives and events hosting; weddings and romance getaways; fine dining at top class restaurants.

The region is popular for annual sports and community events such as the Airlie Beach Race Week (sailing regatta); Schoolish Week; Airlie Beach Music Festival; Bowen Fishing Classic; Hamilton Island Race Week and growing events such as the Whitsunday Reef Festival, Airlie Beach Running Festival and Dirty Molle Island Escape (mountain biking event).

The Whitsunday Tourism brand is currently (May 2019) under review. The existing brand encompasses the following -

The tourism vision for the Whitsunday region is, 'By 2020 the Whitsundays will be globally recognised as one of the world's leading Tropical island and marine leisure holiday destinations'

The core brand promise is, 'Feel the wonder of Australia's island paradise'.

The following tables lists Whitsundays visitors 'Top 10 activities'

Domestic Visitors Top 10	YE June 2013	International Visitors Top 10	YE June 2013
Eat out at restaurants	74.8%	Go to the beach (incl. swimming, surfing, diving)	97.2%
Go to the beach (including swimming)	59.6%	Eat out / dine at a restaurant and/or cafe	94.5%
General sight seeing	44.8%	Sightseeing/looking around	94.5%
Go shopping (pleasure)	25.4%	Go shopping for pleasure	86.2%
Water activities or sports	23.5%	Visit national parks / State parks	80.1%
Visit friends and relatives	22.8%	Snorkelling	77.9%
Bushwalking or rainforest walks	21.6%	Pubs, clubs, discos etc	74.0%
Pubs clubs discos etc.	19.9%	Charter boat / cruise / ferry	73.5%
Visit national parks or State parks	17.1%	Go to markets	71.3%
Charter boat, cruise or ferry ride	15.9%	Bushwalking / rainforest walks	70.7%

(Source: International Visitor Survey (IVS) - Year Ended June 2008-2013, Tourism Research Australia and National Visitor Survey (NVS) - Year Ended June 2008-2013, Tourism Research Australia)

#### Whitsundays 'hero experiences' are;

**Diverse Island Paradise** - You'll be spoilt for choice in the Whitsundays 74 islands, from social to secluded, resorts to roughing it, active to indulgent. (Island resorts, camping, island national parks, day trips, walks and romance)

**Iconic Landscapes in the Heart of the Great Barrier Reef** - The silky white sands of world-famous Whitehaven Beach, the surprise of Heart Reef or any one of the stunning 74 islands; the magical beauty of the Whitsundays never leaves you once you've experienced this captivating part of the Great Barrier Reef. (Overnight boats, scenic flights to see iconic highlights, day trips, sailing, snorkelling and diving)

**Sailing, Flying, Snorkelling and Diving** - Whether you're sailing on it, diving in it, or flying over it, the islands and reef of the Whitsundays is a mesmerising visual feast. (Range of sailing options, reef tours and island hopping, dive tours and charters)

**Airlie Beach and Mainland** - Soak up the vibrant and social atmosphere of Airlie Beach, the gateway to the Whitsunday Islands, and be amazed by the contrasting colours of the surrounding landscape with its lush green rainforests and the vivid blue waters of the Great Barrier Reef. (Backpackers and youth, national parks, secluded beaches, day and overnight trips) (Source: Whitsundays Hero Experiences Fact Sheet)

#### Key competitive strengths of the region are its;

- 1. Icons** – e.g. Heart Reef; Whitehaven Beach; Great Barrier Reef (one of the 7 Natural Wonders of the World and World Heritage Listed); Whitsundays Islands National Park. It is the only place in the world where there is reef in such quality and quantity!
- 2. Un-spoilt environment** – other natural attractions (e.g. 74 islands - 66 not developed, pristine beaches, fringing reefs, Conway N.P.); clean potable water; clean air/lack of air pollution; clean seas
- 3. Safe environment** - safe/regulated food industry; low crime rates; political stability; safe/regulated passenger transport industry; etc.
- 4. Accessibility** – Two regional airports with Regular Passenger Transport (RPT) services; good road access (Bruce Highway; Greyhound Australia; local timetabled bus services; rental cars); Queensland Rail and year-round sea access (ports, marinas and safe mooring at islands and on the mainland);
- 5. Industry skills & experience** – mature industry; best practice focus; TW, WRC and TEQ knowledge, advocacy and support;
- 6. Diversity** – of product, accommodation; dining experiences; experiences; target markets; etc

## DESTINATION TOURISM PERCEPTIONS

**The Whitsundays is well known as a place that is fresh, healthy, warm, friendly, fun, welcoming, positive, easy going and adventurous. Consumers perceive they can go there to relax and leave the cares of the world behind. It is most commonly nominated the best place in Queensland to experience tropical islands and resorts, and premier sailing.'... 'While some consumers are willing to pay more to visit the Whitsundays, consumers often cite it as an expensive destination.'** (Source: *The Whitsundays Brand Health Check 2013; TEQ*)

It is often considered a place where young people come to party and access the islands/reefs (social fun-seekers); and families and couples come to share time, reconnect and enjoy beaches and marine activities (connectors). There is no doubt that the numerous marine and nature experiences (diving and snorkelling the reefs; sailing and kayaking the islands; the Conway National Park 'Whitsunday Great Walk') attract/appeal to the active explorer's market segment. And stylish travellers (e.g. some resort visitors) and un-winders (e.g. grey nomads who spend winter months in caravan parks at Bowen) are prevalent in the region.

From a resident's perspective, with approximately a quarter of jobs in the region being in the tourism industry and the Whitsundays lifestyle driving significant residential growth in Cannonvale over the past two decades, it is no surprise that there is great appreciation of and support for the tourism industry and its continued growth.

The following related information is sourced from the TEQ research publication, 'Whitsundays Social Indicators 2019'. Of those Whitsundays residents surveyed;

- 78% wanted more tourists (compared to 32% Qld wide) Only 2% wanted fewer tourists;
- 67% 'really like tourists' (compared to 50% Qld wide);
- 69% were happy with continued development growth (compared to 59% Qld wide). Note: 16% wanted growth in a different direction;
- 96% agreed that tourism provided greater cultural diversity (compared to 91% Qld wide);
- 92% agreed that tourism provided important economic benefits (compared to 89% Qld wide);
- 93% agreed that festivals and events attract tourists and raise awareness (compared to 89% Qld wide); and
- 39% thought tourism had a negative impact of local character (compared to 33% Qld wide)

## COMPETITOR ANALYSIS

In terms of destinations offering coastal or island holidays in tropical/subtropical climates; opportunities to dive and snorkel coral reefs; unspoilt environments; a place to escape your normal life and discover new experiences; a place to socialise and party; etc. the local industry identified the following competitors;

Key Direct Competitors	Other Direct Competitors
Cairns	Cruise Ships
Southern Great Barrier Reef	Maldives
Bali	Greek Islands
Fiji	Thailand
Vanuatu	

It was also recognised that other key tourism destinations (such as Brisbane/Gold Coast; Queenstown N.Z.; ski resorts) are competitors. Importantly there is also competition for expenditure of disposable income from outside the tourism industry, e.g. Harvey Norman, paying off the mortgage, a new car

**The Whitsundays competitive advantages from both an international and national standpoint include;**

- **The Great Barrier Reef** is one of the seven natural wonders of the world. It is World Heritage Listed and is the only place in the world where there is reef in such quality and quantity!
- **The regions 'pristine' natural environment.** Because of its clean environment and waters and excellent management practices over decades the Great Barrier Reef; islands; fringing reefs; and mainland parks and reserves offer great diversity of habitats and ecosystems; fauna and flora and a wealth of associated experiences. It boasts 74 islands of which 66 are not developed and more national parks and walking trails than many competitors.
- **Key icons** such as Heart Reef and Whitehaven Beach
- The Whitsundays is a year-round **sailing destination** and one of the best sailing grounds in the world, supported by international quality marina developments, ports that are accessible year-round and a calendar of events
- **Ease of access**, e.g. good road and self-drive access; two regional airports; ports; ferry, cruise and boat hire equals easy access around the mainland, islands and to the Great Barrier Reef
- **Value for money**, i.e. in terms of all the above and in consideration of the high-quality experiences and services on offer the Whitsundays offers great value for money.

In addition, it is also noted that from an international perspective there is a unique opportunity in comparison to other overseas destinations to highlight that the Whitsundays is a safe destination, i.e. safe in terms of a variety of factors, e.g. food, water, minimal crime, political stability, little infectious disease, regulated industries and services, reliable transport, excellent medical and emergency services.

From a domestic viewpoint competitive advantages include **strong brand recognition** amongst consumers.

## WHERE ARE WE NOW?

The region attracts visitors from a broad range of market segments including large numbers of international youth and adventure (backpackers) year-round, mainly from UK/Europe and North America. The region is a year-round destination for the domestic market, particularly eastern seaboard connectors, social fun-seekers and stylish travellers visiting on a fly-drive holiday; and couples and families from the surrounding region (which has grown considerably in the past decade with the resources boom). Corporate business and incentive events; special events and romance/weddings are additional target segments that bring visitors in significant numbers to the region. Visitor numbers do decline during the peak of the summer wet season.

Bowen is an extremely popular destination with the grey nomad market (unwinders and social fun-seekers) and families from May-October with boating, fishing, swimming and relaxing at a caravan park being popular beach side activities. Bowen also attracts 1,000 – 1,500 backpackers on working holidays from May-December annually to work in the fruit, horticulture and sugar industries. Proserpine is located inland on the Bruce Highway and attracts a combination of self-drive travellers taking a rest or short break; recreational fishers fishing for Barramundi at Peter Faust Dam and day-trippers from the main Airlie Beach tourist precinct 40km away. Collinsville is largely a coal mining town. Located 80 km inland from Bowen it traditionally attracts visitors to local events, the VFR market and self-drive tourists exploring alternative routes to destinations.

Like many Australian regions, the Whitsundays tourism industry has had some tough times over the past decade. Economic conditions in Europe and UK over recent years resulted in a significant reduction in the numbers of UK/European backpackers coming to Australia and to the region. Many domestic tourists took advantage of the cheap international travel and headed overseas rather than holidaying at home. Tropical cyclones, in particular Cyclone Debbie in 2017 and the negative impacts of the Townsville floods in 2019 resulted in fewer visitors coming to the region.

Whilst a majority of operators successfully traded through these tough times, some resorts and businesses did close. A number of island and Airlie Beach properties are reopening in mid-2019 after repairing cyclone damage and reinvigorating their product offers.

### **For the year ending December 2018;**

- There were 884,000 overnight visitors to the Whitsundays spending a total of \$956M
- Of these 234,000 were international visitors (down 1.1%)
- Expenditure was \$211m (up 12.5%)
- U.S.A. and France increased visitor numbers while U.K., Germany and China were down
- who spent an average 5.5 nights each in the region (up 0.4 nights)?
- spend per night of \$163 (up 6.5%)
- Domestic visitation increased to a record 651,000 visitors (up 11.8%)
- Expenditure was \$745m (up 15.2%)
- Spend per night of \$249 (steady)
- There were 398,000 intrastate visitors who stayed an average 3.36 nights in the region
- There were 252,000 interstate visitors who stayed an average 6.23 nights in the region

### Top International Source Markets 2018

	visitors	Change 2017/18
1 United Kingdom	47,000	-7.8%
2 Germany	30,000	-16.9%
3 USA	20,000	20.5%
4 China	18,000	-21.0%
5 France	14,000	19.9%
6 Scandinavia	13,000	2.4%
7 New Zealand	11,000	
8 Canada	9,000	2.7%
9 Switzerland	8,000	-4.6%
10 Netherlands	8,000	9.5%

**Whitsundays current target markets are;**

### Domestic Target Markets

#### TARGET MARKET

##### Romance

#### DESCRIPTION

Primarily domestic (organic overlap into NZ and some international). This segment includes; honeymoons, babymoons, engagement trips, weddings, anniversaries and romantic getaways.

This market always travels with a significant other, and sometimes includes friends and family.

We suspect that this market is unaware of what the overarching Whitsunday region experience is and is more familiar with specific experiences offered by Hamilton, Hayman and Daydream. There is a perception that safety is a barrier (sharks, stingers, cyclones, etc.). We also believe that the proximity/ease of access for a short break is a barrier. In reality, we are more accessible than competitors (Fiji, Vanuatu, Bali) because of language, customs/immigration, travel time, health factors (water/food), etc.

#### CHALLENGE/OPPORTUNITY

Educate this market about the value proposition that the Whitsunday region really offers relevant to their needs (correcting awareness) and accessibility around proximity and safety (consideration). e.g. online content like Iceland's educational videos and online quiz (Do you really know the Whitsundays to capture data through contesting). Also, an opportunity to create a 'how to do the Whitsundays' tool.

#### TARGET MARKET

##### Big life events

#### DESCRIPTION

This segment is celebrating milestone birthdays, hens/bucks, retirements, promotions, graduations, etc. This is distinct from romantic travel (above). This market will likely travel for a long weekend (3 nights), and travel in groups of friends/family.

For this market there is a mix of being interested in a big splash, not worrying about the budget and those who are concerned over price. The target market may feel as if it is out of their price range, as their perceptions are limited to the islands and do not incorporate the remainder of the region and sailing opportunities.

We suspect that this market is unaware of what the overarching Whitsunday region experience is and is more familiar with specific experiences offered by Hamilton, Hayman and Daydream. There is a perception that safety is a barrier (sharks, stingers, cyclones, etc.). We also believe that the proximity/ease of access for a short break is a barrier. In reality, we are more accessible than competitors (Fiji, Vanuatu, Bali) because of language, customs/immigration, travel time, health factors (water/food), etc.

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e.g. online content like Iceland's educational videos and online quiz (Do you really know the Whitsundays to capture data through contesting). Also, an opportunity to create a 'how to do the Whitsundays' tool.

#### **TARGET MARKET**

##### **DINKs**

#### **DESCRIPTION**

Location matters less.

Primarily high net worth couples in major cities in Australia or NZ. Internationally, this market may be 'grown up backpackers' who are naturally adventure-focused traveller and may have visited the Whitsundays before (aligning to TA's market segment: Experience Seekers). This audience is not highly price sensitive and is instead looking for unique experiences.

We suspect that this market is unaware of what the overarching Whitsunday region experience and is more familiar with specific experiences offered by Hamilton, Hayman and Daydream. There is a perception that safety is a barrier (sharks, stingers, cyclones, etc.). We also believe that the proximity/ease of access for a short break is a barrier. In reality, we are more accessible than competitors (Fiji, Vanuatu, Bali) because of language, customs/immigration, travel time, health factors (water/food), etc.

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#### **TARGET MARKET**

##### **Aussie families**

#### **DESCRIPTION**

High net worth families taking a holiday, typically during school breaks. Often they come because of a package deal on one of our islands. They may be unaware of the sailing experience or think it is unsafe with kids. This market is focused on major East coast capital cities:

- Brisbane/GC/SC (often Daydream)
- Melbourne (often Hayman)
- Sydney (often Hamilton)

A major challenge is the perception of cost. There is little awareness or consideration. There is a dominant legacy behaviour skewed towards competitive destinations (e.g. Gold Coast).

#### **CHALLENGE/OPPORTUNITY**

TBD - needs discussion.

May be overlap with other segments (e.g. organic impact from DINK & international activity. May also need to be repeat, if they came for romance/life event). Perhaps we target past visitors. This would require a data-capture

tactic in year 1 (e.g. campaign that industry can run to past visitors such as an online knowledge competition that only past visitors could do well on). Going forward there is an opportunity to instill a program to capture traveller data (email/social connections).

NOTE: Many of the back-of-napkin assumptions we have made about target markets should be researched and validated over time.

## International Target Markets

### TARGET MARKET

#### Backpacker

#### DESCRIPTION

Primarily originating in the UK and Germany but overlap into other international markets. UK travellers often drink and party in Airlie Beach and participate in group sailing experiences. Whitsunday region is typically just one of many stops on a self-drive Australian trip. The German market is more likely to be driven by GBR and aligned with environmental conservation.

This could be individual travel or small groups of friends.

Influencing this market is Tourism Australia's and TEQ's role (we do not have resources to do this effectively).

We suspect that in recent years, backpackers are treating Australia as one part of a South Pacific trip (incl. NZ) and not coming to the Whitsunday region as often. This challenge is amplified by the ease of obtaining visas in other markets.

This market is a valuable market segment and has a high lifetime value because they can be advocates and return as visitors in another market segment. Word-of-mouth is a very important influence in this segment.

We are concerned that our product may not be meeting market expectations in this segment.

12% (118,527 in 2018) of backpackers who come to Australia come to the Whitsundays. This number declined 6% from the previous year.

#### CHALLENGE/OPPORTUNITY

We need to make sure that every backpacker who comes to Australia:

- Comes to the Whitsundays as part of the trip
- Has the 'full' experience (i.e. 7 days, not 2 nights)

The opportunity is to target backpackers after they have booked a trip to Australia (in the intent/planning phase). ex 1) on OTA confirmation page. This is important for in-market activities in Germany for backpackers it should be focused on the period after the backpacker has already made the decision to come to Australia (after they have booked a trip).

ex 2) after they have landed in Australia through a co-op (digital and in-agency) campaign with trade partners in key gateways (such as Sydney) who are selling 5 nights of Whitsundays in their tours.

Identify and collaborate specifically with trade partners that are passionate/loyal and knowledgeable about the Whitsunday region experience.

Our goal is that a high % of backpackers coming to Australia visit the Whitsunday region properly.

### TARGET MARKET

#### International

#### DESCRIPTION

Our assumption for planning is that the Whitsunday region is not the key motivator for the trip, but the GBR is a key part of an Australia trip (e.g. Sydney + Reef). The primary challenge for this market is shifting from intent

to booking an Australia trip. We cannot really afford to influence this at scale. We need to make sure that the Whitsunday region experience (including the best place to experience GBR) is a primary feature on everyone's dream Australian itinerary.

GBR is key aspect to positioning. Sailing is the hero experience to inspire travellers, even if they actually experience in other ways.

Typically, the following geographic markets are priority:

- UK
- Germany - environmentally focused
- US - luxury and the experience
- China - experience (especially for the photo)

German visitors are ideal & aligned to our values.

### **CHALLENGE/OPPORTUNITY**

There's two ways to impact these visitors:

1. Based on interest (diving/snorkelling due to having the reef, sailing the Whitsundays as a bucket list experience and bucket-list adventure travel). Tactics may include either worldstage PR (Condé Nast, Nat Geo) or extremely focused digital marketing based on interest-targeting. There will be a natural overlap from this brand-level activity into other domestic markets (especially DINKs).
2. The instant they have booked an Australian trip, the ideal tactic would include advertising through OTAs and Airlines. Our German trade rep should be focused on niche publications and niche trade shows (rather than broad travel), based on interests (diving/snorkelling, sailing, adventure travel).

Note: we have not specifically differentiated LGBTQ as a market, because they fall within all of our target markets.

### **Secondary Markets** (requiring no or low investment levels at this stage)

#### **TARGET MARKET**

##### **Grey nomad**

#### **TRAVELLER BEHAVIOUR**

1 to 60 nights

Explore the entire region

Opportunity for free camping in Collinsville

Focus is to talk to this audience from May-Oct, during the cooler months.

#### **CHALLENGE/OPPORTUNITY**

Get people to turn off the highway, e.g. using really effective creative on the billboards. There is an opportunity here for Collinsville leveraging 'free camping'.

#### **TARGET MARKET**

##### **Grown-up backpackers**

#### **TRAVELLER BEHAVIOUR**

Likely included in DINKs and International

#### **TARGET MARKET**

##### **Regional drive**

#### **TRAVELLER BEHAVIOUR**

Typically looking for discount holiday or mining industry workers guys who are cashed up and a bit more flashy.

Events are a driver of travel.

Last-minute booking is typically.

Opportunity to fill wet season.

A priority market in the low season.

#### **CHALLENGE/OPPORTUNITY**

We need to communicate reasons to visit (especially during the wet-season).

Example: social ads/posts, targeted to near-in market, showing reasons to visit: weather, fish caught today, waterfalls when it rains, events, etc. Same tactic would work on local radio or Thursday local news spot.

#### **TARGET MARKET**

**Fishing (fits into others)**

#### **TRAVELLER BEHAVIOUR**

Proserpine is known as the mecca for Barra in Australia

#### **CHALLENGE/OPPORTUNITY**

Feature in content plan.

#### **TARGET MARKET**

**Business Events**

#### **TRAVELLER BEHAVIOUR**

Not a focus its an output of other activity. Play at a brand-level to build reputation.

Generate leads for industry.

#### **CHALLENGE/OPPORTUNITY**

Build web page for lead-gen. Feature case-studies from past event organisers that represent ideal events. Small amount of content to highlight strengths as meeting destination.

#### **TARGET MARKET**

**Endurance events**

#### **TRAVELLER BEHAVIOUR**

Highlight events to relevant target markets (e.g. hero broadly through Australia using targeted digital and smaller events to regional visitors).

#### **CHALLENGE/OPPORTUNITY**

Social and content plan.

#### **TARGET MARKET**

**Cruise**

#### **TRAVELLER BEHAVIOUR**

This is an opportunity for data capture to encourage repeat visitation.

#### **CHALLENGE/OPPORTUNITY**

Greeter program.

## WHERE WILL WE BE IN 2025?

### Our Vision

To showcase the Whitsundays as the globally recognised Great Barrier Reef destination.

### Our Mission

We promote the destination globally to increase visitation, dispersal, expenditure and length of stay; driving the economic benefit and sustainability of the tourism industry through marketing and industry development.

#### Key drivers include:

- Better access into Whitsunday Coast and Hamilton Island Airports
- More resorts/hotels (including a full service internationally branded hotel at Airlie Beach);
- Increased numbers of events creating a full annual calendar.
- Improved access to attractions and products (more tour operations and attractions etc.);
- Growth in cooperative marketing and packaging by local operators in partnership with EQ; and
- Increased infrastructure to support tourism growth.

#### Other key drivers identified in the process include:

- Significantly more higher yield visitors;
- More short intense visits (higher yield and crammed with experiences);
- Improved services, social infrastructure and more retail diversity (more shopping centres, education and health facilities, entertainment and leisure facilities supporting a growing resident population and tourism industry);
- Better customer service and increased employment of local residents in tourism;
- Growth in cooperative packaging and marketing initiatives by local operators;
- Increased product/attractions for youth and families;
- Growth in delivery of experiences;
- Increased regional and VFR visitors;
- New as well as refurbished island resorts;

#### Whitsunday Key Performance Statistics since the 2014 DTP including 2020 targets

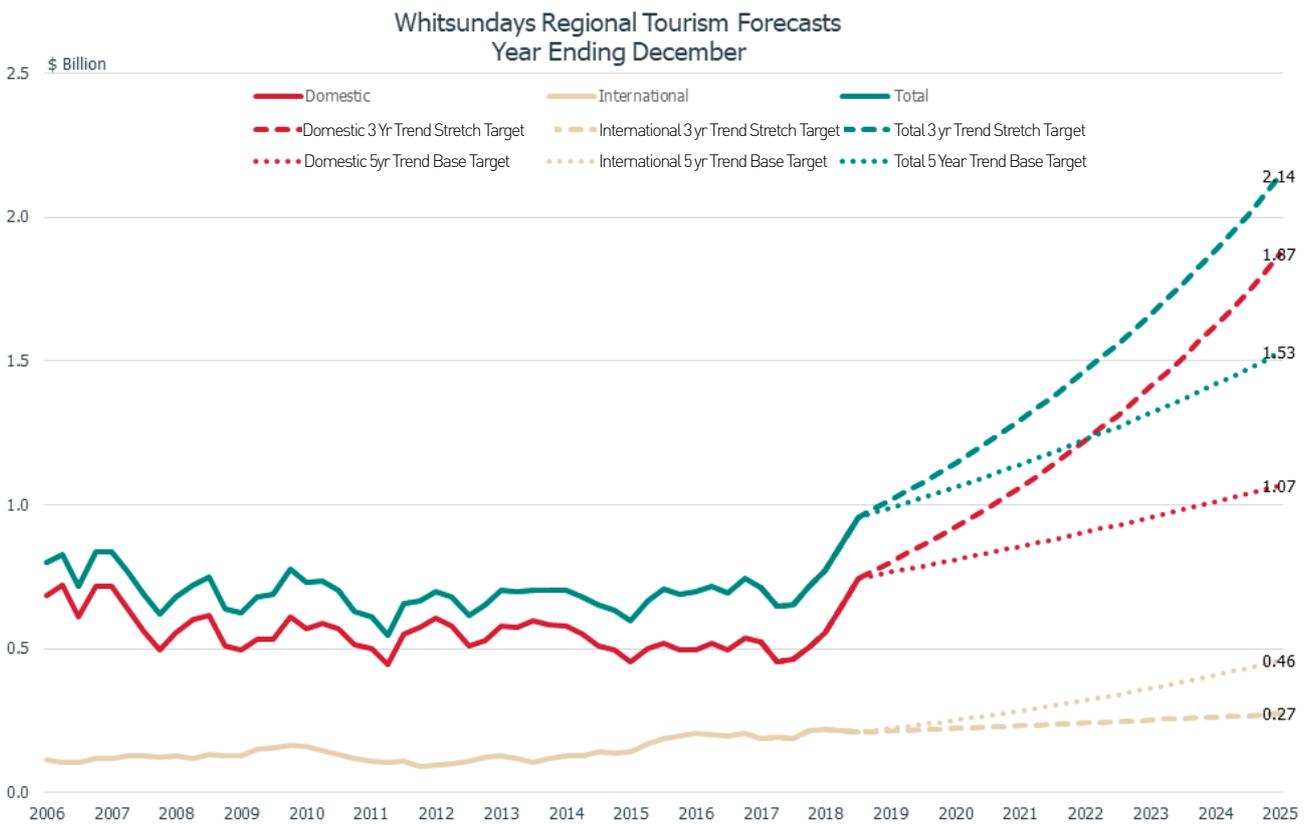
	Target			Target			Target			Target			Target		
Year ending	2013	2018	2020	2013	2018	2020	2013	2018	2020	2013	2018	2020	2013	2018	2020
Source of visitors	Visitors 000			Average stay			Room nights 000			Average daily spend			Contribution to annual visitor expenditure \$M		
Domestic Queensland	279	398	340	3.36	3.36	4.0	938	1,401	1,360	\$269*	\$249*	\$333*	\$253	\$745	\$453
Domestic Interstate	193	252	240	6.23	6.23	6.9	1,203	1,595	1,656	\$269*	\$249*	\$333*	\$342		\$561
International	181	234	210	7.12	5.5	7.5	1,289	1,294	1,575	\$99	\$163	\$145	\$128	\$221	\$228
Subtotal	653	884	790				3,430	4,290	4,591				\$705	\$956	\$1,233
Domestic day trips	249	TBA	300										\$32	TBA	\$51
Total	902		1,090				3,430	4,290	4,591	\$130**		\$170**	\$737	\$956	\$1,284

\*Note, there is no analysis or break up in statistics provided to differentiate the daily spend between intrastate and interstate visitors so the same figure per night has been used in this table.

\*\*Assumptions from the 2014 DTP, no domestic day trip numbers were available at the time of compilation of this table

Considering the effects of Cyclone Debbie in 2017 the Whitsundays has done very well towards reaching the 2020 targets. Visitor numbers exceeded the 2020 targets in 2018 but visitor nights and expenditure need to rise to meet the 2020 targets. Areas of concern are length of stay across all markets, this may have been affected by the cyclone and systemic changes in the international youth market that have affected by Brexit, changes in gap year behaviour and less working holiday makers in the region. The other concern is average nightly expenditure which has not changed for domestic visitors between 2013 and 2018, this may have been affected by a number of the higher priced island accommodation being closed in 2018 due to Cyclone Debbie.

## Growth Targets to 2025



## MEGATRENDS

*The Future of Tourism in Queensland – Megatrends, Creating Opportunities and Challenges over the Coming Twenty Years*, CSIRO 2013 report identifies a series of megatrends that will impact on the Whitsundays over the next decade, in particular;

**The Orient Express** – Although Asian tourists haven't made up a big proportion of visitors to the Whitsundays it is changing and being located in Queensland with easy air access from China, India and S.E. Asia provides numerous opportunities for our industry/operators to take advantage of a growing Asian middle class (their capacity and desire to travel) providing we can provide an aspirational destination and offer value- for-money.

**A Natural Advantage** – This emerges as both the greatest opportunity and biggest concern for the Whitsundays tourism industry. The regions industry is based on the relatively pristine marine environment of the Great Barrier Reef (GBR), Whitsundays Islands and fringe reefs; island and mainland national parks, protected areas, coastal precincts, beaches and other reserves. Pristine marine environments, fauna and flora diversity and sustainable ecosystems are at the heart of the Whitsundays product offering. With the current focus of our society on economic development and population growth this raises some challenges for the Whitsundays.

It is reported that there has been a loss of fringing reefs/corals and that the reef (GBR) has already lost a proportion of its coral cover (for various reasons). However, if the region/industry and partners are able to halt the degradation of the natural environment, this places the Whitsundays in an enviable position in a global environment where biodiversity and natural habitats are disappearing at alarming rates.

**Great Expectations** – The bulk of the attraction of the Whitsundays as a destination, is centred on opportunities to interact with the natural environment, an appreciation of the unique experiences on offer (aspirational destination) and socialising. It is already a genuinely authentic destination and the key is to not lose this.

**Bolts from the Blue** –As a coastal tropical destination the region is already well accustomed to dealing with the unpredictable effects of adverse weather conditions, such as cyclones and associated storm surges (flooding from heavy rain events and sea level rises/high tide surge events). Forecasts are that ongoing climate change will result in increased intensity of such natural events. The region needs to identify how to turn these predicted natural events/ disturbances to our advantage.

Although exchange rates are now more favourable, the region knows what impact a high \$A has in deterring international visitors and a rising \$A is always a possibility in the fluctuating fortunes of world economies. The domestic visitor is and will remain crucial to the Whitsundays tourism industry.

**Digital Whispers** – The region has a mature tourism industry. Many operators and businesses are well versed and have extensive experience in utilising the digital world to their advantage. Yet many need to better leverage opportunities presented by related TW and TEQ key destination assets. It will always be an ongoing challenge in the digital age to ensure all businesses, from micro-businesses to large corporations, are taking full advantage of the opportunities available within and ability to manage the online world.

**On the Move** – The region is well aware of growth opportunities associated with its clean food produce (agriculture, horticulture, aquaculture, fishing industries). The Region's appeal will grow as a business, events, conferences, romance and weddings destination.

**The Lucky Country** – Although Australia has weathered the world economy comparatively well, the region recognises its limitations in terms of high labour costs and other input costs. Our focus is in delivering value for money experiences rather than lowest cost.

## QUEENSLAND ECOTOURISM PLAN 2013-2020

Many Whitsundays experiences are based on pristine natural environments (marine and terrestrial); discovering Australia (nature, people, culture); and enjoying healthy lifestyle outdoor activities. There is strong alignment between the direction the Whitsundays region wishes to take in growing the tourism industry and the Queensland Ecotourism Plan 2013-2020, e.g. we share the vision for Queensland to be, '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.'

- The Whitsundays Islands and Great Barrier Reef already have recognition as world-class beauty and natural environments. The region has numerous eco-tourism accredited businesses providing world-class nature-based activities and experiences. To grow sustainable eco-tourism the Whitsunday Region can:
- Advocate for development control and government decision making to ensure that the regions natural environments and eco-systems are protected;
- Develop opportunities to engage visitors in experiencing the regions parks, reserves, marine environments, etc. with a particular focus on new or refreshed events, products and infrastructure that;
- Realigns existing experiences to remain relevant to traditional markets and engages new markets. Grow the number of overnight and day-trip visitors wanting to participate in nature-based activities
- Capitalise on the increasing number of visitors seeking active engagement and improved wellbeing from their holidays
- The desire to develop a Whitsundays Airlie Beach Marine Discovery Centre, a facility providing excellence in interpretation – drawing on science, research and storytelling to provide visitors with an enriching experience. The expansion of the Living reef display at the re-built Daydream Island might fulfil that experience.

## QUEENSLAND DRIVE TOURISM STRATEGY 2013-2020

The drive market will be increasingly important to the Whitsundays because of population growth in the surrounding regions leading to increased day- trip, short-break and VFR visitors. *The Queensland Drive Tourism Strategy 2013–2015* (December 2012) identifies a number of opportunities the Whitsundays can take advantage of:

- Cheaper air fares and new airline routes have led to an increase in numbers of fly-drive visitors. This trend is likely to continue;
- Growing popularity in the past decade of modern well-equipped RVs has helped drive an increase in the number of visitors taking a Queensland drive holiday in a self-contained RV; and
- The Australian Bureau of Statistics predicts by 2050 the number of Australians aged 55 years and over will more than double. These grey nomads spend similar amounts of money as younger visitors but, 'grey nomads spend a greater number of nights per annum driving and staying within regions and often in areas not frequented by other visitors. In addition, these are the touring public who often travel in off-peak periods, therefore levelling regional tourism capacity throughout the year.'

### **Challenges to overcome include;**

- Facilitating local solutions to provide short- term overnight camping sites for the increasing numbers of RV and caravanners seeking low- cost or free sites. Collinsville has an existing free rest area but is looking to develop an additional camp site near the Burdekin Dam. Proserpine community has expressed interest in developing a new camping site to encourage drive tourists to stay and contribute to the local economy. Bowen stakeholders oppose free camping, believing it will take business from existing caravan parks;
- Development and marketing of local tourist drives, e.g. that highlight historical, heritage, cultural, community, economic, environment, scenic points of interest; provide rest, refreshment and local shopping opportunities; are informative, appealing and safe.
- Signage issues negatively affecting driver safety, way-finding and the visual amenity of the area/ region, including old or faded signage; signage clutter in some areas; and the proliferation of roadside advertising.

The Whitsunday Regional Council plays a significant role in tourism in the Whitsundays. It is a tourism operator in its own right, facilitator and promoter of economic development, part funder of Tourism Whitsundays and provider of infrastructure without which tourism would not operate.

They developed a Whitsunday Region Economic Development Strategy 2017-21 which has a strong focus on tourism. The Strategy can be found on council's web site [www.whitsunday.qld.gov.au](http://www.whitsunday.qld.gov.au).

### **Whitsunday Regional Council's Economic Development Charter**

Whitsunday Regional Council works in collaboration with its partners in industry, government and the community, to secure a prosperous future that is driven by innovation and investment in strategic projects and industries that will drive regional growth.

It does this by:

Prioritising initiatives and activities that **support the growth and development of the Whitsunday Region's 'pillar' industries of agriculture, mining and tourism**, with an emphasis on new opportunities in value-added economic activities which target existing, new and emerging markets;

Promoting a **partnership approach to tourism promotion and development**, working in collaboration with tourism bodies and the tourism industry to enhance regional branding, marketing, product development, visitor servicing and support infrastructure;

Pro-actively **engaging with the Whitsunday Region's small to medium-sized business** communities to respond to shared issues and opportunities for local business growth and development; and

Pro-actively **promoting the Whitsunday Region to prospective investors**, using a strategic, informed and targeted approach consistent with the long-term vision for the region's economic development.

## GROWTH IMPLICATIONS

There are growth implications if the Whitsunday region is to achieve its goals;

**Accommodation** – 'A 55% occupancy rate is forecast for 2020 by the TFC, while the industry potential indicates a 70% occupancy rate will be observed. Therefore, existing hotel infrastructure appears to be readily sufficient to meet future increases in visitor nights.' (Source: Deloitte Access Economics report Queensland Tourism - Industry Outlook and Potential to 2020 for the Qld Department of Tourism, Major Events, Small Business and Commonwealth Games - August 2012).

However, a number of local industry leaders have identified the need for a full-service brand- named hotel at Airlie Beach, on the basis that it:

- Will provide additional 4 1/2 to 5-star plus accommodation required to attract business conventions and conferences, and higher yield domestic and international markets;
- Will deliver additional marketing resources and international promotion for the Whitsundays, which (it is assumed) would come from a brand chain promoting its brand and hotel at Airlie Beach; and
- May be incorporated into a multi-function precinct that could include convention, hotel, entertainment and retail/dining facilities.

Others in the industry have called for a wider study looking at the needs for all types of accommodation in the region.

**Access** – There is generally good road, rail and air access into the region. However, issues that do impact on businesses include:

- A lack of 'reasonably priced' air fares during peak periods, e.g. Easter, Christmas – New Year, and school holidays. The issue is that although visitors may be able to fly into and out of the region in peak periods, they will be paying top dollar, which restricts businesses from providing competitive packages during these times. And this adds to problems the region has in addressing perceptions that the destination is overly expensive (not competitive in 'value for money' terms);
- Annual wet-season: flooding of the Bruce Highway (Highway One) and road link from Proserpine to the key tourist precinct of Airlie Beach. Disruptions to road links into and within the region are accepted as, 'something one deals with', in a tropical climate (wet seasons and cyclones). However, it needs to be noted that a number of visitors access the key tourist precinct of Airlie Beach (access point to the Whitsundays Islands and Great Barrier Reef) by road. This is either as self-drive; fly-drive after arriving at Proserpine (Whitsunday Coast) Airport; or from coach/bus services along the Bruce Highway. Usually flooded roads water levels rise and fall in relatively short periods (so the impact is perhaps considered by Dept. of Transport and Main Roads as not as intense as in other areas of tropical Qld)

**Attractions** – local stakeholders have identified a need for more attractions/options for when the weather turns foul and for youth and families. Projects that have been on the books for a number of years include a Wave Park (artificial surf park), Cable car and a Marine Discovery Centre at Airlie Beach would address part of this need as would the planned cinema and bowling alley in Proserpine.

Project consultation identified that further events development (preferably centred on local culture, leisure and healthy-lifestyles) is essential in growing tourism and to provide increased opportunities for visitors to engage with local communities/culture. The success of recent new Whitsundays events such as the Airlie Beach Music Festival and The Dirty Molle Island Escape (Mountain Biking) are presented as examples to follow.

The need to provide improved opportunities to distribute Airlie and Island visitors about the remainder of the district (as a strategy to increase lengths of stay and boost local economies) is a high priority. The development of self-drive routes; a Proserpine heritage or shopping trail; Bowen food trail or markets are seen as 'low hanging fruit' opportunities (relatively easy opportunities to bring to fruition).

## TOP OPPORTUNITIES AND CHALLENGES

With the industry and local stakeholders extensively consulted in the past 24 months the consultation process to identify the Whitsundays region top opportunities and challenges is explained in the following graphic.

The top opportunities and challenges the region faces are identified as;

### **Top Opportunities**

- New and reinvigorated high value product
- Optimise the regions marketing outcomes particularly in the international market
- Product and experience development
- Events development
- Developing drive tourism
- Working together as a team

### **Top Challenges**

- Threats to and decline in the marine and natural environment
- Access
- High cost of doing business in Australia
- Impacts of severe weather events
- Lack of mainland product and activities
- Attracting, developing and retaining a skilled workforce

## DESTINATION STRATEGIES

### 1. One Whitsundays

The Whitsunday region has a small population and business base that delivers well above its size. Tourism provides approximately 40% of jobs which is the highest in Queensland and amongst the highest in Australia. There has been a tendency in the past for the region to be split on geographical and sectoral lines, this has improved since Cyclone Debbie and this change needs to be supported and nurtured. It is important that each organisation that is involved in promoting and developing tourism and events works cooperatively. It is essential that key organisations such as the Whitsunday Regional Council and Tourism Whitsundays develop a Partnership document that outlines roles and responsibilities so there is no duplication of effort and issues don't fall between the cracks. The industry needs to 'hunt as a pack', to support each other and work cooperatively for the benefit of the Whitsundays.

#### Strategy

WRC and TW to create and implement a series of workshops across the whole region to showcase and explain the new brand and the key attributes and the guidelines on how they can be used by the whole Whitsundays region

These workshops and follow-up communication will encourage and educate the whole of the Whitsundays regional tourism and business community to collectively promote and market the region under the One Whitsundays brand, recognised both nationally and internationally as an iconic Australian leisure destination.

TW and WRC develop a Partnership document outlining roles and responsibilities.

TW review funding options for TW

### 2. Access

Year-round affordable access is essential to the Whitsunday region. Mode of transport is split evenly between air and land with airports at Proserpine (Whitsunday Coast) and Hamilton Island. Focus has come off direct international flights into the region to concentrating on building frequency on existing domestic routes, increasing the number of direct routes and providing easy connections for international visitors over international gateways. That strategy provides an attractive range of services for domestic passengers boosted by international connectors concentrating numbers and giving airlines sustainability to continue to grow flights. Tourism Whitsundays needs to work cooperatively with airlines, airports, TEQ and the tourism industry to support flights particularly in low seasons and to attract new services.

Road access is important to the regional and touring market. Visitors do not want to face the prospect of being flooded in during periods of bad weather. Roads, in particular Shute Harbour Road, Hamilton Plains and the Bruce Highway, Goorganga Plains flood and make access between Airlie Beach, Proserpine, Proserpine Airport and the Bruce Highway impossible. The main responsibility lies with The Australian and Queensland Governments and while plans have been made to upgrade roads there is no definite time set down for the work.

#### Strategy

Attract and support increased and sustainable aviation access to the Whitsundays from priority domestic markets that have exceptional strategic value for the Whitsundays. This includes key international Australian gateways which provide direct connectivity to the two local airports in Proserpine and Hamilton Island from key source international markets.

Whitsundays, as a destination, to develop a partnership approach to airlines to establish new and sustain existing air services to overcome the somewhat seasonal and more niche perception of the Whitsundays. This partnership approach must align with aviation and tourism industry to include targeted marketing, promotional and trade initiatives to optimise any new and existing flights to the Whitsundays.

"Tourism and Events Queensland's Aviation Framework 2018-2025 (the Framework) informs decision making in Queensland's negotiations with airlines and airports on new air services and route

development and provide a reference point for Tourism and Events Queensland's (TEQ) international and domestic market priorities. The market priorities and route considerations outlined in the Framework will also guide assessments of applications to the aviation route development programs. The Framework supports the implementation of TEQ's 2025 market strategies (Western, Asian and Australia). The Framework has been developed based on third party analysis and insights and is a key deliverable for TEQ under the Queensland Government's Advancing Tourism 2016-20 Strategy."

WRC to continue to work with key State and Federal agencies to establish current priorities and timelines for the implementation of essential seasonal road access across the region as identified in previous DTP. The Whitsunday Region's identified road infrastructure priorities include: access to the Whitsunday Coast Airport; and building disaster resilience for the region's road network, particularly in light of the impacts of Cyclone Debbie in March 2017. For State and Federal-controlled road infrastructure priorities, Whitsunday Regional Council has a role in advocacy and providing collaborative support where it can.

### 3. Product Development

Industry continues to identify the need for more mainland attractions, activities and tours. The challenge is to make those profitable, anecdotally the region has lost products over the past ten years due to lack of year-round support. Despite many projects being identified in the last DTP most of those have not been built. Industry needs to promote and sell the tours and attractions. Tourism Whitsundays needs to develop and distribute digital and paper-based maps disbursing visitors around the region promoting both new and existing attractions, tours and activities.

Whitsunday Regional Council has developed feasibility studies for Flagstaff Hill Conference and Cultural Centre at Bowen and Lake Proserpine Barramundi Fishing and Interactive Nature Recreational Precinct and has received grants to expedite these projects. They are also planning a Marine Centre of Excellence in Bowen and are restoring Shute Harbour following damage from Cyclone Debbie.

A Bowen business organisation is building a business case for a Catalina Flying Boat display commemorating Bowen's strategic role as a sea plane base in World War 2.

Rebuilding of structures damaged by Cyclone Debbie has brought forward planned improvements on several properties. Hamilton Island is fully operational, Daydream Island has just opened and Hayman Island is due to re-open mid 2019 and South Molle Island has been sold for redevelopment. The owners of Lindeman Island have announced redevelopment plans. That still leaves Long Island Resort, Hook Island Resort, and Laguna Quays without firm redevelopment plans. Note Lindeman and Laguna are technically in the Mackay Regional Council area but have been serviced and marketed as part of the Whitsundays in the past.

The last DTP identified a need for a five-star branded hotel and entertainment precinct at Airlie Beach. The Whitsunday Regional Council's Economic Development Strategy contains an action to complete planning and development approvals process necessary for this under the Airlie Beach Foreshore Masterplan. During consultation for this DTP industry felt there was a need to develop a Tourist Accommodation Strategy which would identify the need for additional accommodation by type in the area.

#### Strategy

TW and WRC to review and identify new visitor experiences and developments priorities and opportunities identified in the Whitsundays Regional Plan.

The following have been identified as key projects which are supported by the Whitsundays tourism industry.

- A fully integrated brand name resort development. The suggested concept is an International Hotel-Convention Centre-Retail & Dining precinct. Such a development would attract new high-yield markets and international publicity for the region.

- A community, entertainment and events centre. It is reported that once numbers are 260-300 then the only venue in the Airlie Beach–Islands region capable of conference hosting is Hamilton Island (which already has significant year-round business). It has been suggested that a multi-purpose convention centre at Airlie Beach is needed to host large events and provide an undercover venue during inclement weather. Anecdotal evidence suggests this will present an opportunity to boost mid-week occupancy rates, i.e. by hosting Australian (national/regional business meetings/events. Such a venue should be located within walking distance of most Airlie Beach accommodation and should have plenty of break-out rooms/facilities, large plenary theatre with tiered seating, dining room, exhibition spaces, etc. and be capable of hosting over 500 delegates. Such a facility could be multipurpose, including car parking, a cinema and dining outlets. The idea requires concept and feasibility planning.
- Opportunities for recreational fishing and major fishing competitions based around the developments at Proserpine Dam and coastal, reef and blue water fishing.
- Whitsunday Regional Council has commissioned feasibility and gained funding for Flagstaff Hill Conference and Cultural Centre at Bowen and Lake Proserpine Barramundi Fishing and Interactive Nature Recreational Precinct. They are also planning a Marine Centre of Excellence in Bowen and are restoring Shute Harbour following damage from Cyclone Debbie.
- Whitsunday Regional Council prepare a Recreational Vehicle (RV) Tourism Development Plan and policy statement to assist community efforts to establish appropriate spaces and facilities for RV travellers in the Bowen, Collinsville and Proserpine areas

There are other local projects around the region in Bowen, Shute Harbour, Proserpine and Airlie Beach which should also be considered to establish their feasibility for priority support, development and funding. These include

- Whitsunday Skyway Project (priority project)
- Reef Education & Training Facility (possible location Grubby Bay)
- Development of Mountain Bike tracks around the region to increase landbased activity
- Maritime Education and Training Facilities in Bowen
- Enhanced Maritime Education & Training Facilities in Airlie Beach at the Whitsunday Sailing Club
- Marine & Slipway and Engineering services in Bowen
- Great Barrier Reef Marine Park Authority office in Airlie Beach
- Grandiose water park or a wave pool in Airlie Beach
- Establishment of fishing facilities and piers in Airlie Beach
- Dive wreck in the Whitsunday Marine Park
- Completion of all stages of Lake Proserpine Recreation Facilities
- Completion of Flagstaff Hill Interpretive Centre
- Mine tour in Collinsville
- Solar farm tour in Collinsville

TW and WRC to investigate and leverage funding from the Australian Government Tourism Demand Driver Infrastructure (TDDI) Program being distributed through Tourism & Events Queensland as well as other Queensland Government funding to develop feasibility studies and development of prospectus to attract potential investors

#### **4. Experience Development**

Visitors are more and more looking for experiences that enhance destinations and tourism products. To remain competitive Tourism Whitsundays in conjunction with TEQ need to deliver destination and experience development activities including reinforcing Queensland's competitive position through the Best of Queensland

Experiences Program, encouraging and supporting the tourism industry to innovate and deliver quality visitor experiences.

All Whitsunday businesses have a role to play in delivering the visitor 'experience' whether they are tour operators, accommodation and hospitality establishments, retail businesses, tourism or discovery centres, tour attractions, local councils, visitor information centres, environmental groups or protected area managers. What persuades a visitor to holiday in a specific destination is their ability to engage in unforgettable and inspiring experiences that touch them in an emotional way and connect them with special places, people and cultures

With Chinese visitor numbers increasing rapidly the tourism industry needs to be ready to cater for this important market. Not just with language skills, signage and cultural understanding but with their rapid uptake of new technology the new means of payment through QR codes on smart phones.

Regional food and culinary tourism continue to grow world-wide, opportunities identified in the last DTP have not come to life and it is not too late for the Whitsundays to feature their produce and seafood through visitor experiences. Whitsunday Regional Council have identified this in their Whitsunday Region Economic Development Strategy.

"Be different or be dead. Memorable experiences are about creating value. Value is the defining factor. When there is no difference, consumers buy on price alone. Whitsundays can only compete on price for so long but can compete on value forever." *The Experience Economy*

## **Strategy**

TW in partnership with TEQ / TA, key domestic and international trade and local industry, identify the ultimate Whitsunday experiences which deliver a genuine visitor "not to be forgotten" moment with exceptional products and services as well as deliver on the promise key target markets are seeking.

These experiences to provide the Whitsundays with a competitive advantage across all target consumer segments – couples, families, adventure and experience seekers, drive market, international holidaymakers and backpackers.

In partnership with QTIC deliver appropriate training to enable more businesses to be included in the TEQ Best of Queensland Experiences.

Identify opportunities for the Whitsundays to become a 'fun' destination with WOW.

WRC, TW, Greater Whitsundays Food Group, Canegrowers Organisation and the Bowen Gumlu Growers Association revisit culinary tourism opportunities in the region. Prepare a concept plan and a business case to develop a regional food produce and tourist centre in the Bowen area to showcase the Whitsunday region's quality produce and its emerging 'food culture'. Subject to the findings of the business case, call for expressions of interest (EOIs) to develop a 'Whitsunday Regional Food & Tourism Centre'

## **5. Brand and Marketing**

The Whitsundays Regional Council funded a review of the Whitsundays tourism brand in late 2018, the new brand was launched by Tourism Whitsundays in September 2019. The basis of the brand is –

The Whitsunday region will stun you. With its natural beauty and spectacular wonder, it is home to some of the most remarkable places the world has to offer. The tranquillity of the area centres itself on the calm of a simpler life while keeping the marvel of its natural wonders well within reach.

What our environment provides is a testament to its longing to keep people near. The land and locals cultivate a strong connection, where agriculture and farming build livelihoods while fishing and sailing build lifestyles. Here, down-to-earth people grow values that stem from nature and invite all visitors to experience it for themselves.

Everything that flourishes in the Whitsunday region is accompanied by a tropical warmth that extends well beyond the beaten path. It penetrates the region and its people, creating an optimistic outlook that guides us to see every day, rain or shine, as a great day for a new adventure.

Only in the Whitsunday region can you wander farther and still get closer.

The Whitsundays has opportunities to drive growth through its traditional visitor markets, as well as through emerging markets.

Target markets traditionally are segmented based on geographic as well as psychographic (travel mindset) factors.

### **Target Markets**

This marketing plan represents the beginning of a move towards valuable new ways of segmenting consumers, to allow us to focus our budget to achieve maximum ROI and embrace incredible new opportunities that many of our competitors are missing.

We have identified six priority target markets and seven secondary target markets based on traveller behaviour and interest, then layering on demographic and geographic factors where relevant. Our role as the Regional Tourism Organisation is to help travellers to move through the path to purchase more quickly than they would on their own, to achieve our business goals. For each of the priority market segments, we have identified the primary challenge(s) in the path to purchase in order to create objectives for our marketing activities.

### **Strategy**

Tourism Whitsundays to implement new brand and marketing strategy. TW to undertake new brand education, awareness and buy in by Whitsunday tourism, business and community by ensuring brand guidelines and components are understood and flexible enough to be used by all parts of the region as part of the One Whitsundays focus

## **6. Events**

The Whitsunday Regional Council funded a Whitsunday Major Festival and Events Attraction Strategy in late 2018.

### **Strategy**

Identify and develop iconic new events as well as grow existing events to attract increased participation and visitation across the region with outcomes which:

- Generate increased local economic activity and development in the Whitsundays;
- Attract external participation and visitation to the Whitsundays;
- Drive social and community outcomes for the Whitsundays, noting the important link between community outcomes and economic benefits; and
- Enhance the profile of the Whitsundays.

Source funding for events

Upskill event organisers

Tourism Whitsundays and the Whitsunday Regional Council need to, as part of the Partnership Agreement, identify the roles for each organisation in the Events space.

Funding for the marketing of Business Events needs to be considered as it is a high revenue market segment.

## **7. The Environment**

The Whitsunday region, in particular the maritime, islands and reef areas, are in a very sensitive environment which can be materially affected by natural events such as cyclones, global warming and by degradation or otherwise by human actions.

The 2014 DTP recommended the updating of the Whitsunday Ecotourism Plan (2008) in order to identify and preserve unique aspects of the Whitsunday environment. This did not occur and should be on the list of actions during the life of this DTP.

The 2014 DTP also identified a need for the development of a Whitsundays Airlie Beach Marine Discovery Centre, a facility providing excellence in interpretation—drawing on science, research and storytelling to provide visitors with an enriching experience. This again was recognised during consultation for this DTP but there was no proponent identified for the project. The redevelopment and expansion of the Living Reef exhibit at Daydream Island may well provide visitors with that experience without the need to duplicate it on the mainland.

The Whitsundays can lead the way in preserving the environment. This has already begun with the development of the Climate Change Innovation Hub in Cannonvale and lobbying the Queensland Government for the banning of single use plastics. Businesses have already stopped using pollutants such as plastic straws and the Eco Barge has collected 187,877 kg of marine debris/litter since 2009. A whole of destination Whitsundays Eco Action Plan should be developed which must involve council, businesses, Tourism Whitsundays, Chambers of Commerce, Tourism and Business. The plan would identify what needs to be done to reduce degradation of the environment and encourage all partners to take on responsibility for their actions. This would not only improve the environment but could also be a powerful PR campaign to highlight how the Whitsundays is walking the talk and looking after its pristine environment.

The Great Barrier Reef tourism industry's vitality and viability is inextricably linked to the Reef's long-term health. Tourism facilitates visitor engagement on initiatives which demonstrate recovery, regeneration and resilience.

### **Strategy**

TW, TQ and key stakeholders such as GBRMA work collectively with the Whitsundays tourism industry to participate in the High Standard Tourism Program with the aim to encourage best practice marine tourism on the GBR. This will ensure that Whitsundays operators maintain the highest standards by engaging with this voluntary program where GBRMPA recognises tourism operators who hold either Ecotourism or Advanced Ecotourism levels of Ecotourism Australia's Eco Certification. These two levels have environmental standards as well as interpretation standards and standards for working in partnership with the protected area agencies and the community, including Traditional Owners.

TW to encourage businesses to join the TEQ Best of Queensland Experiences program.

This provides confidence for consumers who wish to experience the Great Barrier Reef experience in the Whitsundays with a tourism industry which is environmentally conscious and provides the best GBR interpretive experience.

Tourism Whitsundays, Whitsunday Regional Council, Tourism Bowen, Proserpine Chamber of Commerce and Development, Whitsunday businesses and schools develop a Whitsundays Eco Action Plan to identify and action a plan to reduce single use plastics and other material that negatively impacts the Whitsunday environment.

TW to update the Whitsunday Eco Tourism Plan (2008)

## STRATEGIC PRIORITIES AND ACTIONS TO 2024

### Strategy One - One Whitsundays. Strengthen region's capacity to compete by building support from all area of the Whitsundays under the new brand Whitsundays

Action	KPI/Target	Lead Organisation	Partner Organisations	Time Frame
1.1 TW to create and implement a series of workshops across the whole region to showcase and explain the new brand and the key attributes and the guidelines on how they can be used by the whole Whitsundays region	Workshops held. Take-up of new brand elements by 50% of industry	TW	WRC, Chambers of commerce; Tourism Bowen; individual businesses	2019 and ongoing
1.2 TW and WRC develop a Partnership document outlining roles and responsibilities	Partnership developed	TW/WRC		2019/20
1.3 TW review funding options for TW	New funding agreements developed and agreed	TW/WRC	Stakeholders	2019/20

### Strategy Two – Access Build year-round affordable access

Action	KPI/Target	Lead Organisation	Partner Organisations	Time Frame
2.1 Attract and support increased and sustainable aviation access to the Whitsundays from priority domestic markets that have exceptional strategic value for the Whitsundays. Consistency, quality and frequency are essential. This includes key international Australian gateways which provide direct connectivity to the two local airports in Proserpine and Hamilton Island from key source international markets. Whitsundays, as a destination, to develop a partnership approach to airlines to establish new and sustain existing air services to overcome the somewhat seasonal and more niche perception of the Whitsundays. This partnership approach must align with aviation and tourism industry to include targeted marketing, promotional and trade initiatives to optimise any new and existing flights to the Whitsundays.		TW, WRC, Hamilton Island	Chambers of commerce; Tourism Bowen; individual businesses	2019 and ongoing

## Strategy Two – Access

### Build year-round affordable access continued

<p>2.2 WRC to continue to work with key State and Federal agencies to establish current priorities and timelines for the implementation of essential seasonal road access across the region as identified in previous DTP. The Whitsunday Region's identified road infrastructure priorities include resilience from flooding for access to the Whitsunday Coast Airport and the Bruce Highway from Airlie Beach; and building disaster resilience for the region's road network, particularly considering the impacts of Cyclone Debbie in March 2017. For State and Federal-controlled road infrastructure priorities, Whitsunday Regional Council has a role in advocacy and providing collaborative support where it can.</p>	<p>Road improvements to give flood resilience to Shute Harbour Road, Hamilton Plains, Proserpine Airport, Bruce Highway and Goorganga Plains</p>	<p>WRC</p>	<p>TW</p>	<p>2019 and ongoing</p>
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## Strategy Three - Support the development of new product that encourages distribution of visitors and tourist dollars throughout the region

Action	KPI/Target	Lead Organisation	Partner Organisations	Time Frame
<p>3.1 TW and WRC to review and identify new visitor experiences and developments priorities and opportunities.</p> <p>There are other local projects around the region in Bowen, Shute Harbour, Proserpine and Airlie Beach which should also be considered to establish their feasibility for priority support, development and funding</p> <p>TW and WRC to investigate and leverage funding from the Australian Government Tourism Demand Driver Infrastructure (TDDI) Program being distributed through Tourism &amp; Events Queensland as well as other Queensland Government funding to develop feasibility studies and development of prospectus to attract potential investors.</p>	<p>Working party established; review undertaken, and actions prioritised</p> <p>Priority project progressively actioned</p>	<p>WRC, TW</p>	<p>DEP (QPWS); TB; DSDIP</p>	<p>2019/21</p>

**Strategy Three - Support the development of new product that encourages distribution of visitors and tourist dollars throughout the region** continued

<p>3.2 The following have been identified as key projects which are supported by the Whitsundays tourism industry.</p> <p>A fully integrated brand name resort development. The suggested concept is an International Hotel-Convention Centre-Retail &amp; Dining precinct. Such a development would attract new high-yield markets and international publicity for the region.</p> <p>A community, entertainment and events centre. It is reported that once numbers are 260-300 then the only venue in the Airlie Beach-Islands region capable of conference hosting is Hamilton Island (which already has significant year-round business). It has been suggested that a multi-purpose convention centre at Airlie Beach is needed to host large events and provide an undercover venue during inclement weather. Anecdotal evidence suggests this will present an opportunity to boost mid-week occupancy rates, i.e. by hosting Australian (national/regional business meetings/events. Such a venue should be located within walking distance of most Airlie Beach accommodation and should have plenty of break-out rooms/ facilities, large plenary theatre with tiered seating, dining room, exhibition spaces, etc. and be capable of hosting over 500 delegates. Such a facility could be multipurpose, including car parking, a cinema and dining outlets. The idea requires concept and feasibility planning.</p> <p>Other development ideas identified by the tourism industry include</p> <ul style="list-style-type: none"> <li>• Whitsunday Skyway Project (priority project)</li> <li>• Reef Education &amp; Training Facility (possible location Grubby Bay)</li> <li>• Development of Mountain Bike tracks around the region to increase land based activity</li> </ul>	<p>Feasibility plans completed</p> <p>Developer sought</p>	<p>Tourism Industry, TW, WRC</p>		<p>2019/21</p>
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**Strategy Three - Support the development of new product that encourages distribution of visitors and tourist dollars throughout the region** continued

<ul style="list-style-type: none"> <li>• Maritime Education and Training Facilities in Bowen</li> <li>• Enhanced Maritime Education &amp; Training Facilities in Airlie Beach at the Whitsunday Sailing Club</li> <li>• Marine &amp; Slipway and Engineering services in Bowen</li> <li>• Great Barrier Reef Marine Park Authority office in Airlie Beach</li> <li>• Grandiose water park or a wave pool in Airlie Beach</li> <li>• Establishment of fishing facilities and piers in Airlie Beach</li> <li>• Dive wreck in the Whitsunday Marine Park</li> <li>• Completion of all stages of Lake Proserpine Recreation Facilities</li> <li>• Completion of Flagstaff Hill Interpretive Centre</li> <li>• Mine tour in Collinsville</li> <li>• Solar farm tour in Collinsville</li> </ul>				
3.3 Hold a forum in the Whitsundays to discuss and identify private enterprise product development opportunities	Forum held	TW	TW members	2019/20
3.4. Prepare a concept plan and a business case to develop a regional food produce and tourist centre in the Bowen area to showcase the Whitsunday region's quality produce and its emerging 'food culture'. Subject to the findings of the business case, call for expressions of interest (EOIs) to develop a 'Whitsunday Regional Food & Tourism Centre'	Concept Plan completed	WRC	TW, Bowen Gumlu Growers Assn	2020/21
3.5 Whitsunday Regional Council prepare a Recreational Vehicle (RV) Tourism Development Plan and policy statement to assist community efforts to establish appropriate spaces and facilities for RV travellers in the Collinsville and Proserpine areas	RV Tourism Development Plan completed	WRC	TW, Chambers of Commerce	2020

**Strategy Three - Support the development of new product that encourages distribution of visitors and tourist dollars throughout the region** continued

<p>3.6 Develop and implement the development of a series of self-drive trail brochures (joint use as web content) for the Whitsundays region. (Note: A 4WD trail plan as identified in the Whitsundays Ecotourism Strategy should be part of considerations)</p>	<p>Self-drive trails brochures finalised and distributed. Content placed on TW web site</p>	<p>TW</p>	<p>TB; Proserpine Chamber of Commerce; WRC; community volunteers; local history groups</p>	<p>2020-2024</p>
<p>3.7 Pursue opportunities to develop road-side rest areas, limited time free-camp areas, interpretation signage, etc. that support the regions ability to attract and retain grey nomad, RV and caravanning markets.</p>	<p>Road-side rest areas, limited time free-camp areas, interpretation signage, etc. facilities established</p>	<p>WRC</p>	<p>communities and chambers of commerce; Tourism Bowen; TW, DTMR, DITID</p>	<p>2020-2024</p>
<p>3.8 Pursue opportunities to develop touring routes, product and packages (either alone or in conjunction with adjoining regions) that attract visitation from adjoining regions (and/or encourage greater visitation to the broader region); e.g. fly-RV or caravan hire; a Mackay-Townsville touring route.</p>		<p>TW</p>	<p>Adjoining RTO's; individual businesses, DTMR, DETSB</p>	<p>2020-2024</p>

#### Strategy Four – Develop new and improve existing experiences to improve visitor satisfaction and extend stay.

Action	KPI/Target	Lead Organisation	Partner Organisations	Time Frame
<p>4.1 TW in partnership with TEQ / TA, key domestic and international trade and local industry, identify the ultimate Whitsunday experiences which deliver a genuine visitor “not to be forgotten” moment with exceptional products and services as well as deliver on the promise key target markets are seeking.</p> <p>These experiences to provide the Whitsundays with a competitive advantage across all target consumer segments – couples, families, adventure and experience seekers, drive market, international holidaymakers and backpackers.</p>	New plan completed and adopted	TW	TEQ/TA	2019/21
4.2 In partnership with QTIC deliver appropriate training to enable more businesses to be included in the TEQ Best of Queensland Experiences.	Program of training. 20% increase in businesses included in Best of Queensland program	TW	QTIC, individual businesses; Tourism Bowen	2019-2024
4.3 Identify opportunities for the Whitsundays to become a ‘fun’ destination with WOW.		TW	individual businesses; Chambers of Commerce, Tourism Bowen	2019-2024
4.4 Revisit culinary tourism opportunities in the region, develop a Culinary Tourism Plan. Cross reference with WRC’s development of a concept plan and a business case to develop a regional food produce and tourist centre in the Bowen area to showcase the Whitsunday region’s quality produce and its emerging ‘food culture’	Culinary Tourism Plan developed	TW	WRC, Greater Whitsundays Food Group, Canegrowers Organisation and the Bowen Gumlu Growers Association	2020/21
4.5 In order to cater for the rapidly growing Chinese visitor numbers the tourism industry needs to be ready for this important market. Training needs to be in place not just for language skills, signage and cultural understanding but for their rapid uptake of new technology the new means of payment through QR codes on smart phones.	Training courses run for the industry. X number of businesses trained	TW	QTIC, tourism operators	2019 ongoing
4.6 Celebrate Lunar New Year to be inclusive for our Asian visitors at this important time of year	New Year celebrations held in Airlie Beach	WRC	TW, Chambers of Commerce, Tourism industry	2019 ongoing

**Strategy Five - Grow consumer recognition that the Whitsundays is the gateway to the Great Barrier Reef (heart of the reef)**

Action	KPI/Target	Lead Organisation	Partner Organisations	Time Frame
5.1 Tourism Whitsundays to implement new brand and marketing strategy. TW to undertake new brand education, awareness and buy in by Whitsunday tourism, business and community by ensuring brand guidelines and components are understood and flexible enough to be used by all parts of the region as part of the One Whitsundays focus.	Brand and Marketing Strategy completed and implemented.  Base target visitor expenditure \$1.34B by 2025  Stretch target visitor expenditure \$2.14B by 2025	TW	WRC, tourism industry	2019
5.2 Develop an industry toolkit that assists operators to amplify the experiences of the Great Barrier Reef and other key, competitive nature-based assets in context of the destination brand	50% of TW membership utilising brand toolkit assets	TW	TW	2019-2024
5.3 Continue to work with the industry and community to align marketing communications to the destination brand	Conduction 4 brand updates per annum on the use of brand and brand assets	TW	Bowen Tourism, tourism industry	
5.4 Undertake marketing activity that communicates the brand values of the Whitsundays, its proximity to the Great Barrier Reef, the number of islands and water activities to the target markets in collaboration with industry and the community		TW	TEQ, individual businesses	2019-2024

**Strategy Six - Grow the number and quality of events across the Whitsundays region** continued

Action	KPI/Target	Lead Organisation	Partner Organisation	Time Frame
6.1 Develop an Events Strategy including an audit of existing community festivals and events (including sporting, music and cultural festivals) and identify opportunities for existing and emerging events throughout the region to become part of a coordinated calendar of events with Tourism Whitsundays.	2-3 new Significant Events added to regional calendar by 2024; All funded events reaching or exceeding attendance and sponsorship targets; One Capacity building workshop per annum to assist in building skills of events organisers; 10 New events established	WRC	TW, Events organising groups; TEQ; chambers of commerce; Tourism Bowen	2020 -2024
6.2 Develop as part of a Partnership Agreement – identifying TW and WRC’s roles and responsibilities in the Event space	Roles and responsibilities established and included in a WRC/TW Partnership document	TW/WRC		2019 - 2020
6.3 Identify ways to grow existing events so that TEQ acknowledges and promotes significant events	Five events included in TEQ’s Significant Events	TW/WRC	Events organising groups; TEQ; chambers of commerce;	2020 - 2021
6.4 Opportunities for recreational fishing and major fishing competitions based around the developments at Proserpine Dam and coastal, reef and blue water fishing.	Two new Fishing competitions	TW/WRC	Event organisers	2019/21
6.5 Business Events are a significant part of the Whitsunday tourism market. It is essential that Tourism Whitsundays is funded to service this market. The cost of doing this should be part of the review of the funding of TW	Sufficient funding for Business Events	TW	TEQ/WRC/TW Business Events members	2019/21

## Strategy Seven - Protect and promote Whitsundays marine and natural environments

Action	KPI/Target	Lead Organisation	Partner Organisations	Time Frame
7.1 Advocate to politicians, governments and industries for the protection of the region's marine and natural environments WRC; TW; GBRMPA; DEP (QPWS); DSDIP		Individual businesses, residents and visitors	WRC; TW; GBRMPA; DEP (QPWS); DSDIP	Ongoing
7.2 Within new brand and marketing strategy identify opportunities to market around the theme of Promoting Whitsundays Unique Biosphere (marine and natural environments)		TW	individual businesses; Tourism Bowen; WRC; GBRMPA; DEP (QPWS);	2019 - 2024
7.3 A whole of destination Whitsundays Eco Action Plan should be developed which must involve council, businesses, Tourism Whitsundays, Chambers of Commerce, Tourism and Business. The plan would identify what needs to be done to reduce degradation of the environment including single use plastics and encourage all partners to take on responsibility for their actions. This would not only improve the environment but could also be a powerful PR campaign to highlight how the Whitsundays is walking the talk and looking after its pristine environment.	Whitsundays Eco Action Plan developed, and partners identified to take forward the actions	WRC/TW	TB, Chambers of Commerce, industry partners	2020 - 2024
7.4 Review and update the Whitsundays Ecotourism Plan 2008	New Whitsunday Ecotourism Plan developed	TW	WRC, GRMPA, QPWS, industry partners	2021

### Strategy Eight – Improve industry resilience to the impacts of severe weather events

Action	KPI/Target	Lead Organisation	Partner Organisation	Time Frame
8.1 Advocate for flood mitigation of the road between Whitsunday Coast Airport and Airlie Beach-Shute Harbour (and for improving the Bruce Highway generally)	Increased funding for road infrastructure.	WRC	WRC; TW; chambers of commerce; Tourism Bowen	2019 ongoing
8.2 Avoid the peak cyclone season when staging large events (depending on the nature of the event and target markets)	No major events scheduled between Jan - April	Event organisers	TW/WRC	2020
8.3 Ensuring stronger collaboration in communication and media strategies during time of natural disasters	Partner with relevant agencies to develop a regional risk management plan & communications plan	WRC	TW; VIC's; individual businesses; TEQ	2019 reviewed annually
8.4 Partner with relevant agencies to identify and report economic impacts and severe weather events. Learn from the lessons of Cyclone Debbie	Develop a business impact analysis tool that can be rapidly implemented following severe weather events.	TW	individual businesses	2019 reviewed annually

### Strategy Nine - Increase engagement by the tourism industry in advocacy and planning activities that impact upon the industry

Action	KPI/Target	Lead Organisation	Partner Organisation	Time Frame
9.1 Advocate for TW members, chambers of commerce, event organisers, individual tourism and other business that benefit from tourism, to be more actively involved in advocacy and planning that does, or is likely to, impact on the industry	Tourism industry issues are incorporated in local, regional, state and national strategies and plans; increased resource allocation to the Whitsundays tourism industry; increased community recognition and support for the industry	TW	chambers of commerce; Tourism Bowen: individual businesses;	2019 and ongoing
9.2 Advocate for certainty in 457 and 187 visas. Many Whitsunday tourism businesses are dependent on international staff.	Continuity of 457 and 187 visas	TW	chambers of commerce; Tourism Bowen: individual businesses;	2019 and ongoing

## ACRONYMS AND BIBLIOGRAPHY

### Table of Acronyms

- **BCE** – Bowen Collinsville Enterprise;
- **GBRMPA** – Great Barrier Reef Marine Park Authority;
- **DES** – Department of Environment and Science National Parks;
- **DSDIP** – Department of State Development, Infrastructure and Planning;
- **DITID** – Department of Innovation, Tourism Development, Events and Small Business;
- **DTMR** – Department of Transport and Main Roads;
- **QPWS** – Queensland Parks and Wildlife Service;
- **REDC** – Mackay Isaac Whitsundays Regional Economic Development Corporation;
- **ROC** – Whitsunday Region Organisation of Councils;
- **TB** – Tourism Bowen;
- **TEQ** – Tourism and Events Queensland;
- **TW** – Tourism Whitsundays;
- **VIC** – Visitor Information Centres;
- **WRC** – Whitsunday Regional Council.

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# APPENDIX

## Appendix A - Summary of Destination 20 Year Plan 'Six Key Themes'

(From Queensland tourism 20-year plan Consultation Workbook (2013); Department of Tourism, Major Events, Small Business and the Commonwealth Games)

### 1. preserving 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.

### 2. offering 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.

### 3. targeting 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.

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

### 5. building 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.

### 6. growing investment

- The ability of the industry to invest and innovate will be encouraged through the continued reduction of unnecessary red tape.
- Well-planned, timely public and private infrastructure will enable tourism growth and visitor access



**Thank you** to all our partners and the stakeholders who contributed to the development of this Whitsundays Destination Tourism Plan, including;

- Tourism and Events Queensland
- Whitsunday Regional Council
- Airlie Beach Chamber of Commerce
- Tourism Bowen
- Proserpine Chamber of Commerce
- Tourism Whitsundays industry members Strategy