



Tropical North Queensland

Tourism Opportunity Plan

2010-2020





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Executive Summary

Dunk Island

Purpose

The purpose of this Tourism Opportunity Plan (TOP) is to provide direction for the sustainable development of tourism in the Tropical North Queensland region.

The TOP aims to:

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

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

The development of the TOP has been based on extensive research as well as consultation with a diverse range of regional and external stakeholders including government agencies, tourism industry, tourism stakeholders, developers and investors.

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

1. Project meets the needs of growth target markets;
2. Potential to stimulate growth in the TNQ region over the next 10 years;
3. Development of new products compliments and does not unnecessarily compete with existing products;
4. Strong level of interest from local stakeholders;
5. Project is aligned with the vision for the region and community aspirations;
6. Likely net benefits across the social, environmental and/or economic outcomes;
7. Project aligns with Local, State or Federal Government priorities and likely to gain support from the decision makers.

Catalyst Projects

Through the consultation and review process the following 18 catalyst projects have been identified for the Tropical North Queensland region. These projects are tourism investment or infrastructure projects of regional significance which are expected to act as a catalyst to a range of other investment, marketing and product development opportunities.

1. **Cairns Arts, Cultural and Events Precinct**
2. **Australian World Heritage Centre Cairns**
3. **Port Douglas Waterfront Development**
4. **Daintree Sustainable Tourism Gateway**
5. **Welcome to Country Experience**
6. **Education and Wellbeing Tourism**
7. **Clump Point Safe Boat Haven**
8. **Tablelands Adventure Cycle and Recreation Trails**
9. **Barron Gorge Tourism Precinct**
10. **Torres Strait Islands Experience**
11. **Cape York Wilderness Experience**
12. **Great Green Way Nature Trail**
13. **TNQ Culinary Tourism**
14. **Tablelands Accommodation**
15. **Cooktown Port and Marina**
16. **TNQ Drive Tourism Private Public Partnership**
17. **Gulf Monsoon Centre**
18. **Gulf Barramundi Program & Discovery Centre**

Precinct Projects

A large range of tourism projects were considered in the preparation of this TOP. In addition to the suggested Catalyst projects, a range of additional Precinct Tourism and Support infrastructure projects from across the region are presented as having considerable merit for further investigation.

Implementation

Tourism Tropical North Queensland, working in partnership with the Department of Employment, Economic Development and Innovation Queensland, will be the key influencer in prioritising and advocating the implementation of the TNQ TOP. This partnership will need to work closely with Local Government, key State Government and Federal Government agencies and the tourism industry throughout the region to develop project recommendations and action groups.

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Acronyms

ABS	Australian Bureau of Statistics
ARRF	Australian Reef and Rainforest Foundation
DEEDI	Department of Employment, Economic Development and Innovation
DIP	Department of Infrastructure and Planning
DMP	Destination Management Plan
GBRMPA	Great Barrier Reef Marine Park Authority
IVS	International Visitor Survey
JCU	James Cook University
LGA	Local Government Area
LTO	Local Tourism Organisation
NP	National Park
NVS	National Visitor Survey
QTS	Queensland Tourism Strategy
QTIC	Queensland Tourism Industry Council
RTIIP	Regional Tourism Investment and Infrastructure Plan
RTO	Regional Tourism Organisation
STO	State Tourism Organisation
TQ	Tourism Queensland
TOP	Tourism Opportunity Plan
TNQ	Tropical North Queensland
TTNQ	Tourism Tropical North Queensland
TFC	Tourism Forecasting Committee
VIC	Visitor Information Centre
VFR	Visiting Friends and Relatives
WTMA	Wet Tropics Management Authority



1 Context

Cairns Esplanade
Lagoon

1.1 What is a Tourism Opportunity Plan?

The purpose of this Tourism Opportunity Plan (TOP) is to provide direction for the sustainable development of tourism in the Tropical North Queensland (TNQ) region.

The TOP aims to:

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

In November 2006, the Queensland Government delivered the Queensland Tourism Strategy, a 10-year vision for sustainable tourism. To achieve its vision, Tourism Queensland (TQ) and the Queensland Tourism Industry Council (QTIC) in partnership with the Department of Employment, Economic Development and Innovation (DEEDI) developed six key themes. Under theme 2 'Investment, Infrastructure and Access' Tourism Queensland, in partnership with Regional Tourism Organisations (RTOs) was responsible for preparing Regional Tourism Investment and Infrastructure Plans (RTIIPs) for each tourism region across Queensland. The TOP is the new name for the RTIIP, a title that is considered to better represent the content and intent of the document.

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

The development of the TOP has been based on extensive research as well as consultation with a diverse range of regional and external stakeholders including government agencies, tourism industry, tourism stakeholders, developers and investors.

The TOP also recognises the various other Government strategies and plans which may impact on tourism and which exist in the region including 'Queensland Tourism Strategy, TNQ Destination Management Plan, Cape York Peninsula and Torres Strait Tourism Development Action Plan, TNQ Repositioning Study Report, TNQ Regional Infrastructure Report, Vulnerabilities study: regions with a high dependency on tourism, and the TNQ Future-Proofing Program Report.

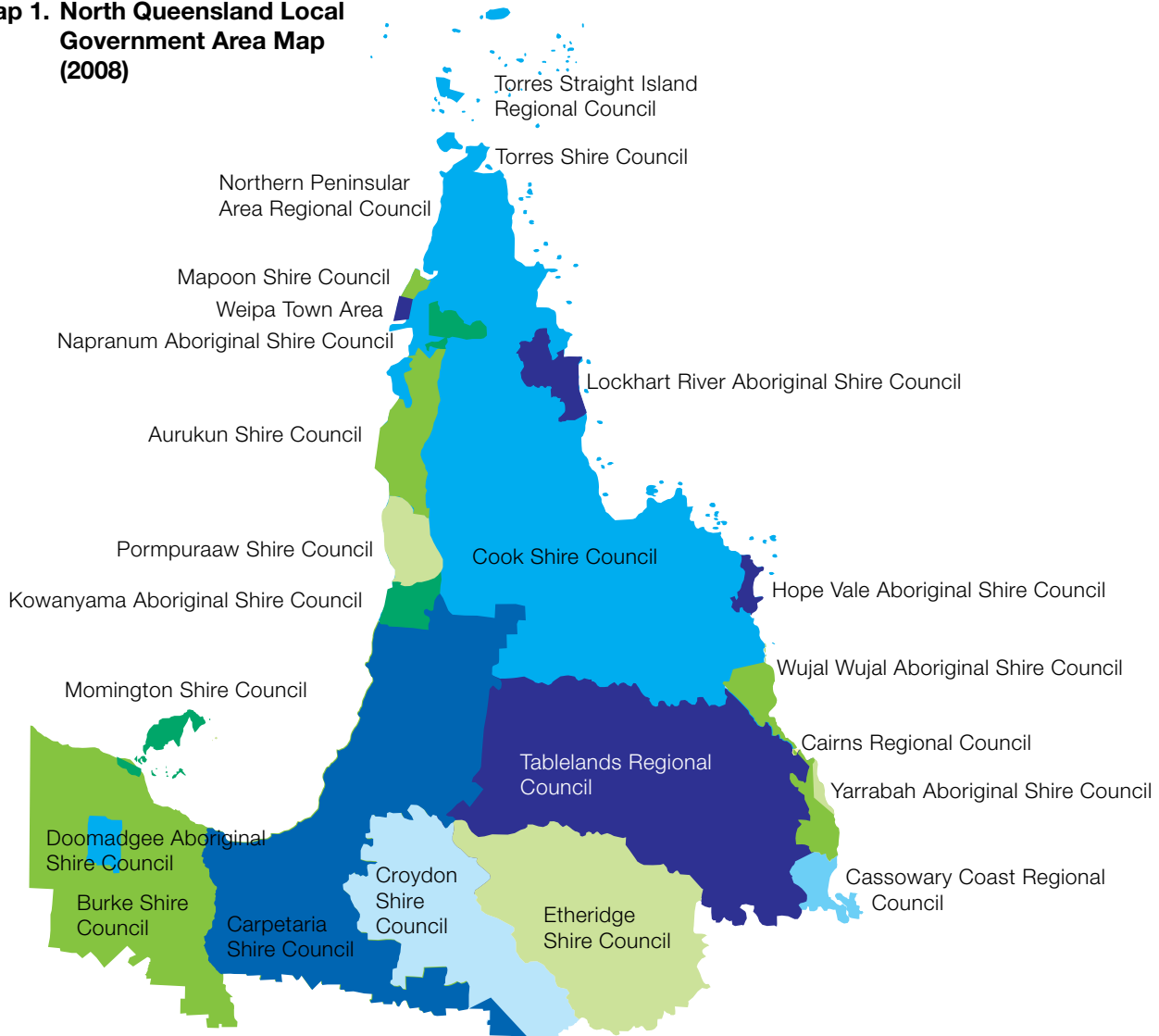
1.2 The Tropical North Queensland Region

The TNQ region (refer Map 1.) is comprised of the 22 local government areas of Aurukun Shire Council, Cairns Regional Council, Carpentaria Shire Council, Cassowary Coast Regional Council, Cook Shire Council, Croydon Shire Council, Doomadgee Aboriginal Shire Council, Etheridge Shire Council, Hope Vale Aboriginal Shire Council, Kowanyama Aboriginal Shire Council, Lockhart River Aboriginal Shire Council, Mapoon Aboriginal Shire Council, Mornington Shire Council, Napranum Aboriginal Shire Council, Northern Peninsula Area Regional Council, Pormpuraaw Aboriginal Shire Council, Tablelands Regional Council, Torres Shire Council, Torres Strait Island Regional Council, Weipa Town Area, Wujal Wujal Aboriginal Shire Council and Yarrabah Aboriginal Shire Council.

The region covers 20% (340,645 km²) of the total area of Queensland and yet is home to just 6 percent of the state's population (274,116 at June 2009). Alone, the Cairns region contains 61% (2009) of the TNQ population.

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

Map 1. North Queensland Local Government Area Map (2008)



The TNQ region is a significant contributor to Australian inbound tourism, and is the third most important international holiday destination after Sydney and Melbourne. Tourism accounts for over 40% of the regions outside earnings, and contributes almost 15.5% of gross regional product (over twice the state average). Tourism expenditure at March 09 year end was \$2.315 billion in TNQ, with domestic visitors spending \$1.339 billion and international visitors spending \$976 million.

Tourism accounts for 19.9% of regional employment. Based on the 2006 Australian Bureau of Statistics (ABS) tourism in TNQ directly employed around 16,250 people in TNQ and is indirectly responsible for thousands of jobs in other areas such as service and supply, real estate, building and retailing. In Queensland, one full time job is created or supported through the arrival of every 65 international visitors and another for every 167 domestic visitors. While the population growth of the region over the decade is around 2.9% per annum, the growth of visitor numbers is around 14%. On average there are 38,500 tourists in the region every day. This represents a 15% boost to resident numbers.

The region has a diverse range of accommodation options with 224 establishments in the hotels, motels and serviced apartment category providing 352,552 beds. This is supplemented by a further 4104 beds in holiday flats and units category, as well as backpacker hostels. The marine fleet is the

largest in Australia, transporting in excess of 1 million guests per annum to the reef or nearby islands. Product experiences on offer exceed 1400. Over 70 new infrastructure developments have been established in the last 5 years. Business Tourism events contribute \$100 million directly to the local Cairns economy and over \$350 million to the wider TNQ region, with over 922 business events bringing 70,000 delegates to the region each year.

The destination will attract 52 international flights and 237 domestic flights per week during the northern summer April - October 2010 scheduling period. Annual combined inbound and outbound aviation capacity is approximately 3.8 million for domestic and 770,000 international (TQ Domestic Capacity Report, May 2010; International Capacity Report, Northern Summer, 2010). Cairns Airport is the 7th busiest airport in Australia, and 6th busiest for international passengers. In 2009, 48% of domestic arrivals and 65% of international visitors used air services to access the region.

The estimated population of TNQ in 2009 was 271,351 and the average annual growth during the previous 5 years was 3%. The Cairns council area, including Yarrabah and Port Douglas, accounts for 62% of the region's population with 166,984 people, and reflected the strongest growth rates over the previous 5 years.

The relativities of the other regions are shown below.

Sub-region Areas	2004	2009	Average Annual Growth (%)	Proportion of region population 2009
Gulf Savannah (Burke Shire Council, Carpentaria Shire Council, Mornington Shire Council, Etheridge Shire Council, Doomadgee Aboriginal Shire Council and Croyden Shire Council)	6,209	6,233	0.10%	2%
Cassowary Coast Regional Council	30,166	30,992	0.50%	11%
Cape York and Torres Strait (Cook Shire Council, Hope Vale Aboriginal Shire Council, Mapoon Shire Council, Aurukun Shire Council, Northern Peninsula Area Regional Council, Pormpuraaw Aboriginal Shire Council, Torres Strait Island Regional Council, Torres Shire Council, Weipa Town Area)	22,033	23,744	1.51%	9%
Tabelands Regional Council	42,190	46,366	1.90%	17%
Cairns Region (including Yarrabah Aboriginal Shire Council, Wujal Wujal Aboriginal Shire Council)	140,337	167,336	3.58%	61%
Total TNQ	240,935	274,671	3.58%	100%

Source: Australian Bureau of Statistics, Regional Population Growth (Cat no. 3218.0) and unpublished data

In 2009, TNQ welcomed over 2.17 million visitors. Of this 70% were from domestic and 30% were from international markets. The average length of stay (ALOS) for holiday visitors is 5.6 days for domestic and 7.9 days for international.

International holiday visitors represent nearly 42% of the total holiday visitor mix of 1.417 million, and account for almost 5million visitor nights, or 50% of the total holiday visitor night mix (9.23 million.) Youth travellers (under the age of 30) account for 43% of all international visitors to Tropical North Queensland.

Domestic Visitation as at December 2009

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Total Domestic						
Holiday	827,000	-1%	4,593,000	9%	5.6	0.6
VFR	356,000	-11%	1,492,000	-26%	4.2	-0.8
Business	272,000	30%	1,128,000	43%	4.2	0.4
Total	1,521,000	1%	7,868,000	6%	5.2	0.3
Intrastate						
Holiday	421,000	-12%	1,590,000	-6%	3.8	0.3
VFR	274,000	-20%	953,000	-32%	3.5	-0.6
Business	218,000	n/p	819,000	n/p	3.8	1.1
Total	970,000	-5%	3,822,000	3%	3.9	0.3
Interstate						
Holiday	406,000	14%	3,003,000	20%	7.4	0.4
VFR	82,000	32%	539,000	-12%	6.5	-3.5
Business	54,000	n/p	309,000	n/p	5.7	-0.4
Total	551,000	11%	4,045,000	9%	7.3	-0.2

International Visitation as at December 2009

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Total Domestic						
Holiday	590,000	-15%	4,636,000	-4%	7.9	0.9
VFR	32,000	-20%	437,000	-33%	13.6	-3.0
Business	16,000	-33%	90,000	-32%	5.7	0.1
Total	651,000	-14%	6,236,000	-3%	9.6	1.1

Key International Market Source Markets to TNQ as at December 2009

Total visitors	Visitors	Annual % change	Nights	Annual % change
United Kingdom	121,000	-8%	1,118,000	-15%
Japan	89,000	-45%	576,000	-30%
United States	83,000	-8%	484,000	-19%
Germany	48,000	-4%	652,000	28%
China	41,000	41%	125,000	69%

Holiday Visitors as at December 2009

Holiday visitors	Visitors	Annual % change	Nights	Annual % change
United Kingdom	116,000	-7%	973,000	-5%
Japan	82,000	-47%	470,000	-32%
United States	74,000	-11%	355,000	-17%
Germany	45,000	-6%	465,000	-1%
China	38,000	41%	107,000	55%

1.3 Future Tourism Profile

The Tourism Forecasting Council (TFC) prepares future tourism demand projections at the national and state levels but not for regional areas like TNQ. While these national forecasts do not fully reflect the unique characteristics of TNQ tourism, they do provide an indication of key trends in tourism demand and growth.

International tourism experienced a difficult year in 2009, as the world economy starts to recover from the downturn caused by the global financial crisis. According to the TFC, Australia has held ground as a tourism destination in the Asia-Pacific region, compared to markets such as Japan, Canada, the United States, and Singapore, which showed large declines in the number of international visitors.

The TFC forecasts international arrivals to Australia to grow by 3.9% annually to 2019. The forecast growth rate over the 2009-2019 period is almost double the annual growth rate in the previous 10 year period (2.3% growth between 1999 and 2009).

According to the TFC, growth in the inbound segment will be sourced from:

- the Australian dollar averaging US\$0.86 in 2010 before declining modestly to US\$0.81 over the period to 2015. This assumed value of the Australian dollar is well above the 27-year average of around US\$0.74;
- further but more modest growth in international aviation capacity to Australia
- deployment of additional aircraft on long haul routes such as Australia-Europe (via hubs in the Middle East and Asia) and on direct shorter-haul routes from Asia and the United States.
- expected strong growth in seats from low cost carriers, such as Air Asia X and Jetstar. This will make more seats available in peak periods for leisure travel while minimizing upward pressure on airfares during these periods.

Inbound markets forecast to record strong growth over the next ten years include India (annual growth of 11.2%), the Middle East (10.7%), China (7.9%) and Indonesia (7.7%).

The China segment is expected to grow strongly and set to become Australia's most valuable market by 2013. New Zealand, the United Kingdom and the United States are also projected to provide a large proportion of the growth in international visitor arrivals to Australia over the period.

Domestic visitor nights are forecasted to grow modestly at 0.6% annually in the period from 2009 to 2019, as domestic tourism will continue to face intense competitive pressure from other goods and services, including overseas travel.

Domestic tourism's share of the total economic value for tourism is forecasted to decline from 73% in 2009 to 66% in 2019. With the ageing Australian population and the flow on benefits of compulsory superannuation, the 'active seniors' (persons aged 55-69 years) are expected to be an important growth segment in the medium term in a flat domestic tourism market.

National Visitor Projections (2009-2019)

International Visitors	Domestic Visitors
<ul style="list-style-type: none"> ■ Growth in overall international visitor numbers ■ Increase in average length of stay 	<ul style="list-style-type: none"> ■ Stable in number of domestic trips ■ Small growth in the VFR market ■ Declining average length of stay

The TFC report for Queensland showed that tourism is expected to grow at the national average in international visitor nights in the long term.

- Inbound visitor nights in Queensland are expected to increase by 3.6% to 55.4 million nights in 2019, representing 22% of international visitor nights in Australia.
- Stronger growth in the holiday market is forecasted for the regional Queensland area compared to the metropolitan (Brisbane and Gold Coast) area.

For domestic tourism, the forecasts also showed Queensland would experience a moderate growth in line with national forecasts.

- Domestic visitor nights in Queensland are expected to increase by 0.6% annually to 74 million nights in 2019.
- The domestic growth rates are expected to be fairly similar for both metropolitan and regional Queensland.

The TOP recommendations for catalyst projects take into account the long-term trends, rather than the short-term impacts of the global financial crisis. That is, a returning international inbound market and a relatively stable domestic market. It should be noted that trends towards shorter holidays, low-cost air travel and more 'experiential' holidays remain underpinning social trends that impact on the type, if not the volume, of future holidays. Key factors in TNQ's favour are its strong natural attributes – the Great Barrier Reef and Wet Tropics Rainforest and its continued strong international visitation.



2 Methodology

Palm Cove

2.1 Tourism Opportunity Plan Development Methodology

The development of this TOP involved the following key steps:

- Reviewed existing documents with relevance to tourism in TNQ – in particular the TNQ Destination Management Plan, Cape York Peninsula and Torres Strait Tourism Development Action Plan, TNQ Repositioning Study Report, TNQ Regional Infrastructure Report, Vulnerabilities Study: Regions with a High Dependency on Tourism, and the TNQ Future-Proofing Program Report.
- Consulted with numerous stakeholders in the tourism industry and public sector in the region;
- Conducted workshops and consulted with stakeholders regarding draft potential developments;
- Discussed options and potential developments with the Project Steering Committee for this TOP.

2.2 Stakeholder Consultation

A high level of stakeholder consultation was undertaken in the development of the TOP. A combination of stakeholder surveys, workshops and interviews were used to engage and consult with stakeholders throughout the TOP process. The consultative network included key stakeholders from:

- Department of Employment, Economic Development and Innovation
- Regional and Local Tourism Organisations
- Local Government representatives
- Department of Transport and Main Roads
- Department of Infrastructure and Planning
- Department of Environment and Resource Management
- Other State Government Agencies
- Chamber of Commerce
- Community Organisations
- Tourism Associations representatives
- Tourism Operators/ Industry
- Niche Market Operators and Representatives
- James Cook University

2.3 Project Assessment Criteria

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

1. Project meets the **needs of growth target markets**;
2. Potential to **stimulate growth** in the TNQ region over the next 10 years;
3. Development of new products **complements** and does not unnecessarily compete with existing products;
4. Strong level of **interest from local stakeholders**;
5. Project is **aligned with the vision for the region** and community aspirations;
6. Likely **net benefits** across the social, environmental and/or economic outcomes;
7. Project aligns with **Local, State or Federal Government priorities** and likely to gain support from the decision makers.

The key catalyst projects were also assessed on their appeal as significant iconic projects that have the potential to add significantly to the image and appeal of TNQ as a tourist destination.

The tourism industry in TNQ is so intertwined and interlinked with other industries and the local community that it is apparent that tourism issues and opportunities cannot be treated in isolation. As a result the TOP contains a number of recommendations that will involve stakeholders outside of the tourism realm. This adds strength to the process, as some very important issues impacting the TNQ tourism industry will require significant levels of investment to address them fully. While the level of investment required may not measure up to rigorous cost/benefit analysis on tourism needs alone, when the similar needs of other industries or the general community are factored in, the level of investment required may become viable.



3 A Vision for the Tropical North Queensland region

Beachfront
Palm Cove

The vision for TNQ as outlined in the TNQ Destination Management Plan (DMP) 2007-2010 is:

'To be the world's best tropical holiday destination'

This will be achieved by increasing the economic contribution of tourism throughout TNQ, maintaining consistent brand positioning to ensure the delivery of life-enhancing tropical moments, supporting sustainable management and development of tourism across the destination and encouraging appropriate tourism investment in the destination.

In 2011 it is planned to revisit and reproduce the TNQ Destination Management Plan. The key elements of destination management including the vision all remain relevant. Some adjustments to the brand position and creative for the region will be updated in October 2010 and regular updates can be sought through either TQ or Tourism TNQ.

3.1 Tropical North Queensland Tourism Opportunity Plan Vision

From extensive desktop research and the stakeholder consultation process, a number of common themes can be identified as core elements of the vision for the future growth and development of tourism in the TNQ region. The following development goals were used as the basis for the vision for tourism opportunities in TNQ.

The types of development desired in the region are projects that:

- Are different from existing tourism products and services;
- Recognise and highlights the internationally and nationally significant World Heritage listed natural and pristine environments of the Great Barrier Reef and the Wet Tropics Rainforest;
- Recognise the need to diversify and develop tourism product and services for 'non' leisure visitor segments;
- Support a sustainable tourism industry.
- Protects and enhances the lifestyle of residents in TNQ.

Therefore, the working Vision adopted for the TNQ TOP is:

'To encourage sustainable tourism opportunities that immerse targeted visitors in experiences which compliment the region's unique natural and cultural assets'

TNQ is a key destination for domestic and international tourists and it provides a number of 'iconic' visitor experiences based around the reef and rainforest. In compiling and consulting on the TOP, it is important to note that key objectives in the region include growth of visitor numbers, growth of visitor expenditure and regional dispersal of visitors beyond the Cairns to Port Douglas corridor. The recommendations in the TOP are aimed to broadly position the experiences of adventure and natural encounters as key differentiating points for the region and to connect with another very strong attribute of the region being the people and their history and culture. Growing economic benefit across the broad region through new ideas, diversification and visitor dispersal is critical and this has been a key consideration in the selection of catalyst projects for the region.

3.2 Target Markets

Domestic

Since the TNQ DMP was published, TQ has undertaken a new approach to identifying domestic target markets based on consumer segmentation. The segmentation is a result of research of some 6,000 Australian consumers, looking to understand the emotional drivers for their ideal holiday experience. Based on the results of this research the consumer groups best suited to TNQ are the 'Social Fun-seekers' and 'Connectors'. These groups make up 25% and 32% of the travelling domestic population, respectively.

The **Active Explorers** market has also been identified as a long-term growth market. This group makes up 11% of the travelling domestic population.

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

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



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

The TNQ DMP identifies the core target market segments that are expected to provide the greatest potential for growth of tourism in the region. These target markets are demographic specific and therefore this TOP will focus on TQ's new segmentation approach model.

Core Target Markets

Interstate: Social Fun Seekers (primary) and Active Explorers (Secondary) in Sydney and Melbourne

Intrastate: Connectors in Brisbane and Regional Queensland (400km radius of TNQ)

International

International target markets have been identified through a combination of Tourism Australia (TA) segmentation research and other factors such as forecast visitation and expenditure.

Internationally, Tourism Australia works to promote the Australian experience to the 'Global Experience Seekers' through tailored marketing messages.

'Global Experience Seekers' consists of approximately 40% of the global long haul travel market; they have a mindset all of their own that stretches well beyond the holiday behaviour and the category of travel. They are open to new experiences to learn more about themselves.

Global Experience Seekers are marketing, advertising and technologically savvy, more open minded, less materialistic, more driven, and can be any nationality. They seek authentic personal experiences that touch their senses and challenge them.

Priority markets for TNQ include: -

Priority One Markets: The Japan, United Kingdom, North America, China, Germany and New Zealand markets account for the majority of current visitors to TNQ and will remain a major focus of marketing activities.

Priority Two Markets: The India, Italy, Korea, France, Scandinavia Singapore, Guam and PNG markets account for a smaller proportion of current visitors to TNQ however they have potential for further growth and will therefore be a secondary focus of marketing activities.

Developing markets: Developing markets that may represent opportunity for the future include Korea, South America, Russia and the Middle East. A market development and trade strategy will be targeted as opposed to any marketing in these regions.

4 GAP Analysis

Frangipani
Coconut Island

4.1 Destination Opportunities and Challenges

The following gap analysis is based on a combination of stakeholder consultation and feedback, desktop research and an analysis of secondary data and information. This gap analysis focuses on the future investment and infrastructure potential for the region and was used to underpin the development of recommendations contained within the TOP.

Destination Strengths

- World-class airport
- Competitive holiday options
- Rich cultural diversity
- Visitor security and safety
- Domestic and international appeal
- Industry cohesiveness
- World class reef and seaport terminal
- Accessible World Heritage sites and national parks
- Geared for volume
- Strong variety of precinct visitor experiences on offer
- The destination offers a wide range of accommodation from backpacker hostels to 5-star accommodation
- Rich diversity of experiences available to attract long stay and repeat visitation.

Destination Challenges

- Reliance on air transport
- Depth of the destination not readily understood
- Limited visitation during shoulder seasons
- Slow development of Indigenous tourism product
- Limited supply of quality accommodation outside the Cairns corridor
- Limited supply of both skilled and unskilled hospitality staff, particularly in remote locations
- Competition for domestic visitors has increased between destinations offering a tropical holiday. i.e. Thailand, Fiji, Philippines, Vanuatu and Indonesia mainly due to Low Cost Airlines
- Global warming/climate change leading to coral bleaching and potential extreme weather patterns threaten to impact visitation

- Possibility that rapid population growth is not matched by adequate investment in infrastructure (e.g. electricity, water and transport services)
- Holidays in region are highly priced against competitor destinations and at the mercy of fluctuating exchange rates and other external economic factors
- Relatively low population base affects regions competitiveness
- Distance from key population hubs can act as deterrent
- Seasonal weather can affect access and visitor comfort
- The value of tourism to the local economy is not fully appreciated by the wider community

4.2 Potential Growth Segments

The TOP aims to identify new sustainable projects and opportunities for TNQ. Therefore the following segments have been taken into consideration when identifying the catalyst projects as potential growth segments for moving forward.

Health and Wellness Tourism

Current estimates of the global value of this sector is approximately \$50 billion, this is in addition to the expenditure on 'soft health' travel such as spa treatments and health checks. A recent report predicts that outbound medical travel from the US alone would be worth US \$162 billion by 2012.

This is a segment that TNQ should consider for medium/ long term development as the destination has access, the accommodation, and the climate to cater for these tourists. The benefits to TNQ from the development of this sector would not only be the tourism flows but also the provision of additional services for the local population. This segment requires a whole of government response to ensure the health department together with the tourism promotional bodies creates a long term plan which will see the infrastructure needs developed in conjunction with demand. This could be developed alongside the 'soft' medical sector that includes wellness/ health spas, or cosmetic procedures, to broaden the reputation of the destination as being a place of rejuvenation.

Sports Tourism

Sports tourism is a multi-billion dollar business, one of the fastest growing areas of the global travel and tourism industry. The economies of cities, regions and even countries around the world are increasingly reliant on the visiting golfer and skier or the travelling football, rugby or cricket supporter. In some countries, sport can account for as much as 25 percent of all tourism receipts. Sports tourists are passionate, high-spending, enjoy new sporting experiences and often stimulate other tourism. Their direct benefit to a destination is cash- their indirect benefit can be years of follow-on tourists. In the case of Australia, it appears that sports tourism might represent about 5 percent of the overall tourism market, equating to tourism expenditure of about \$3 billion per annum. It is a segment that TNQ should consider, given its many attributes, and which can bring such valuable spin offs for the region such as media exposure; demand for training camps; the growth of mass participation events such as Masters Games; and the growth in “manufactured” events- both made for television and made specifically to help promote tourism in the region.

Events and Cultural Tourism

Cultural tourism globally was estimated to be worth US\$214 billion and has significant potential for Tropical North Queensland given the rich cultural heritage of the region.

In recognition that TNQ was missing tourism opportunities due to a lack of engagement between the tourism and cultural sectors in the region, Tropical North Queensland Cultural Tourism Strategy was commissioned by Arts Nexus with funding support from the Australia Council Regional Arts Fund and DEEDI (formerly known as Department of Tourism, Regional development and Industry). Released in June 2009 this strategy provides the basis for ongoing development of this sector and tourism experience.

Some of the key Cultural Tourism Strategy recommendations included: -

- Establishment of an iconic regional museum
- Provision of more gallery space
- Improved information portals of events
- More production space for artists
- Fast track the cultural precinct development
- Create an entertainment precinct and up weight night-time entertainment
- Look to better present the Torres Strait culture alongside the other Indigenous cultures.

There is an extensive list of events throughout the region, many of which are localised activities. These are unlikely to draw significant numbers from outside the region but do provide additional colour to the regional experience of visitors who are in the region. As such they are not catalysts for visitation but do add to the experience.

There are few major events, and this is an opportunity that should be explored to identify the catalyst events that have the potential to drive increased visitation to the region.

Recent debate on the topic has identified such options as the solar eclipse festivals, music festivals, various sporting challenges including the eco-challenge and triathlons. All have merit but to maximize the opportunity a strategy regarding positioning and promotion of events and festivals needs to be developed.

Wedding and Honeymoon Markets

This is a segment that in the past has seen efforts in the Japanese market secure a large market share for TNQ, and be ranked in the top three destinations in Australia for honeymoons. Honeymooners from Japan in the three years to December 2007 accounted for 17 percent of Japanese visitors to Tropical North Queensland.

While the region has been focused on the overseas market it may have potentially overlooked the lucrative nature of the domestic wedding and honeymoon scene. The domestic market is worth \$110 million, and in addition to the 1500 couples who chose TNQ to wed, there are estimated to be a further 73000 wedding guests who visit to boost the economy.

Eco and Voluntourism

One of the most significant trends from the Northern American market and parts of Europe is the increase in volunteer or philanthropic tourism. The market is described as allowing travellers to enjoy the wonders of the destination while helping local communities and preserving the environment by participating in unique experiences, such as volunteering in orphanages or schools, rescuing wildlife and participating in local environmental protection activities.

There can be different levels of commitment, across all ages groups that have the potential and the interest. Indeed the mass market also has potential for philanthropic travel, with short volunteer activities built into holiday packages as well as focused volunteer holidays.

TNQ is well positioned to offer a range of programs that could appeal; including preservation of the reef and rainforest, to the turtle preservation program at Mapoon, or working with indigenous communities.

Examples could include the Cassowary protection program in and platypus and tree kangaroo preservation program in the Tablelands. All of this would be compatible with the traditional focus on the reef and rainforest and the various research and protection programs which already exist in these heritage areas.

The Education Sector

This is an area where the region has had some success across the tertiary, vocational, language, and secondary school sectors.

The attraction of school groups, from key markets such as Japan proved more difficult until recent times with the loss of direct flights from key Japanese cities, but the trends will provide opportunities for the region in the other sectors. Significantly the aging population focus on self-development including language skills is an area that could be pursued.

This sector has been promoted by Study Cairns, a sector driven cluster that has coordinated the regions promotion with limited support from other regional development bodies and government agencies.

A significant spin off is the Visiting Friends and Relative (VFR) visitation from long-term students. Traditionally a high yield market, the student's relatives and friends come to Cairns for various reasons and often numerous times. Increasingly the benefit of this sector will require a coordinated government and industry approach.

5 Investment Projects

Torres Strait

5.1 Core Tourism Precincts

For the purpose of this study it was determined that, with some generalisations, Tropical North Queensland could be broken into the following six tourism precincts:

- Cairns
- Atherton Tablelands
- Port Douglas and the Daintree
- Cassowary Coast/Mission Beach
- Cooktown, Cape York Peninsula and Torres Strait
- Gulf Savannah

5.2 Descriptions of Core Tourism Precincts

Cairns

The city of Cairns, for most purposes is defined by Gordonvale in the south and Ellis Beach in the north. Cairns city is situated along the foreshore of the Coral Sea and Trinity inlet. It is an established tourism destination of global significance and acts as the regions hub for tourism. Other destinations within Cairns include Palm Cove and Kuranda which have substantial existing tourism infrastructure. As a hub for the region it also is the key centre for tourism related industry including retail and business events. Equipped with an international airport and a busy cruise port with over 200 international and domestic cruise ship visits a year, Cairns provides the base from which many visitors explore TNQ. It hosts a wide variety of accommodation options ranging from backpacker hostels through to five star hotels. Tours to the rainforest and Great Barrier Reef depart daily from Cairns' major accommodation providers. A large number of community, cultural and tourism related festivals and events are also based in Cairns. It is also home to the Cairns Convention centre which has very good existing capacity and capability to host tourism related events. The recent redevelopment of Cairns foreshore 'esplanade' has incorporated excellent community space including pools, recreation and sporting facilities.

Atherton Tablelands

The Tablelands encompasses an area of more than 65,000 sq.km, including Kuranda, Atherton, Mareeba, Herberton, and the Outback areas of Chillagoe, offering visitors a combination of nature and Queensland lifestyle experiences. Among the World Heritage listed rainforests, national parks, mountains, rivers, lakes and waterfalls, the Tablelands is home to some of Australia's richest agricultural lands, cattle country and charming small townships. Visitors are presented with a multitude of opportunities for nature based and cultural activities such as bush walking, bird watching, limestone cave tours, wildlife tours, hot air ballooning, fishing, white water rafting; arts and craft markets and stores, old quaint townships and festivals. Accommodation options on the Tablelands include mainly classic old hotels, motels, guest houses, backpackers, farm stays, boutique style cottages and caravan and camping parks.

Port Douglas and the Daintree

Port Douglas is located approximately 70 kilometres from Cairns and is the second most visited township in TNQ. It provides its visitors with the opportunity to enjoy and relax in a laid back tropical oasis with sophisticated worldly comforts and a small friendly village atmosphere. Key activities include soaking up the sunshine on the beach, strolling among the village shops, galleries, and historic buildings, eating at some of the finest local produce at a variety of restaurants, and visiting the seaside Sunday market. Port Douglas's location provides a convenient hub for visitors looking to experience a trip out to the Great Barrier Reef or the Daintree and Cape Tribulation.

Cassowary Coast/Mission Beach

The Cassowary Coast stretches from Babinda in the north through to Innisfail, Tully and Mission Beach in the south. It's an area with stunning palm-fringed beaches surrounded by World Heritage Rainforest, clear flowing rivers and rare wildlife and flora. Wet and warm, the Cassowary Coast is yet another area in TNQ where the rainforest meets the reef, and is home to those who have escaped the hustle and bustle of city living to enjoy a tropical climate and laid back lifestyle. A significant proportion (37%) of Mission Beach area has protected status (World Heritage Area and through private conservation covenants) which provides its visitors with the strong possibility of seeing the elusive Cassowary.

Cooktown, Cape York Peninsula and Torres Strait

Cooktown, named after the legendary navigator and explorer 'Captain James Cook', defines its position in history with some of Australia's most significant geographic and civic monuments. Key experiences include learning about the history of Cooktown, its cultural and natural developments.

Cooktown is also the gateway to Cape York Peninsula; one of the most diverse and unspoiled travel destinations in Queensland. From Cooktown north, access is by dirt road suitable only for 4WD vehicles. Visitors to Cape York will experience some of the toughest terrain in Australia but will be rewarded with some of the most spectacular scenery. The Cape is an under-explored paradise with thousands of species of tropical birds, beautiful waterfalls and basking crocodiles. It also retains a long history of indigenous occupancy and is home to some of the world's greatest archaeological treasures. The sandstone escarpments of Quinkan country contain thousands of rock art sites in which is probably the largest and oldest collection of rock and art in the world.

Just north of the tip of Cape York lies the islands of the Torres Strait spanning the gap between Australia and Papua New Guinea. The Torres Strait offers its visitors the opportunity to experience and learn about the Torres Strait Islander unique culture whilst also taking in the magnificent scenery of crystal clear blue waters and sandy white beaches and cays.

The Gulf Savannah region incorporates the shire councils of Burke, Carpentaria, Doomadgee, Etheridge and Mornington. It offers its visitors miles upon miles of bushland and wide open spaces, spectacular flora and fauna, changing landscapes, World Heritage fossil fields, historic towns, aboriginal rock art, gemstones and gold. It has some of the best fishing in the world and the natural phenomena of meandering river systems, hot springs, lava tubes and deep gorges full of wildlife.

Gulf Savannah

The Gulf Savannah region incorporates the shire councils of Burke, Carpentaria, Doomadgee, Etheridge and Mornington. It offers its visitors miles upon miles of bushland and wide open spaces, spectacular flora and fauna, changing landscapes, World Heritage fossil fields, historic towns, aboriginal rock art, gemstones and gold. It has some of the best fishing in the world and the natural phenomena of meandering river systems, hot springs, lava tubes and deep gorges full of wildlife.

5.3 Suggestions for Investment

Taking into consideration the external impacts affecting Tropical North Queensland (TNQ) and the potential growth markets, the following list of catalyst projects have been developed based on an analysis of current and projected visitor demand data, a comprehensive review of the region's natural, cultural and built assets and an extensive consultation and review process with regional stakeholders.

Details of the catalyst projects are provided on the following pages and their regional dispersal is depicted on the map. The catalyst projects have been selected from a broader range of potential projects as representing the key tourism opportunities that, if implemented, would significantly contribute to maintaining and growing tourism in TNQ.

These catalyst projects, along with the following list of Precinct and Support Infrastructure projects provides a strong basis for guiding the ongoing development of a dynamic and sustainable tourism industry in TNQ.

5.4 The Catalyst Projects

As a result of research and consultations 18 catalyst projects are recommended for the region. These projects are tourism investment or associated infrastructure projects which are expected to act as a catalyst for a range of other investment, marketing and product development opportunities.

1 Cairns Arts, Cultural and Events Precinct	10 Torres Strait Islands Experience
2 Australian World Heritage Centre Cairns	11 Cape York Wilderness Experience
3 Port Douglas Waterfront Development	12 Great Green Way Nature Trail
4 Daintree Sustainable Tourism Gateway	13 TNQ Culinary Tourism
5 Welcome to Country Experience	14 Tablelands Accommodation
6 Education and Wellbeing Tourism	15 Cooktown Port and Marina
7 Clump Point Safe Boat Haven	16 TNQ Drive Tourism Private Public Partnership
8 Tablelands Adventure Cycle and Recreation Trails	17 Gulf Monsoon Centre
9 Barron Gorge Tourism Precinct	18 Gulf Barramundi Program & Discovery Centre





5.4.1 Cairns Arts, Cultural and Events Precinct

Opportunity:

Redevelop the Cairns CBD Foreshore, to include the new performing arts centre, regional gallery, museum facility and exhibition space.

Background:

A huge opportunity exists for TNQ to embrace and facilitate the growth of the events, arts and culture sectors considering its rich cultural heritage. The interesting and unique aspects of the region include the Aboriginal and Torres Strait Islander cultures along with the frontier pioneering heritage of this remote region. TNQ is also well positioned geographically as a central point for other key cultures of the ancient Gondwana region including Papua New Guinea and Indonesia and has close access and ties with South Pacific island cultures.

The project looks to also incorporate upgrades to the new cruise ship terminal and include pedestrian access and streetscape enhancements following the foreshore development between the reef fleet terminal and convention centre and connecting with the CBD. Establishing such facilities will enhance the cityscape and extend the foreshore development to include other opportunities for tourism related businesses. The facilities in the precinct should be designed to be multi-use so as to improve the region's ability to host major in-door and outdoor concerts and business and tourism events that will not only benefit the local community but also boost the tourism appeal and capability of the region.

The Precinct should be developed as an exemplar of tropical architecture and sustainable design so in time it will become a must see visitor icon and assist in strengthening Cairns' role as a world class tropical city.

Enhancing the capability and capacity of the convention centre as a destination for key business events and conventions is a critical element of this project. Convention and business events is a growing sector of the tourism market and it is widely recognised that the global appeal of the TNQ region and its position as a centre for scientific and cultural expertise make it an attractive and competitive proposition as a host venue for major events.

The inclusion of a museum into the precinct is seen as a critical element incorporating a range of themes including Aboriginal and Torres Strait Islander people and culture, pioneering history of the region including that associated with agriculture and fishing and the dual World Heritage Area status of the region.

The scope of the Arts, Cultural and Events precinct should not just be limited to new development in the proposed area. A holistic approach to positioning the City of Cairns should be adopted and existing infrastructure and street scapes should look for ways to link with the theme. Seasonal street art, sculpture and interpretive art space should be available throughout the CBD area along with a strong consideration for building capacity around event and festival infrastructure. In order to fully capitalise on this opportunity, a long term strategy for the hosting of events in the region should be considered so as to deliver a high frequency of events across all seasons.

The Cruise Ship industry is growing exponentially around the globe and the forecast for an increase in Australian journeys presents new opportunities for the TNQ region. Enhancements to the shipping terminal facilities should recognise the trend for increases in size of vessels into the future. Queensland is a sought after destination on cruising itineraries and Cairns is uniquely positioned to attract growth in visitation due to its natural attributes and existing and planned infrastructure. Further development of significant cultural experiences, festivals and events in the region also presents further opportunities as they are able to be incorporated into cruise itineraries. Port access is a possible barrier to entry and efforts to address issues such as channel navigation and depth should be addressed.



Bedarra Island

5.4.2 Australian World Heritage Centre Cairns

Opportunity:

Build a National World Heritage Centre in Cairns to showcase Australia's network of World Heritage listed properties with a particular focus on the Great Barrier Reef and Wet Tropics Rainforest. The centre would be a world class tourist interpretive and education facility that would also house research and management bodies aimed at providing a centre of excellence for visitor education and interpretation.

Background:

TNQ is already strongly placed as a centre of excellence in environmental management and proudly boasts two World Heritage Areas including the Great Barrier Reef and the Wet Tropics Rainforest. Approximately 2.2million visitors come to the region each year to experience the iconic Reef and Rainforest. The region is currently home to a number of management, education and research authorities including the Wet Tropics Management Authority (WTMA), Australian Reef and Rainforest Foundation (ARRF), James Cook University (JCU) and an office of the Great Barrier Reef Marine Park Authority (GBRMPA). These organisations are critical to guiding the sustainable management of TNQ's natural assets and have an established strong working relationship with the local tourism industry.

Potential sites for the Centre could include the Cairns Pier, the new Arts and Culture Precinct or the Smithfield Tourism Precinct.

The opportunity for regular educational experiences to be hosted within the Centre would add a unique learning element to the experience and attract patrons of all ages including the valuable international group education sector. This should not be seen as a competitive element to existing tours and attractions as the enhanced learning opportunities within the centre would encourage interest in real life experiences on the reef and in the rainforest. This would value add to the experience and create positive word of mouth recommendations of the regions attractions.

The preferred site of the Centre would be the Cairns CBD/Arts Cultural Precinct in close proximity to the critical mass of visitor accommodation and entertainment. The Smithfield Tourism Precinct is another possibility.



5.4.3 Port Douglas Waterfront Development

Opportunity:

Re-development of the Port Douglas waterfront as an exemplar waterfront precinct. The re-development will provide improved access, visitor experiences and opportunities for economic development and investment while preserving and extending the established strong environmental and community values that characterise Port Douglas

Background:

Port Douglas is one of the regions most iconic locations and is an aspirational destination for both the domestic and international markets. It is also the most accessible gateway to the Great Barrier Reef.

The waterfront as it currently stands is characterised by a distinctive mixture of open space, heritage buildings, and commercial maritime activity that while charming and picturesque, has been developed in an informal and generally ad hoc way over time. An opportunity exists to re-develop the foreshore in a manner that is sympathetic to the existing character of the town and the needs of the local community while delivering an enhanced and authentic North Queensland tourism experience.

The Cairns Regional Council has already developed and adopted a Port Douglas Waterfront Masterplan, the key elements of which include creating a more walker friendly precinct, a working waterfront, a quayside plaza, a swimming lagoon, redevelopment of Marina Mirage, a sustainable weekly market and tropical streetscaping.

Implementation of the Masterplan will greatly enhance the accessibility, connectivity and flow of the waterfront precinct better meeting the needs of residents, businesses and tourists alike and providing numerous opportunities for economic and social benefit.



Daintree River Crossing

5.4.4 Daintree Sustainable Tourism Gateway

Opportunity:

Create a Gateway precinct at the Daintree River crossing to better manage visitor access to the Daintree rainforest and to promote a sustainable tourism access model for the region. The Gateway would not only serve as an important arrival statement for the Daintree through the presentation of tourist information, interpretation and education messages, but also provide the basis for developing a sustainable visitor access strategy for the Daintree addressing issues such as controlling tourist vehicle numbers, public transport and park and ride options.

Background:

The Daintree region has long been positioned as an ecological and environmental wonder with its core principal being sustainability. The Daintree is not only a popular tourist destination with a strong sustainable tourism focus but it is home to a resident population, involved in a range of tourism and non-tourism pursuits, and a community passionate about a sustainable future for their home.

Access to the Daintree is via a vehicle ferry which by its very nature serves as an arrival statement for the Daintree and a measure of visitor/vehicle management. The ferry departure point on the south side of the Daintree River offers a unique opportunity to develop a gateway precinct to educate and inform visitors but also to better manage them. Visitor numbers to the region have been growing steadily over the past few years which has raised issues of delays at the ferry and overcrowding of the Daintree's road system and parking areas during peak tourist season. The opportunity exists to investigate options to better manage visitor numbers and peaks in the Daintree including use of the Gateway Precinct as a staging point for alternative Daintree tourism transport options.

Any sustainable tourism access plan for the Daintree would need to be developed as a partnership between the Cairns Regional Council, key State Government agencies, local and regional tourism operators and bodies and the local Daintree community.



Tjapukai Aboriginal Cultural Park

5.4.5 Welcome to Country Experience

Opportunity:

Establish Cairns as Australia's Gateway to authentic Indigenous experiences through integrated 'Welcome to Country' activity connecting visitors with Aboriginal and Torres Strait Islander people and their culture.

Background:

Cairns is the international gateway to Cape York, home to the largest concentration of Aboriginal people in Australia, and the Torres Strait, a predominantly Torres Strait Islander and Aboriginal community spread across 17 main islands between Cape York and Papua New Guinea. Cairns is uniquely placed to celebrate and present the rich culture of the Aboriginal and Torres Strait Islander peoples through a range of initiatives including:

- Development of a 'Welcome to Country' theme that would be incorporated into the Cairns brand and be presented through appropriate signage and presentations at key locations like the airport, cruise ports, railway stations, Visitor Information Centre and hotels. Consideration should be given to the presentation of ceremonial 'Welcome to Country' performances to coincide with key events and at high visitor traffic areas in the region so as to better connect with mainstream regional visitors. There should be investigation into the potential role the Yarrabah community could play in the 'Welcome to Country' program.
- Re-development of the Tjapukai Aboriginal Cultural Park in Cairns as a key 'Welcome to Country' location in the city where domestic and international visitors could experience Aboriginal culture first hand through immersing themselves in authentic cultural sharing experiences.
- Development of a major Aboriginal and Torres Strait Islander precinct within the proposed Cairns Arts and Culture Centre presenting art, artifacts, displays and live performances and serving as another key 'Welcome to Country' location in the city.
- Development of the Mossman Gorge Gateway Centre ecotourism facility which will provide for better management of vehicle and people movements in the gorge, more effective protection and interpretation of Indigenous cultural and environmental values, provide a tourist economy and jobs for gorge residents, improve the tourist experience and in general improve the lives of the gorge community. The project would also serve as another key 'Welcome to Country' location in the Cairns area with authentic engagement involving traditional owners on their country.
- Development of the 'Dreaming Trail' project connecting the cultural experiences and people of the Cairns to Cape York region through the concept of an epic frontier journey, a once in a lifetime tourism expedition for global experience seekers. The Trail would be developed over time as an experience with a strong focus on Indigenous connection to country that links key hubs and communities with journey elements including walks, drives, flights and or sea voyages.



5.4.6 Education and Wellbeing Tourism

Opportunity:

Establish Cairns as a global centre for education, volunteer and wellbeing tourism where domestic and international visitors, particularly through the non-tourist season, could come to learn about the reef, rainforest and the tropical sciences, experience these learnings through tours and volunteer programs, participate in holistic health programs and undertake more traditional medical procedures and recuperate in the relaxed setting and climate of tropical North Queensland.

Background:

The Cairns and Tropical North Queensland region is uniquely positioned to attract new visitors through the provision of a range of educational, volunteer and wellbeing experiences. The identified centres' of excellence in the region for tropical sciences, reef management, conservation and rainforest research combined with the natural wonders of the region and an attractive climate, position TNQ as an area of significant interest to provide a broad range of education, volunteer and wellbeing programs. Another key attraction of the region is a strong existing supply of attractions, facilities and accommodation to support such new programs. The region also experiences large seasonal variations in visitor numbers which means that an opportunity exists for growth of long stay tourism during low and shoulder seasons. A number of investment opportunities, infrastructure projects and planned destination development activities would need to be coupled with more focused marketing efforts to present these regional experiences. Opportunities to consider include:

- Development of facilities and infrastructure supporting long stay tourism whereby international visitors would be enticed to leave their normal life in the northern winter for a period (1-4 months) over the tropical summer season and come to the region to enrich their lives.
- Further investment in infrastructure and ongoing course development of university and TAFE facilities to cater to short term education that can be experienced in 'holiday bites'.
- Utilisation of existing and development of futuristic conference and meeting infrastructure in existing hotels to create suitable learning environments for tourists.
- Refurbishment and repositioning of current tourism related infrastructure and assets to support medical and wellbeing tourism growth.
- Repositioning and upgrades to the current reef fleet operators to become floating centres of education or to deliver specific voluntourism product.



5.4.7 Clump Point Safe Boat Haven

Opportunity:

Establish a safe boat mooring haven at Mission Beach in order to encourage growth of recreational boating and tourism in the region which in turn will provide a sound basis for attracting further commercial tourism development to the area, generating economic and social benefits for Mission Beach and the wider community.

Background:

Clump point is located at North Mission Beach and is the access point for boating to the magnificent islands and coastlines of the Cassowary Coast. The region's boating industry is currently serviced by a jetty and a boat ramp pontoon which are unfortunately unable to manage the growing traffic or are unsustainable for certain weather conditions.

The tourism industry within the region is growing and the islands and coastline between Dunk Island and Hinchinbrook are of significant interest. Recreational boating is a key experience of the region and commercial boating for fishing, island hopping, diving and snorkelling, and sightseeing are growth sectors of the industry.

The current boating access facilities at both the Clump Point jetty and Clump Point boat ramp are barely able to support the current boating needs of the community and tourism industry. The design of these facilities also causes a number of environmental and human safety issues with the lack of suitable poor weather access being a key issue. Development of a safe and environmentally sustainable marina/ boating haven facility represents an opportunity for sustainable growth of tourism within the region and is also critical in protecting the existing industry on the mainland and islands of the region.



Bike tracks, Atherton Tablelands

5.4.8 Tablelands Adventure Cycle and Recreation Trails

Opportunity:

Establish a network of multi use trails for mountain biking, hiking and walking throughout the Tablelands region. A 'hub and spoke' model with specific offerings around each of the towns in the region linked to each other with extended trails between them would maximize the recreation and tourism opportunities for both locals and visitors and share the economic benefits across the region. A diverse range of experiences and trail levels will ensure sufficient variety to position the Tablelands as a world class destination, and potentially encourage visitors to stay longer in TNQ.

Background:

Sports and Recreation tourism offers an opportunity for diversification of the TNQ experience. Research has shown that cycling, hiking and mountain biking are some of the leading growth sports in the world for participation. The geography and access of the Tablelands region is well suited as a host destination to support cycle sports and major events in the region such as the Crocodile Trophy, H&H and the Tour de Tablelands.

The establishment of a series of cycling and hiking hubs through the region (incorporating the Atherton, Mareeba, Milla Milla, Herberton and Milanda townships) has the potential to increase the regional dispersal of visitors and extend average length of stay. The design of integrated recreational tracks and trails with a specific focus on mountain biking and hiking would provide a strong tourism focus for the Tablelands that would connect with all the towns of the region and provide economic benefit for the future.

The region has a number of unique aspects that lends itself to recreational experience trails, including accessible mountain terrain and great scenery, comfortable climate, ease of access to Cairns, strong community support and expertise along with some pre-existing base infrastructure. Development of nature based recreational tourism trails would provide strong support to existing township businesses along with the creation of new industry opportunities for accommodation, bike hire and other tourism related service requirements.



5.4.9 Barron Gorge Tourism Precinct

Opportunity:

Further develop the Barron Gorge Tourism Precinct in a sustainable manner leveraging off its close proximity to the Cairns tourism hub and key local heritage, pioneering, adventure, and nature-based experiences. The aim is to encourage visitors to spend more time and money in the precinct, thus providing increased economic and social benefits to the local community.

Background:

The Barron Gorge and Kuranda are in close proximity to the Cairns tourism hub, providing accessible and sustainable nature-based experiences to over 700,000 visitors per year. Barron Gorge National Park is one of the spectacular geographical features of the Wet Tropics World Heritage Area providing stunning waterfall and rainforest vistas and a fascinating network of Indigenous cultural heritage and historic trails. The area is also rich in a diversity of natural, cultural and historic assets that offer the potential for a range of other tourism opportunities.

Currently, visitors are transported to Kuranda by iconic tourism attractions such as the Kuranda Scenic Railway and the Skyrail Rainforest Cableway or by road up the scenic Kuranda Range Road. Current visitation patterns tend to be driven by the train and Skyrail timetables resulting in a tourism community that experiences high levels of daytime visitation between 9.30am and 3.30pm. Consequently, there is scope for visitor growth outside of these times and opportunities to develop new and diverse experiences, so as to capture a greater level of repeat visitation and to extend the visitors length of stay in region.

Any future development would need to encompass strong sustainability credentials, and reflect the established environmental and cultural character of the area and the aspirations of the local community.

Key development opportunities could include attractions of historical and pioneering interpretation and nature based adventure activities. The Barron Gorge could be accessed and showcased in unique ways and the existing trails network could be developed to attract more adventure based visitors, with the region establishing itself as a natural staging area for adventure sports, events and festivals.



Island in Torres Strait

5.4.10 Torres Strait Islands Experience

Opportunity:

Develop a sustainable tourism experience for the Torres Strait Islands that respects nature, culture and history, is at a scale that reflects 'island life' and is in keeping with the aspirations of the resident community. This experience will be achieved through the development of a number of initiatives including:

- an enhanced network of island accommodation facilities,
- island attractions and tours that celebrate the region's stunning environment and unique Torres Strait Island culture and history,
- an island cruise shipping and boating network, and
- an integrated booking and visitor information system.

Background:

The Torres Strait Islands is home to some 8000 permanent residents on 17 main islands spread across some 48,000 square kilometers between Cape York and the mainland of Papua New Guinea. The islands and their surrounding waters and reefs provide a diverse set of land and marine ecosystems and possess a rich culture and history that could form the basis of a unique and authentic island tourism experience. Accommodation, attractions, tours and associated commercial enterprises would be based on experiencing the daily island life of a 'living culture' and its history through fishing, bird-watching, diving, boating, art, craft, dance and historic interpretation of culture, pearling and the impacts of World War II.

The islands of the Torres Strait possess their own unique story and tourism opportunities, but experience very low tourism numbers due to a number of factors including lack of product and industry development, limited accommodation, access challenges and low market awareness. The Cape York Peninsula and Torres Strait Tourism Development Action Plan 2008 provides the blueprint for addressing these and associated issues and establishing a sustainable tourism future for the Torres Strait.



5.4.11 Cape York Wilderness Experience

Opportunity:

Develop a uniquely Cape York sustainable tourism experience that celebrates the region's environmental, cultural and landscape values through the implementation of the following key initiatives:

- Re-development of Pajinka Resort and the wider 'Tip' experience
- Implementation of the Cape York Camping and National Park Tourism Framework with the aim of establishing a network of camping and accommodation opportunities and associated attractions and tours across the Cape.
- Implementation of other key actions in the Cape York Peninsula and Torres Strait Tourism Development Action Plan dealing with infrastructure, product and industry development, coordination and marketing.
- Establish the 'Dreaming Trail' concept across Cape York where environmental and cultural values are presented and experienced at tourism nodes and along tourism trails (walking, road and sea) and where there are opportunities for authentic engagement with Indigenous people.

Background:

The Cape York region between Cooktown and Bamaga offers a remote wilderness tourism experience through a richly diverse natural and cultural landscape. It is one of the unique and iconic Australian adventure journeys.

Current visitation to Cape York is dominated by mature aged Australians with international tourists representing less than 10% of the market. Over 80% of domestic visitors to the Cape use their own vehicle with the remaining domestic and international visitors using hire vehicles and commercial tour operators with only a very small proportion using air and sea.

The current attraction of Cape York revolves around its isolation, open spaces, unspoilt environment, spectacular scenery, fishing and the sense of adventure at escaping from the everyday hustle and bustle. Into the future Cape York has the potential to build on these attributes and attract a broader domestic and international visitor market looking for a true adventure wilderness experience and authentic engagement with Indigenous Australians.

Cape York represents a unique opportunity for TNQ and Queensland to present itself to the world as having one of the last great wilderness adventure and cultural experiences - and tourism represents a valuable economic, social and environmental opportunity for the Cape York community. The Cape York Peninsula and Torres Strait Tourism Development Action Plan provides the blueprint for realizing the great potential of tourism on Cape York as a partnership between all levels of government, industry and the Cape York community.



Flightless Cassowary

5.4.12 Great Green Way Nature Trail

Opportunity:

Establish an integrated Great Green Way Nature Trail providing a network of drive, hiking, kayaking, cruising and sailing experiences, building on the spectacular natural attractions and landscapes of the region. The network will provide a stronger and more diverse connection of local attractions via land and sea by capitalizing on existing visitation, promoting greater visitor dispersal from the tourist hub of Cairns and providing a stronger basis for the further growth in tourism facilities and services along the Great Green Way.

Background:

It is recognized that one of the keys to sustaining the long term health of tourism in TNQ lies in evolving and presenting new, exciting and immersive visitor experiences more broadly across the destination. This approach will assist in dispersing visitors more widely throughout the region thus increasing length of stay and expenditure, with the increased diversity and scope of opportunities heightening the potential for repeat visitation. The Great Green Way is a key component of the TNQ story that can assist in achieving this aim.

The Great Green Way is the region between Cairns and Townsville covering a distance of 457km along the North Queensland Coast and encapsulating some spectacular natural attractions which are not well known. The route has some established tourism centres along the way in Mission Beach and the Cardwell/Port Hinchinbrook with natural attraction highlights including Hinchinbrook Island National Park, The Family Group of Islands, Wallaman Falls, Tully River, Wet Tropics Rainforest, and the Paluma Range. The region is rich in flora and fauna along with some iconic cultural and heritage highlights.

There are opportunities for the further development of tourism services and facilities at the two key townships of Mission Beach and Cardwell/Port Hinchinbrook including eco-accommodation options and transport interconnectivity that provides regular access to the key natural attractions. The establishment of a coastal ferry/cruise services operating between Mission Beach and Cardwell are options that would take visitors through some largely unseen island waterways. Daily tours running from the hub centres to iconic waterfall and river/creek attractions would be natural extensions to these opportunities. Linking all the experiences into a self-drive and commercial tour trail would assist in realizing the true potential of the Great Green Way and provide the Cairns market with a stronger southern nature-based tourist destination.



5.4.13 TNQ Culinary Tourism

Opportunity:

Capitalise on TNQ's unique and abundant local produce, grown in a clean green environment, by including local food as an integral part of the TNQ experience and competitive advantage and in the longer term positioning the region as one of the great food travel destinations of the world.

Background:

The Tropical North Queensland region has an abundant and diverse agricultural industry that is unique from many other areas of the world. Produce heroes include the seafood of the Gulf, rivers and Coral Sea like mud crabs, coral trout, barramundi and prawns, and an abundance of exotic tropical fruits. The region has a strong history in producing staples such as coffee, tea and sugar, and there is a growing organic food movement in the region with dairy and organic meat production flourishing. A number of relatively mature food tourism products exist in the region including markets, coffee centres, dairy storefronts and an array of exceptional restaurant precincts.

The TNQ region is a key tourism destination that has been built on the natural icons of the the reef and rainforest. Food experiences can be an international draw card attraction in their own right or a very powerful attraction to underpin the quality of experience within a region along with extending the stay of visitors and their level of expenditure.

An array of opportunities exist to give the region the critical mass of food tourism experience needed to establish itself as a standalone food destination. These include; more regular markets, farmgate trading and retail opportunities, farmstays, events and festivals, 'paddock to plate' initiatives and the establishment of a food brand with distribution networks and export potential.



Fur n Feathers Rainforest Tree Houses, Tarzali

5.4.14 Tablelands Accommodation

Opportunity:

Improve the appeal and average length of stay of visitors to the Tablelands by establishing more and varied accommodation options including:

- Mid scale hotel.
- An eco lodge facility located in the Southern Tablelands and.
- Backpacker friendly accommodation.

Background:

Tourism in the Tablelands is currently seen as predominately a day trip proposition out of Cairns which limits the region's ability to gain the full economic benefit from overnight visitation and further develop its tourism potential. This predominance of daytrippers is not because there is a lack of attractions and things to see and do on the Tablelands, but because there is a lack of and variety of accommodation in the region. The accommodation that is available is dominated by caravan parks and bed and breakfasts, which service a predominantly domestic self drive market. During peak times of the year it is not uncommon for Tablelands accommodation to be booked out especially on weekends.

With the strong and varied mix of domestic and international tourists in Cairns and the growing number and variety of tourism opportunities on the Tablelands, there is scope for the region to establish itself as an overnight destination. This can only occur if there is an increase in the number and range of tourism accommodation options. Key identified opportunities include:

- A mid scale 3-4 star hotel that can service the traditional tourist market, conferences, events, weddings, education groups and the like, connected to an existing tourist attraction in Atherton or Mareeba region;
- A 5 star eco lodge/ resort facility located in the Southern Tablelands allowing visitors easy access to the areas natural assets and servicing the key higher yield international and domestic markets;
- A range of affordable backpacker friendly accommodation that can ensure sufficient lodgings are in the region for the travelling youth adventure market and working holiday agricultural workers.



5.4.15 Cooktown Port and Marina

Opportunity:

Further enhancement and development of the Cooktown Port and Marina with an increase in mooring capacity, additional accommodation facilities, maintained port access and retail opportunities including dining and cultural arts offerings. This would increase Cooktown's accessibility and appeal to the Cruising industry (a huge growth market for Queensland) and enable the town to capitalize on established tourism activity associated with fishing, local attractions and access to pristine areas of the reef for dive and expedition journeys.

Background:

Cooktown is a unique and historically significant destination. It is the last major township before entering Cape York and is surrounded by a number of spectacular attractions including the Black Mountains, Endeavour River, Lakefield National Park, Laura and Mount Cook. The region provides a great base for access to some untouched areas of the Great Barrier Reef, discovering Australia's history, connecting with Indigenous art and cultural sites and for some fantastic fishing opportunities.

The region is largely serviced, at present, by road access and reaches capacity easily across the peak months from June to September. The port is a haven for recreational fishing, sail and cruise boats and cruise ships travelling north to Cape York and the Torres Strait. The development of access to the region by air and sea is key to the further development of the area's tourism potential and critical to this happening would be further development of the Cooktown Port and Marina facilities.



5.4.16 TNQ Drive Tourism Private Public Partnership

Opportunity:

Improve investment in and development of facilities and businesses servicing the drive tourism sector in Tropical North Queensland by encouraging Private Public Partnerships (PPP). This will in turn raise the quality and presentation of these tourism facilities servicing the drive tourism sector.

Background:

Drive tourism in Queensland is worth approximately \$4.5 billion to the states economy and is very important to regional centres which attract on average 70% of the total visitation in this sector. Visitation is predominately from the domestic sector with a high weighting of intra regional visitors, which in TNQ come from the 600km radius around Cairns. The recent global downturns have highlighted the vulnerability of the region and the drive tourism sector has shown growth in this period. Drive tourism is also largely protected from the vagaries of the region's airline access issues.

The attractions of the region are renowned and this equates to generally strong demand for a drive visit into North Queensland. Sustained marketing activity will continue to support this. On the supply side, there is a critical mass of tourism services and van parks that are heavily booked throughout the peak periods. There are also a number of council operated facilities that are in variable condition and are not realising their full potential due to commercial limitations.

The opportunity exists to look at a structure of Private Public Partnerships (PPP) in the region to improve investment and development of these facilities and raise the quality and presentation to an ever discerning drive market. To accompany this, a level of investment by local councils in appropriate ancillary services for this industry should be considered to allow improved integration of caravan holiday makers into CBD areas. The net benefit of this would be higher yields, increased length of stay and an enhanced confidence and reputation for the region in this growing sector. Infrastructure development will support economic benefit for city centres by attracting tourists into the heart of the tourism hubs.



Old Burns Philp Building

5.4.17 Gulf Monsoon Centre

Opportunity:

Develop the Gulf Monsoon Centre in Normanton as a must see visitor attraction and experience, telling the story of the wet season and its impacts on the people and landscapes of the Gulf.

Background:

Most visitors to the Gulf come during the dry season either travelling through on the Savanna Way or staying to take advantage of the region's renowned recreational fishing opportunities. Most have little knowledge or understanding of how the landscape, ecology and accessibility of the region changes in the wet season and the impact it has on the lives of its residents.

The Gulf Monsoon Centre will be incorporated into the historic Burns Philp building in Normanton which currently houses the town's Visitor Information Centre. The Centre will 'enGulf' visitors in the wet season experience by highlighting the weather drivers of the monsoon and their influences on the landscape, people, fish, birds, other animals and plants. The monsoon experience will be delivered through a range of interpretive media including photos, graphics, models, videos of locals and their stories, dioramas and touch screens. In addition, the monsoon experience will link to the nearby Mutton Hole Wetlands and Norman River both a short walk from the Centre providing a value outdoors element to the whole wet season story.

The Centre will not only provide an informative and entertaining presentation of the monsoon season and its affects but will provide visitors with a much needed additional key attraction in the region and more effective orientation of other things to see and do in the region. In this way, it is hoped that the Centre will encourage people to stay longer in the region and deliver greater economic benefits from visitors.



Norman River Floodplain

5.4.18 Gulf Barramundi Program & Discovery Centre

Opportunity:

Further development and support of the Barramundi Discovery Centre in Karumba as a valuable visitor experience but more importantly as the only fish hatchery in the world that breeds the southern Gulf barramundi for release into the rivers and lakes of north-west Queensland in support of the region's commercial and recreation fishing industry.

Background:

The Barramundi Discovery Centre based in Karumba has the dual role of providing visitors to the region with a comprehensive story of the Barramundi and the unique Karumba environment while at the same time breeding barramundi fingerlings for release into north-west Queensland rivers and lakes.

The Discovery Centre has a range of displays and offers tours of the centre that celebrate all things 'barramundi' and the vital work of the centre in breeding barramundi fingerlings for release. A highlight of the tour is the feeding of the breed stock of barramundi in their tanks.

However, the key role of the centre is the breeding for release of southern Gulf barramundi fingerlings, a vital cog in sustaining the region's commercial and recreational barramundi fishing which is the mainstay of the regional economy. Over the last 15 years the Centre has breed in excess of 1 million fingerlings which have been released into rivers and lakes in areas across the north-west including Normanton, Burketown, Richmond, Croydon and Mount Isa.

The Centre operates on a non-profit basis relying on the sale of fingerlings for release, centre tours and a range of fund raising activities. Considering the important role the centre plays in underpinning the region's fishing industry and the potential for it to serve as a must see visitor experience, there is a need to source substantial development funding and more secure operational resources. It is recommended that external grant and corporate funding be sourced to upgrade the Centre facilities as a world class tourist and breeding centre which will provide a stronger basis to generate sufficient income to support the centre's dual tourist/breeding role.

5.5 Precinct Tourism and Support Projects

Investment in tourism products and related infrastructure is required in order to meet the future needs of visitors to the regions. Provided below is a summary of additional tourism related development projects from across the region that have considerable merit for further investigation.

Cairns Region		
Project	Description	Comments and Conclusions
East Trinity	Implement the works recommended in the East Trinity eco tourism precinct master plan Pre-Feasibility study	<ul style="list-style-type: none"> ■ Close proximity to Cairns CBD ■ Potential employment and management role for indigenous Traditional Owners ■ Increased interest in eco tourism creates opportunity ■ Potential to meet a need for half day tour option from Cairns CBD
Cairns Water Park development	Development of a purpose built water park	<ul style="list-style-type: none"> ■ Cairns Regional Council has approved the development of a water park at Smithfield. ■ The water park will appeal to both the tourist market and local residents.
Tropical Paradise Resort	Tropical Resort Developments Pty Ltd proposes to establish a themed entertainment and tourist precinct, known as Tropical Paradise Resort, 18 kilometres south of Cairns. The proposal would incorporate a range of elements including a major theme park and film studio, a water park, resort hotels and a mix of short stay accommodation, village centre and themed retail, golf driving range and extreme sports complex.	<ul style="list-style-type: none"> ■ Substantial investment which will be required to go through an extensive consent process ■ Securing necessary regulatory approvals is likely to be difficult ■ Detailed investigations need to establish that the development will not undermine the overall regional tourism 'offer'
Cruise Ship Terminal	Capitalise on the \$10m investment in the terminal by identifying multi purpose uses for terminal facility.	<ul style="list-style-type: none"> ■ Upgrade works have already commenced and are due for completion in late 2010 ■ Upgrade works and future improvements have the potential to provide cruise ship visitors with a positive and lasting impression of their visit to the region ■ Clear synergies with other projects in the area, including the Cairns Cultural Precinct
'Reclaiming the Inlet'	Extension of Marina waterside boardwalk from Hilton Hotel to Cruise terminal	<ul style="list-style-type: none"> ■ This will be an essential part of linking the city with the up graded cruise terminal, and the planned development of the cultural precinct towards the convention centre. ■ The eventual development of a dining/ café/entertainment precinct would be a boost to the city.

Cairns Region		
Project	Description	Comments and Conclusions
Marine Training College	The establishment of an inshore craft training simulator and maritime safety facility at the Great Barrier Reef International Marine College. The total project will cost \$8 million. The Marine Training College will be a one-stop-shop for marine training for the region.	<ul style="list-style-type: none"> ■ There is enormous demand for the facility in Cairns ■ Currently, deckhands and other trainees have to travel to Brisbane or Sydney to do water-based simulated safety training. ■ The inshore craft simulator will be for training on boats, barges, catamarans and tourist charters - training that is currently undertaken in Freemantle in WA. ■ The marine sector is vital to Cairns and Far North Queensland with growth opportunities in training and education, defence shipbuilding, port expansion and marina expansion. ■ Outside of Sydney, Cairns is the most visited port for major cruise ships.
Health and Wellness facilities/ Long Stay Facilities	Develop a range of targeted specialist medical service facilities that be established. The creation of critical mass will attract medical staff and investment that will also benefit the local community.	<ul style="list-style-type: none"> ■ Fast tracking of the base hospital upgrade is required. ■ Development of new clinics relevant to the identified services. ■ Potential modification of existing accommodation facilities to cater for the "tourist" receiving medical treatment.
Port Douglas and Daintree		
Daintree River/Bloomfield Track road upgrades	The Daintree area should be promoted as a year round destination but upgrades to road infrastructure are required to increase levels of flood immunity	<ul style="list-style-type: none"> ■ Cairns Regional Council has already committed substantial resources to upgrading a number of creek crossings ■ Further studies have been commissioned to investigate improving access along the Bloomfield Track ■ Connections to the aboriginal community of Wujal Wujal and on to Cooktown are important for both tourists and local residents. ■ Mechanisms to provide visitors with real time access information (disruption of ferry services, flooding, etc) such as SMS alerts should be explored and introduced.
Mossman Gorge Gateway Project	The Mossman Gorge Gateway Project will be a nationally-significant ecotourism facility designed to provide world class tourism experiences to the hundreds of thousands of people who visit the Gorge annually. The project involves the construction of a modern visitor centre that will provide parking for 200 vehicles, specialised bays for tourist coaches, a café, art gallery and gift shop, cultural displays, guided walks and a venue that can be hired out for conferences and functions.	<ul style="list-style-type: none"> ■ \$16M dollar investment, generating 40 new local jobs immediately when the centre opens for business and up to 70 new jobs in the peak tourism season. ■ Will assist in the management of the large volume of visitors travelling to the gorge ■ Economic opportunities for the local indigenous community.
Mowbray River Enviropark	The Mowbray Falls Enviropark concept involves the development of an ecotourism development that is intended to be a benchmark for sustainable tourism development. The development will involve the construction of a Restaurant, Interpretive Centre, Canopy Walkway, Seminar Centre, Unit & Villa accommodation and Freshwater Ecological Centre.	<ul style="list-style-type: none"> ■ Located in close proximity to the key tourism node of Port Douglas ■ Unique and accessible rainforest location ■ A number of regulatory approvals have already been secured.

Port Douglas and Daintree		
Project	Description	Comments and Conclusions
CREB Track	Iconic 4WD driving track from Daintree village to Wujal Wujal. The CREB Track was the service access track for the old Ergon Energy powerline to Cooktown. It traverses a spectacular yet sensitive part of the Wet Tropics World Heritage Area from the Daintree River through China Camp to Bloomfield.	<ul style="list-style-type: none"> The track traverses some private property and Wet Tropics World Heritage area The future maintenance of the track and the provision of access need to be clarified and secured. Opportunities to 'package' the route with other 4WD drives, such as the Bloomfield Track Bush camping facilities and other low key tourism accommodation facilities could be provided and realise commercial opportunities
Harbour Dredging	Dredging of Port Douglas Harbour on a regular basis	<ul style="list-style-type: none"> The harbour hosts a large proportion of the reef fleet for the region Recreational fishing also an important element of the local tourism industry
Port Douglas Water Supply	Critical to ensure adequacy of supply, and quality of water for the future.	<ul style="list-style-type: none"> Concerns have been expressed locally at the ongoing quality of the water supply to Port Douglas and surrounding settlements
Cooktown to Cape York		
Road maintenance and access to gravel/water resources	Road maintenance and access to materials such as gravel and water for local councils are critical to ensuring satisfactory road access to the Cape.	<ul style="list-style-type: none"> Agreements between local councils and DERM need to be reached to ensure access to gravel and water resources, particularly in National Parks. Road closures should be minimised so that opportunities to extend the tourist season can be realised.
Quinkan Centre	Develop the Quinkan Centre as a benchmark cultural and visitor experience in Cape York	<ul style="list-style-type: none"> Explore commercial opportunities to improve revenue, such as camping and other ancillary visitor facilities Secure land tenure.
Facilities for Laura Dance Festival	The provision of facilities to support the Laura Dance Festival	<ul style="list-style-type: none"> Need to identify the range of facilities required to support the festival, such as toilets, camping grounds, etc Dual use of facilities to provide economies of scale and potential revenue should be explored.
Improvements to airport passenger terminals	Upgrades to passenger terminal facilities to provide basic amenities and improve the visitor experience.	<ul style="list-style-type: none"> Aerodromes commonly under the control of local councils
Waste management	The lack of a dedicated and coordinated network of waste disposal and management facilities causes environmental degradation across the Cape.	<ul style="list-style-type: none"> Need for coordinated action amongst local authorities Ranger programs across the Cape provide an opportunity for regular collection and management
Conservation works on WW2 installations on Horn Island	Horn Island has a rich heritage of features dating back to WWII. Installations are currently in varying states of disrepair and there is a need to conserve installations and provide for appropriate interpretation of facilities.	<ul style="list-style-type: none"> Preservation and interpretation of WWII installations could form the basis of an important visitor attraction. The impacts of the war on the islands have never received the same level of recognition as locations such as Darwin. Islanders played an important role in defence of Australia and sustaining the war effort.

Cooktown to Cape York		
Project	Description	Comments and Conclusions
Upgrade of Horn Island airstrip	Upgrading the Horn Island airstrip will allow larger planes to land at TI and potentially increase airline capacity and visitation.	<ul style="list-style-type: none"> Horn Island aerodrome is owned and maintained by the local council The current condition of the aerodrome has been an impediment to regional airlines looking to upgrade their aircraft fleet and increase capacity Improved air access has the potential to be a key driver in the future growth of tourists to the islands.
Atherton Tablelands and Accessible Outback		
Waterfalls Circuit (interp and facilities)	Opportunities to provide additional interpretation and other ancillary facilities on a popular waterfalls circuit.	<ul style="list-style-type: none"> An easy, enjoyable drive along the back roads around Millaa Millaa to three picturesque waterfalls. Short walks lead to viewing areas and swimming holes at Millaa Millaa, Zillie and Elinjaa waterfalls. Millaa Millaa Falls is a very well recognised natural attraction on the Atherton Tablelands.
4WD driving trails	The development of a series of signed 4WD driving trails across the Atherton Tablelands that showcase the rich diversity of landscapes and strong mining heritage of the area.	<ul style="list-style-type: none"> Waterfalls circuit has good linkages with adjacent national parks and other attractions (such as Ma:Mu canopy walk in the Palmerston Highway corridor). The Atherton Tablelands contains an extensive network of trails and roads that are suitable for 4WD driving. The area has a strong pioneering and mountain heritage that can be showcased by a network of properly signed and packaged 4WD trails.
Track maintenance for KSR	The Cairns Kuranda Railway is principally a tourist oriented rail tour between Cairns and Kuranda. Due to the prevailing terrain through which the route passes, an extensive program of evaluation and maintenance of infrastructure is required to reduce the risk of unforeseen closure, particularly following significant rain events.	<ul style="list-style-type: none"> There are two services from Cairns to Kuranda daily, leaving at 8:30am and 9:30am, with two return journeys each afternoon, leaving at 2:00pm and 3:30pm. The trip is 34km and takes approximately 1hr and 45 mins. This section of railway is also used to transport sugar syrup from the Arriga Sugar Mill to Babinda for further processing Closures of the line result in significant impacts on the Kuranda tourism industry
Mareeba airport	Upgrade of Mareeba airport for general aviation and recreational services	<ul style="list-style-type: none"> Mareeba Aerodrome is owned and operated by Mareeba Shire Council. Its main runway is a sealed 1,505m strip. The aerodrome currently supports a range of general aviation businesses that service clients across northern Australia and PNG including recreational activity such as scenic flights, ballooning and parachuting. Mareeba Shire encouraged expansion of facilities on the airport over recent years by developing and making available areas for lease. A strategic plan for the future development of the airport has been developed in partnership with Tablelands Regional Council and the Queensland Government.

Atherton Tablelands and Accessible Outback		
Project	Description	Comments and Conclusions
Wind Farms	There are a number of proposals on the Atherton Tablelands to provide wind farms. These facilities provide the opportunity to showcase the use of renewable energy resources to visitors and could amount to a tourism attraction in their own right.	<ul style="list-style-type: none"> Potential visitor facilities should be factored in to the planning and design of wind farms.
Mount Mulligan - low key accommodation/tours	Opportunities exist for low key tourism accommodation and indigenous cultural tours and other historic interpretation of the area.	<ul style="list-style-type: none"> Mountain Mulligan is a stunning landscape with particular cultural significance of the local indigenous population. It is one of the oldest inhabited places in the state.
Cassowary Coast		
Kirrima Range Road	Scenic range road leading to the stunning Blancoe Falls and on to the Tablelands which has potential as a dedicated tourist drive	<ul style="list-style-type: none"> The area is also rich in mining history Relatively short drive time from Cairns Road currently closed by the Cassowary Coast regional Council Ongoing maintenance of the road has been an issue over many years The road provides access to attractive areas of the Wet Tropics World Heritage Area.
Art Deco inter in Innisfail	Develop Art Deco positioning for Innisfail.	<ul style="list-style-type: none"> Establish an art and design precinct dedicated to the Art Deco period Promote associated Art Deco exhibitions, and festivals dedicated to the fashion, and entertainment of the era.
Commercialisation of Ma:Mu canopy walk	The opportunity/benefit of transferring management control to private sector should be considered to maximize potential of facility.	<ul style="list-style-type: none"> Substantial public money has been spent on the development of the canopy work Opportunities exist to develop commercial opportunities in partnership with the MaMu people Interim support should be given to DERM to make the development 'commercial ready'
Ninney Rise	Ninney Rise has been identified as one of seven locations around Queensland's for low key tourist development in or adjacent to protected areas.	<ul style="list-style-type: none"> The new infrastructure will be operated and built by private companies but it would remain under state ownership. The State will lease the facilities to private operators and invest the yearly income back into the same national park for continual improvement and conservation
Gulf Savannah		
Details of additional tourism related development projects for the Gulf region are provided in the Outback Zone (including the Gulf & Western Downs) Tourism Opportunity Plan.		

6 Implementation

Four Mile Beach

Tourism Tropical North Queensland, working in partnership with the Department of Employment, Economic Development and Innovation and Tourism Queensland, will be the key influencer in prioritising and advocating the implementation of the TNQ TOP. This partnership will need to work closely with Local Government, key State Government and Federal Government agencies and the tourism industry throughout the region to develop project recommendations and action groups.

The document has been produced following consultation with many local authorities and is designed to provide a set of priority projects for the destination. It will be critical that the process allows for a strong level of collaboration and that at all times the future needs of consumers and community are top of mind.

Policies developed by local authorities, including local government planning schemes, should be flexible and pragmatic in relation to new tourism development. Likewise, it is important that State Government agencies recognise the importance of tourism to the state and regional economy and adopt policies that encourage and foster the implementation of sustainable tourism projects. This approach will provide for a more balanced policy environment which will promote best practice projects in a timely manner and be more conducive to attracting prospective investors while all the time recognising the need to ensure projects meet the highest environmental and community standards.

Key research sites:

www.tq.com.au
www.queenslandholidays.com.au
www.australia.com
www.cairnsgreatbarrierreef.org.au
www.tpdd.com.au
www.savannahway.com.au
www.missionbeachtourism.com
www.cooktownandcapeyork.com
www.tablelands.org
www.kuranda.org
www.tourismpalmcove.com

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