Townsville
North Queensland
Tourism Opportunity Plan
2009 – 2019
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Executive Summary

This Regional Tourism Opportunity Plan

The Tourism Opportunity Plan (TOP) provides direction for the sustainable development of tourism in the Townsville North Queensland region over the next ten years to 2019.

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 providers and private investors.

The audience of the Plan 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.

Catalyst Investment Projects

As a result of research and consultations 13 catalyst projects are recommended for the region:
- Greater Townsville CBD Tourism Precinct;
- Townsville Cruise and Military Ship Terminal;
- Townsville Business Events Centre;
- Townsville Artificial Reef;
- Magnetic Island as a Sustainable Destination;
- White Mountains National Park Wilderness Camping and Walking;
- Palm Island Adventure Trek;
- Wallaman Falls EcoResort;
- Off-road Adventure Park;
- Tourist Parks Cluster;
- Coast and Islands Boating Trail;
- Indigenous Rock Art and Relics Trail; and
- Cromarty Wetlands / North Queensland Wetlands Network.

These projects are considered to represent a good cross-section of the region’s tourism values with a balance between ambition and realism for future development.

Key Infrastructure Challenges

Townsville North Queensland benefits from generally excellent infrastructure. However some major gaps exist that impede the development of tourism in the region. Key infrastructure challenges for the future of tourism in Townsville North Queensland have been identified as:
- Upgrade of the Bruce Highway;
- All-Weather Roads to Tourism Destinations;
- Upgrading of the Gregory Development Road North of Charters Towers to Two Lanes of Bitumen;
- Upgrade of the Ferry Terminal at Palm Island;
- Master Plan for Intermodal Public Transport Connectivity in Townsville; and
- Boat Launching and Mooring Infrastructure Review.

Precinct Tourism and Support Infrastructure

An enormous range of tourism projects were considered in the preparation of this Tourism Opportunity Plan. In addition to the suggested Catalyst Investment Projects and Key Infrastructure Challenges an additional 36 Precinct Tourism and Support Infrastructure Projects from across the region are presented as having considerable merit for further investigation.

Next Steps

Townsville Enterprise, will be responsible for managing and co-ordinating the implementation of the Plan in partnership with Tourism Queensland and State and Local Government. Townsville Enterprise will monitor progress of the Plan’s recommended projects and where necessary assist in forming project groups of relevant agencies/organisations to take the project recommendations forward.

The TOP aims to provide a clear set of priority projects for the destination to guide product development partnerships and local planning. More importantly, the plan provides a vision and direction for future tourism development that meets the needs of the community and consumers alike.
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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 Townsville North Queensland region over the next ten years to 2019.

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 providers and private investors.

In November 2006 the Queensland Government launched the Queensland Tourism Strategy, a 10 year vision for sustainable tourism, which would be delivered under six key themes. Under Theme 2 ‘Investment, infrastructure and access’, Tourism Queensland, in partnership with Regional Tourism Organisations, 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 Plan 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. Over 70 stakeholders were consulted throughout this project, from survey consultation through to one-on-one interviews, forums and workshops.

This Plan does not purport to canvass all possible projects for the regions. Recommendations made were developed through an assessment of projects based on an agreed set of criteria (see Section 2.1).
1.2 Overview of the Townsville North Queensland Region

The Townsville North Queensland region is defined for the purposes of this TOP as comprising the Local Government Areas (LGAs) of:

- Burdekin Shire;
- Charters Towers Regional;
- Hinchinbrook Shire;
- Palm Island Aboriginal Shire; and
- Townsville City.

North Queensland’s Regional Tourism Organisation (RTO) is Townsville Enterprise Limited (TEL), which is also the peak body for economic development in the region.

The Townsville North Queensland region is forecast in 2009 to have a population of 225,582 persons (PIFU, 2008) with 79% of this population residing in Townsville. Townsville is the largest city in tropical Australia, the largest city in Queensland outside of the South East of the State and arguably the largest non-capital regional centre in Australia. The Department of Infrastructure and Planning’s – Planning Information and Forecasting Unit (PIFU, 2008) forecasts population growth in the North Queensland Statistical Division of 46,883 persons from 2009 to 2018, equivalent to an annual growth rate of 2.1% per annum.

Townsville North Queensland is regarded as having a diverse economy with strong contributions from Manufacturing, Mining, Government Administration and Defence, Health and Community Services, Transport and Storage, Construction and Education. Outside of Townsville, Agriculture, particularly sugar and beef are key industries. Accommodation, Cafes and Restaurants, considered a proxy sector for the contribution of tourism to the economy, was 2.2% of the North Queensland economy in 2006-07 compared to 2.9% of the Queensland economy (AECgroup estimates).

There appears a perception in much of Townsville North Queensland that tourism is not a ‘priority’ industry due to its smaller contribution to the region’s economy than many other parts of Queensland. However tourism has performed well in Townsville North Queensland in recent years and the region has strong tourism assets, many of which are underdeveloped and under-utilised. Strong population growth, continued strength in business visitation and the position of Townsville North Queensland between the iconic tourist regions of Mackay-Whitsunday and Tropical North Queensland add to the positive outlook for tourism development.

Through the course of this study it was determined that, with some generalisations, Townsville North Queensland could be broken into precincts for tourism purposes. The Townsville North Queensland region is suggested as comprising of the following tourist precincts:

- Townsville City Heart;
- Suburban Townsville;
- Magnetic Island;
- Townsville Scenic Rim;
- Townsville Northern Beaches;
- Burdekin Beaches and Coastal Fishing Communities
- Southern Wet Tropics Area;
- Hinchinbrook Wet Tropics Agriculture Area and Townships;
- Hinchinbrook Beaches;
- Palm Island Group;
- Burdekin Dry Tropics Irrigation Area and Townships;
- Burdekin River to Cape Cleveland Coastal Wetlands Aggregation;
- Charters Towers Coastal Hinterland;
- Charters Towers Heritage Towns;
- Charters Towers Outback; and
- Great Barrier Reef.

Many of these precincts have minimal existing tourism utilisation. At present, the bulk of tourism activity in Townsville North Queensland is focused on the Townsville City Heart and Magnetic Island. However Townsville Northern Beaches, Southern Wet Tropics, Hinchinbrook Beaches, Palm Island Group, Charters Towers Coastal Hinterland, Charters Towers Heritage Towns and the Great Barrier Reef all have significant current tourism activity.

The precincts are broadly outlined on the following map.
Generalised Tourism Precincts of North Queensland

Source: AECgroup
1.3 Regional Uniqueness

Townsville North Queensland is relatively poorly known as a tourism destination outside of the region. Much of the tourism potential of the region is scarcely recorded and underdeveloped. A little recognised quality of Townsville North Queensland is that it offers a high diversity of environments and potential experiences in the one region.

In terms of natural environments the region boasts tropical islands and the Great Barrier Reef, dry tropical and seasonal wetlands, wet tropics, cool upland rainforests, grazing lands, savannahs and gorges. In terms of the built and cultural environment the region offers the largest city in tropical Australia, small regional towns with rich migrant histories, numerous heritage buildings, agricultural areas, a true remote outback, rich indigenous history and art and some of the most active events and sporting culture in Australia.

The following section categorises Townsville North Queensland by tourism precincts (with broadly shared features). It should be noted that many of these tourism precincts have minimal tourism activity at present.

Townsville City Heart
Townsville is the largest city in tropical Australia. The heart of the city offers dining, shopping, accommodation, gambling, nightlife, a world-class urban beach and waterfront, events and views from Castle Hill in its centre. Attractions in the City Heart include Reef HQ, the Museum of Tropical Queensland and the Townsville Entertainment Centre. The City Heart is considered to have relatively poor connectivity between precincts and Flinders Street is considered by stakeholders to currently be a very poor representation of the region. Works to revitalise the City Heart are underway.

Includes: Castle Hill, The Strand, Breakwater, Townsville CBD.

Suburban Townsville
Little dedicated tourism infrastructure in this precinct, though a number of community assets have tourism values e.g. Riverway, Dairy Farmers Stadium, James Cook University, Shopping Centres, Ross River, Parks and Gardens, Cluden Race Course and the Townsville Showgrounds.

Magnetic Island
Magnetic island is the only residential Island on the Great Barrier Reef, and offers traditional beaches and reefs with laidback accommodation and hospitality. Two-thirds of the Island is National Park with abundant wildlife. Magnetic Island is possibly the best location in the world to see koalas in the wild. The Island has relatively well developed tourism infrastructure with various tours and activities available.

Townsville Scenic Rim
Largely undeveloped and rarely accessed other than by outdoor enthusiasts. Mount Elliot is about 25km from the Townsville CBD and offers peaks to 1,240 metres, waterfalls, swimming holes and dense rainforest. The mountain is poorly accessible apart from at Alligator Creek. Cape Cleveland offers peaks and beaches of quality to compare with Magnetic Island, however is almost exclusively accessed by boat with little infrastructure in the park. Herveys Range has some infrastructure (including a road up the range) however many of its assets are under utilized (e.g. The Pinnacles, Indigenous Art). Bluewater Hills (about 40km from the Townsville CBD) has public access and tracks in the State forest and represents the southern most extremity of the Wet Tropics.

Includes: Bluewater Hills, Herveys Range, The Pinnacles, Mt Elliot, Cape Cleveland.

Townsville Northern Beaches
These beaches are relatively laid back and range from predominately urban (Bushland Beach) to a significant tourism presence, particularly from grey nomads (Balgal Beach). The beaches are popular as fishing bases for local tourists.

Includes: Bushland, Saunders, Toowalla, Toomulla, Balgal Beaches.

Burdekin Beaches and Coastal Fishing Communities
Fishing based holiday villages primarily utilised by North Queenslanders.

Includes: Wujungu, Groper Creek, Alva Beach, Barratta, Cungulla.

Southern Wet Tropics Area
Attractions include Crystal Creek, Paluma, Jourama Falls, Broadwater State Forest and Wallaman Falls (the highest single drop waterfall in Australia). Paluma is the most developed area in terms of tourism facilities and the only area with accommodation. Overall the area is underdeveloped with limited trails and interpretive opportunities.

Includes: Bluewater Hills, Paluma, Hinchinbrook Range, Cardwell Range.

Hinchinbrook Wet Tropics Agriculture Area and Townships
This region consists primarily of lowland cane farms. A number of small heritage towns have a rich Italian, Finnish and Kanaka history. Some developed attractions exist in the area such as the Tyto Wetlands.

Hinchinbrook Beaches
Lucinda is utilized as a gateway to Hinchinbrook Island and also as a popular fishing base for local tourists. Taylors and Forest Beach are primarily utilised by locals.

Includes: Lucinda, Taylors Beach, Forest Beach.

Palm Island Group
World Heritage listed Hinchinbrook Island is internationally regarded. The walking trail around the island would rank as the best long bushwalk in tropical Australia and the boat trail from Lucinda to Mission Beach (either by ocean side or the channel) is also well regarded. The entire Hinchinbrook channel area including the mainland section from the highway to the coast is included in this tourism precinct.

Otherwise the Palm Island group is mostly under-utilised for tourism other than for Orpheus Island. Islands in the Palm Group, including Greater Palm are considered by some to be the most beautiful islands on the Great Barrier Reef.
Tourism Demand
Domestic tourists spent 3.6 million nights in the Northern Visitor Region (NVR – includes NSD plus the former Shire of Cardwell) during 2007/08. This was a slight contraction on the previous year reflecting declines in both interstate and intrastate visitor numbers and their average length of stay.

Domestic Visitor Nights in Northern Visitor Region

Notes: Includes former Cardwell Shire
Source: Tourism Research Australia

Intrastate visitors continue to dominate domestic tourism to the region, comprising 81.5% of domestic visitors in 2007/08. Nearby areas such as Tropical North Queensland and Mackay/Whitsundays are among the key source markets.

The majority of domestic visitors travelled to the region for leisure purposes. Visitors holidaying in the region accounted for 38.3% of domestic visitors in 2007/08. The proportion visiting friends and relatives was relatively high at 33.1%. The majority of the remaining visitors in 2007/08 came to the region for business. Earlier research suggests the proportion of visitor nights spent in the home of a friend or relative is quite high compared to commercial accommodation (AEC Group, 2007).

International visitor nights in the NVR also contracted in 2007/08. This reflects a decline in the average length of stay with visitor numbers actually increasing by 6.2% over the previous year. The United Kingdom (26.0%) and Germany (11.7%) remained the most significant international source markets for the region.

1.4 Tourism Activity in Townsville North Queensland

Indicators of tourism activity in Townsville North Queensland are lower than for the neighbouring Mackay-Whitsundays and Tropical North Queensland regions. In general industries that often provide services to tourists such as Accommodation, Cafes & Restaurants (2.2%) and Retail Trade (5.0%) comprise a lower proportion of the North Queensland’s economic output than the Queensland average (2.9% and 7.4% respectively).
Accommodation

As noted in the Great Tropical Drive survey (AEC Group 2007) a high proportion of visitors to the NVR are self-driving (82.8% of visitors) with a significant number (10.3%) passing through the region on a road tour (AEC Group, 2007). Caravans and motorhomes are the most popular form of accommodation when visiting the region, with 37.8% of respondents nominating this as the form of accommodation to be utilised that night (AEC Group, 2007).

Fixed accommodation in the Northern Tourism Region (NTR) is dominated by motels & guest houses (47.2%) with serviced apartment accommodation under-represented compared to Queensland as a whole.

Accommodation Establishments, June 2008

<table>
<thead>
<tr>
<th>Accommodation type</th>
<th>Northern SD</th>
<th>Queensland</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No.</td>
<td>Share (%)</td>
</tr>
<tr>
<td>Hotels</td>
<td>12</td>
<td>16.7</td>
</tr>
<tr>
<td>Motels and guest houses</td>
<td>34</td>
<td>47.2</td>
</tr>
<tr>
<td>Serviced apartments</td>
<td>6</td>
<td>8.3</td>
</tr>
<tr>
<td>Caravan Parks</td>
<td>20</td>
<td>27.8</td>
</tr>
<tr>
<td>Total</td>
<td>72</td>
<td>100</td>
</tr>
</tbody>
</table>

Notes: Only includes guest nights and takings for hotels, motels & serviced apartments with 15 rooms or more.
Source: Australian Bureau of Statistics (2008c)

For the NTR, the supply of hotel, motel and serviced accommodation has not kept pace with demand over the past ten years. This is evident by an upward trend in the region’s occupancy rate. This is not unique to the region.

Tourism Accommodation Rooms and Occupancy Rate, 1997-2008

Note: Only includes guest nights and takings for hotels, motels & serviced apartments with 15 rooms or more.
Source: Australian Bureau of Statistics (2008c)

Between 2002/03 and 2007/08 the average annual growth in room rates was 9.2% in the NTR, which is a much faster pace than the Queensland average of 6.1%. On average, however, NTR room rates remain below Queensland room rates and the rates are much more seasonal.

Accommodation

Average Room Rates, NTR and Queensland

Average Room Rates, NTR and Queensland

Source: Australian Bureau of Statistics (2008c)

Transport

Although a high portion of visitors drive to the region, aviation still represents an important means of bringing tourists to the region.

Domestic aviation capacity to Townsville has grown strongly over the past ten years and outpaced growth in Australia as whole. However, like the accommodation sector, aviation supply has not kept pace with demand. Passengers have grown at a faster pace than seat capacity resulting in a rise in load factors over the past few years.

Domestic Aircraft and Passenger Movements, 1997/98 to 2007/08

Source: BITRE (2008)

Tourism Outlook

Tourism markets are notoriously volatile and strongly effected by economic conditions, major events and fashions. At the time of writing, the Global Financial Crisis (GFC) has caused dramatic economic declines across the world with major implications for the willingness and ability of people to travel and take holidays. The total impact of the GFC on Townsville North Queensland tourism visitation is yet to be determined. However the GFC does make the already difficult task of future visitation forecasting even more difficult.

Tourism Queensland has developed forecasts for visitor numbers and nights in the Townsville North Queensland region out to 2017, based on its current market share being maintained. These forecasts are inferred from national forecasts of growth in tourism activity. They represent a baseline outcome assuming that current government and industry initiatives continue (i.e. without the TOP) with high-level macroeconomic factors (income growth, exchange rates and so on) providing the basis for growth in tourism activity.
Stakeholders across Townsville North Queensland have expressed a belief that tourism receives relatively minimal attention at the regional and local levels as an economic development priority. The perception is that the relatively strong and stable economy in North Queensland and growth of other industries has minimised a focus on developing the tourism industry. In order to realise the potential of the tourism industry in Townsville North Queensland, it is felt by many that there is a need for a much broader acceptance by the public sector, industry and community of the value that the industry can provide.

According to a survey conducted in 2007 (AEC Group, 2007), 81% of visitors to North Queensland visit Townsville with the next highest location for visitation being Charters Towers (28% of visitors). As the dominant centre in the region, in terms of population, economy and visitation, it is felt by many that there is a need for a much broader acceptance by the public sector, industry and community of the value that the industry can provide.

1.5 The Development and Promotion of the Region

Townsville North Queensland is significantly less recognised nationally and internationally as a tourism destination than Tropical North Queensland and the Whitsundays. The Destination Management Plan for Townsville, North Queensland (Tourism Queensland, 2007) recognises that the region is still in the early stages of establishing its national and international profile as an attractive year-round leisure destination. Whilst building from a lower base, Townsville North Queensland has experienced greater rates of growth in visitation in recent years than the Queensland average. A large proportion of visitors to Townsville North Queensland are repeat visitors (AEC Group, 2007). Visitation is also split relatively evenly between Holiday visitors, Visiting Friends and Relatives (VFR) visitors and Business visitors, a feature that is considered by the region’s tourism industry as helping to minimise volatility in Townsville North Queensland’s tourism industry.

Townsville Enterprise Limited (TEL) is the peak body for the development and promotion of tourism in North Queensland. Each of the local governments also has tourism officers and includes tourism within the scope of their economic development functions.

<table>
<thead>
<tr>
<th>Year</th>
<th>Domestic Visitors (000)</th>
<th>Domestic Visitor nights (000)</th>
<th>Domestic Average stay</th>
<th>International Visitors (000)</th>
<th>International Visitor nights (000)</th>
<th>International Average stay</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007/08</td>
<td>961</td>
<td>3,507</td>
<td>3.6</td>
<td>145</td>
<td>1,276</td>
<td>8.8</td>
</tr>
<tr>
<td>2012</td>
<td>1,078</td>
<td>3,398</td>
<td>3.2</td>
<td>189</td>
<td>1,620</td>
<td>8.6</td>
</tr>
<tr>
<td>2017</td>
<td>1,127</td>
<td>3,468</td>
<td>3.1</td>
<td>243</td>
<td>2,063</td>
<td>8.5</td>
</tr>
<tr>
<td>Annual growth (2007/08 to 2017, %)</td>
<td>1.7</td>
<td>-0.1</td>
<td>n.a.</td>
<td>5.6</td>
<td>5.2</td>
<td>n.a.</td>
</tr>
</tbody>
</table>

Note: Forecast assumes the region’s current market share (June 2008) is maintained.
Source: Unpublished forecasts from Tourism Queensland.
2 Methodology

2.1 Steps taken to compile this TOP

To prepare this TOP the following steps were undertaken:

- Reviewed existing documents with relevance to tourism in Townsville North Queensland;
- Consulted with some 70 stakeholders in the tourism industry and the public sector in the region;
- Conducted an asset review of some 600 identified tourism assets in Townsville North Queensland (whether utilised or not);
- Developed and assessed a list of some 700 potential tourism developments based on the asset review and the results of consultations;
- Conducted workshops and consulted with stakeholders regarding draft potential developments;
- Discussed options and potential developments with the Project Steering Committee for this TOP;

The tourism projects have been assessed against the following criteria:

- Strong level of interest from local stakeholders;
- Infrastructure constraints manageable or resolvable in reasonable time frame;
- Project supports the RTO vision for the region;
- Project will address issues such as lack of attractions or under-utilisation of existing assets;
- Likely net benefits across the social, environmental and/or economic outcomes;
- Number of visits anticipated to be generated, market segments anticipated to be most attracted and anticipated breakdown of visitation between regional and inter-regional visitors;
- Level of visitation anticipated relative to anticipated magnitude of cost;
- State Government agencies not actively opposed;
- No identified ‘Showstoppers’;
- Community sector, private sector and government sector support anticipated without major opposition from any of the sectors anticipated; and
- Seasonality of expected visitation generated, with wet-season (off-season) and year-round visitation deemed superior.

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 Townsville North Queensland as a tourist destination.
3.1 Vision and Strategic Direction

The vision for the region as outlined in the Destination Management Plan for Townsville, North Queensland is:

“Townsville North Queensland will build a sustainable tourism industry through strategic partnerships that focus on marketing to targeted international and domestic customers and the development of suitable tourism infrastructure and product.”

In terms of charting a direction for the next three years (2007–2010), key strategic priorities have been identified through a process of industry feedback and key stakeholder workshops. These priorities are:

- Develop a better understanding of consumer travel dynamics to make sound marketing and development decisions;
- Access additional funding, support and resources for tourism development and marketing;
- Develop distinctive attractions and activities that will enhance appeal, increase visitation, length of stay, and have year-round drawing power to ensure a consistent and stable visitor base;
- Increase awareness of the diversity of experiences and attributes including islands, Great Barrier Reef, outback, heritage and rainforests with a focus on the changing face of the destination;
- Maintain a clearly differentiated and targeted brand strategy for the destination as the platform for international and domestic marketing programs;
- Provide opportunities to increase industry participation in marketing activities that strengthen awareness of the destination among key target markets;
- Strengthen access, infrastructure and interpretation to increase visitation and visitor satisfaction;
- Dispersal of visitors throughout the destination;
- Improve directional and interpretive signage;
- Expand Townsville North Queensland’s ability to host business events and attract signature events to benefit the local economy and increase the destination’s profile;
- Develop quality leisure accommodation and tourism facilities to meet demand;
- Ensure local services meet visitor needs and expectations, e.g. retail, hospitality, tours and transport;
- Develop the range and quality of hospitality and retail services;
- Attract and retain a skilled, experienced workforce;
- Strengthen coordination and cooperation between various government agencies and tourism and hospitality industry operators to work together to grow tourism in the destination; and
- Engender greater community support for tourism development and greater regard for visitor needs.

3.2 Challenges and Opportunities

An analysis of the challenges and opportunities for tourism in the Townsville North Queensland region was a key component of preparing this TOP. This analysis was originally completed for each region within Townsville North Queensland. An overview of the key challenges and opportunities considered is presented below.

The context of these challenges and opportunities is important to their interpretation. The following challenges and opportunities are considered in the context of the growth and performance of the Townsville North Queensland tourism industry. More specifically the growth and performance of the North Queensland tourism industry involves increasing visitor numbers, increasing visitor stay and increasing visitor expenditure.
Challenges

- Environmental constraints on development in some key areas (e.g. GBR, Wet Tropics, National Parks)
- Limited visitor infrastructure and access to National Parks.
- Distance/access to Great Barrier Reef (GBR) and associated islands
- Isolation of many attractions
- Lack of accommodation capacity during peak tourist periods
- Domestic-only flights to airport
- Undeveloped/inappropriate road infrastructure through-out some parts of the region
- Lack of general public acceptance/understanding of the tourism industry
- Tourism not considered an economic priority
- Global Warming / Climate Change
- Extremity of tropical seasons (cyclones and flooding)
- Poor public transport / connectivity in some tourism precincts
- Poor relations with indigenous community in some areas
- Some community resistance to further or large scale tourism development
- Dangerous wildlife (e.g. crocodiles, stingers, sharks, snakes)
- Lack of iconic attraction
- Limited capacity to compete with Cairns and Whitsundays for attention in the market
- Development industry difficulties (Global Financial Crisis, Changes to developer contributions)
- Increased legislative constraints to utilisation and development in high-value tourism areas

Opportunities

- Diverse and large number of natural assets with potential for further development and/or utilisation
- Abundant wildlife in many areas with good opportunity to view (turtles, whales, koalas, bird life, crocodiles, coral)
- Desirable climate for most of the year
- Diverse economy
- Heritage buildings and precincts throughout region
- Strong military history
- Diverse indigenous and other cultures (Italian, Finnish, Kanaka) throughout region
- Recognised world-class diving sites (SS Yongala, GBR)
- Adventure tourism market in the region
- Stable, skilled labour force.
- Opportunities for seasonal workers (often backpackers) in regional areas.
- Large number of community events across the region and a strong sporting culture
- Long coastline with multiple points of interest and access
- Deep water port and cruise ship opportunities
- Townsville is a large, modern city (largest in tropical Australia) with a relaxed lifestyle and culture
- Relatively accessible city with road, rail, sea and air infrastructure
- Considered a relatively safe destination
The following list of 13 catalyst projects has 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 in the following pages and their regional dispersal is depicted on the map on page 14. 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 realising the full tourism potential of the region.

These catalyst projects, along with the following list of Infrastructure Challenges (Section 4.3) and Precinct Tourism and Support Infrastructure Projects (Section 4.4), provides a strong basis for guiding the ongoing development of an exciting and sustainable tourism industry in Townsville North Queensland over the next 10 years.

4.1 The Catalyst Projects

As a result of research and consultations 13 catalyst projects are recommended for the region:

- Greater Townsville CBD Tourism Precinct;
- Townsville Cruise and Military Ship Terminal;
- Townsville Business Events Centre;
- Townsville Artificial Reef;
- Magnetic Island as a Sustainable Destination;
- White Mountains National Park Wilderness Camping and Walking;
- Palm Island Adventure Trek;
- Wallaman Falls EcoResort;
- Off-road Adventure Park;
- Tourist Parks Cluster;
- Coast and Islands Boating Trail;
- Indigenous Rock Art and Relics Trail; and
- Cromarty Wetlands / North Queensland Wetlands Network.

These projects are discussed below.
Indicative Locations for the Suggested Catalyst Projects

1. Greater Townsville CBD Tourism Precinct
2. Townsville Cruise and Military Ship Terminal
3. Townsville Business Events Centre
4. Townsville Artificial Reef
5. Magnetic Island as a Sustainable Destination
6. White Mountains National Park Wilderness Camping and Walking
7. Palm Island Adventure Trek
8. Wallaman Falls EcoResort
9. Off-road Adventure Park
10. Tourist Parks Cluster
11. Coast and Islands Boating Trail
12. Indigenous Rock Art and Relics Trail
13. Cromarty Wetlands / North Queensland Wetlands Network

Source: AECgroup
4.2 Overview of Catalyst Projects

4.2.1 Greater Townsville CBD Tourism Precinct

The Townsville CBD is the primary tourist hub, with market research estimating over 80% of visitors to Townsville North Queensland visit the city at some point. The CBD area has a number of popular tourism precincts and attractions however the greater CBD (broadly defined as including Castle Hill, the Strand, the CBD and the Breakwater Precinct) is relatively disjointed. The area lacks a natural progression for pedestrians and there are many features throughout the area that could be further developed for tourist and resident uses alike.

Of particular note, it is widely considered that the existing CBD, particularly Flinders Street, is rundown and presents a very poor image to visitors. This project would involve recognising the broader CBD as a tourism precinct and planning for a number of measures to improve the assets and connectivity of the area. Many of the Townsville CBD developments that will benefit tourists will also benefit the local community through improving the lifestyle usability of the CBD.

Townsville City
4.2.2 Townsville Cruise and Military Ship Terminal

Townsville is currently visited by a growing number of cruise and military ships. Currently the ships either disembark at the commercial port or have passengers ferried to shore by local boats (e.g. Sunferries). The passengers from these ships can bring significant short-term spending to the region however these opportunities are not maximised due to the logistics of bringing the passengers to shore, and then to the CBD and other tourism areas.

A dedicated cruise and military ship terminal is required in Townsville for the region to maximise its opportunities with this growing market and to help build a network of infrastructure in Queensland to attract more cruises. It may also potentially serve as a base for expedition-cruise ships developing routes along the North Queensland Coast. The terminal needs to have excellent links to the broader Townsville CBD, to encourage visitors to explore the city and learn more about the region’s potential.

Cruise Ship in Cairns

Volendam Berthed at Trinity Wharf, Cairns
4.2.3 Townsville Business Events Centre

Townsville currently has an Entertainment and Convention Centre on the Breakwater Peninsula. This venue is designed primarily for sporting events and is considered a relatively poor compromise for conventions. Townsville is the largest city in tropical Australia and a significant existing business event destination. A purpose built business events centre in the Townsville CBD area or major renovation of the existing entertainment centre would be an important development to support the continued growth of the business visitor market in the region.

A Business Events Centre

Convention Centre Cairns
4.2.4 Townsville Artificial Reef

Townsville is very well known for the Great Barrier Reef through Reef HQ and one of the world’s largest clusters of marine biologists with institutions such as AIMS, GBRMPA and JCU. However, high quality reefs are difficult to access from Townsville. The outer reef is much further from Townsville than Cairns and can only be accessed through exposed waters. The distance involved and cancellations due to regular rough weather makes commercial reef cruises from Townsville commercially difficult.

An artificial reef close to Townsville would be less subject to rough weather and faster to access than the existing reef. It would ideally serve as an intermediate product for tourists between Reef HQ and renowned sites such as the S. S. Yongala wreck and outer reef. Such a development could be based on specially engineered concrete structures such as utilised in Florida and Israel (rather than sunken ships etc) and ideally provide both snorkelling and diving opportunities. The design, installation and monitoring of the reef may also provide research opportunities for JCU, GBRMPA and AIMS.

Great Barrier Reef

Source: Yongala Dive
4.2.5 Magnetic Island as a Sustainable Destination

Magnetic Island is one of the major tourism assets in Townsville North Queensland being popular with locals and international visitors alike. The island is a rare example of an island on the Great Barrier Reef housing a permanent resident population.

Magnetic Island is already a dedicated solar suburb of Townsville’s Solar City project and much of the Magnetic Island community is interested in issues of ecological sensitivity and sustainability. The current sustainability measures on the island are largely hidden from tourists. This project would involve a range of initiatives to further develop Magnetic Island as a benchmark sustainable community and tourist destination. Magnetic Island offers a unique opportunity to showcase the application of a wide range of sustainable initiatives and technologies in a real community. The island could act as a microcosm for the application of green technologies, aiming to set the standard for initiatives such as Green Globe Communities.

Great places to live are also great places to visit. Companies and governments wishing to promote sustainable technologies should find little difficulty in convincing their clients to visit Magnetic Island and see how their solutions are sustaining a community.

Magnetic Island
4.2.6 White Mountains National Park Wilderness Camping and Walking

White Mountains National Park is a 108,000ha remote and relatively undeveloped National Park west of Charters Towers, consisting of a sandstone plateau intersected with deep, steep-sided gorges. A small section of the park is accessible from the Flinders Highway however the more spectacular areas are to the north of the highway and currently inaccessible to the public.

The three main features of White Mountains are: numerous deep, cool gorges; abundant and unique indigenous rock art; and highly diverse flora on the plateaus resulting in a rich and colourful winter/spring wildflower display. The first two features are superficially similar to Carnarvon Gorge whilst the wildflower display is unique in Townsville North Queensland.

The project would involve developing an access road, day-use and camping areas and walking trails into the northern section of White Mountains National Park. Whilst the location is remote attractions with similar features have been very successful in other remote areas (e.g. Carnarvon Gorge, Bungle Bungles).

Source: Image courtesy of Charters Towers Regional Council
4.2.7 Palm Island Adventure and Camping Trek

Hinchinbrook Island’s Thorsborne Trail is world renowned and attracts demand in excess of the trail’s limit on visitation numbers. Greater Palm Island is located approximately 35km to the south east of Hinchinbrook Island and offers similar world class natural features to Hinchinbrook Island. Palm Island also offers Indigenous culture and infrastructure not available on Hinchinbrook Island.

This project would involve developing an iconic walking trail along the coast of Palm Island of similar length to the Thorsborne Trail on Hinchinbrook Island. It is estimated that the track would take several days to walk and would include a number of camping areas or camping huts. There would also likely be developed a number of short walks from the main track to features such as waterfalls, mountains, swimming holes and lookouts. The track would be promoted as a complement to the Thorsborne Trail and aim to meet some of the existing excess demand for walking on that trail as well as forming a basis for developing other associated tourism on Palm Island. This project may also need to include the investigation of alternative accommodation options on the island particularly at the start and/or the end of the walking trail.

Walking in Townsville North Queensland
4.2.8 Wallaman Falls EcoResort

Wallaman Falls is the highest single drop waterfall in Australia. The area has a number of existing walking trails including the start of the Great Tropical Walk. A range of Wet Tropics flora and fauna, including cassowaries, are regularly viewed in the region. As the falls are located at altitude, the area is significantly cooler than the surrounding lowlands and makes a welcome respite in the summer.

An eco-resort development at Wallaman Falls would enable tourists to stay at Wallaman Falls and also potentially include a café to provide day-trippers with the option of purchasing a meal and drink at the falls. It is proposed that the eco-resort would be located close to the actual Wallaman Falls, however not on National Park land.

Wallaman Falls
4.2.9 Off-road Adventure Park

There is a lack of designated locations in Townsville North Queensland for trail bike and off-road vehicle enthusiasts to recreate. Anecdotal evidence indicates that there is significant interest in such activities from locals and visitors from surrounding regions and potential for tourists passing through the region (either in their own off-road vehicles or in terms of hiring a vehicle for an adventure day). Whilst off-road motor sports are envisioned as the key feature of this development, a range of other adventure activities may also be incorporated. Mountain biking, skirmish, abseiling and rock-climbing are amongst a range of activities that could be incorporated on a suitable site.

An Off-road Adventure Park could be established on a large private land holding with suitable terrain in Townsville North Queensland. Typically such a development would include accommodation (huts, caravan/motor home and camping), pro shop, dinning / basic supplies shop and a variety of off-road trails, and adventure areas.

Off-road Adventure
4.2.10 Tourist Parks Cluster

Throughout Queensland a large number of caravan parks sites have been lost to alternative, often more valuable development uses. The recent rise in the appeal of, and demand for, tourist parks within Australia which offer visitors a more ‘up-market’ caravan park experience with high quality camping, cabin and recreational facilities, presents new opportunities for the caravan/tourist park market in North Queensland. Under ‘business as usual’ scenarios, Townsville North Queensland is forecast to require an additional 1,500 caravan park sites over the next 10 years. However, with the potential of the ‘tourist park’ trend or greater than ‘business as usual’ visitor growth there is scope for growth in demand to be even greater than projected.

A Townsville North Queensland Tourist Parks Development Plan would prepare a more detailed forecast of the need for additional sites across North Queensland and develop a whole of region plan for prioritising and developing sites to meet demand. Areas with special features of value to tourist parks, such as beaches, fishing communities, national parks and lakes would be assessed in the plan and with appropriate development outlined. Tourist parks are often one of the best developments to open up new tourism areas, as they required less infrastructure than other forms of accommodation. Mechanisms for updating the plan to meet updated demand needs would also be required.

Tourist Park

Tourist Park, Mission Beach
4.2.11 Coast and Islands Boating Trail

The coastline of North Queensland has a number of interesting capes, beaches and islands, however the majority are poorly utilised by tourists. In the USA, a number of boat or water trails have been established, which are point-to-point routes similar in concept to multi-day hiking trails. The trails are considered successful and many have been established in recent years.

Townsville North Queensland has the natural assets and climate to establish such a trail. The project would involve identifying and establishing accommodation and camping points along the coast with mooring facilities that are linked by trail maps with activity options (fishing, snorkelling etc) highlighted. The Boating Trail would ideally be designed to be utilised by a variety of craft from kayaks and canoes, to sail and motorboats. Additional opportunities based on the boating trail would include guided tours, boat hire and micro-cruises.

Boating in Townsville North Queensland

Orpheus Island
4.2.12 Indigenous Rock Art and Relics Trail

Indigenous tourism is currently under-utilised in Townsville North Queensland despite some notable initiatives such as the Dreamtime Tracks marketing initiative. International tourists in particular are keen to explore Indigenous culture however there is significant domestic market potential as well.

Townsville North Queensland is home to a wealth of Indigenous culture features, including many rock paintings and carvings, which are often proximate to roads and other access points but otherwise hidden. The project would include creating access to a number of Indigenous cultural attractions across the region as a linked trail. Sites would have varying levels of access from public (with parking, interpretive signage and basic facilities) to guided access only. A written guide to Indigenous attractions in the region would be produced with suggested routes, directions, maps and information about each of the identified sites and available guides/tours for restricted sites.

Indigenous Rock Art Near Charters Towers

Source: Image courtesy of Charters Towers Regional Council
4.2.13 Cromarty Wetlands / North Queensland Wetlands Network

Townsville North Queensland has a large number and diversity of wetlands with abundant wildlife and interesting flora. Market research has indicated a high level of interest in visiting the region’s wetlands and the Tyto Wetland Centre near Ingham has been considered successful. Some of the regions wetlands, such as Cromarty in the Burdekin are considered by some to better well known Australian wetlands such as Kakadu for scenery and wildlife.

A network of wetlands interpretive facilities would involve developing access points, parking, boardwalks and interpretive signage at a number of wetlands. Information on the other wetland attractions in the region would also be provided with descriptions of the individual character and features of each.

Cromarty Wetlands
4.3 Infrastructure Challenges

4.3.1 Upgrade of the Bruce Highway

Many areas of the Bruce highway in Townsville North Queensland are degraded or have suffered from a lack of upgrades in recent years. Some areas are subject to flooding, which can completely block access to regions during the wet season. Many tourism operators report that tourists are deterred by the possibility of being cut-off by floodwaters and are subsequently hesitant to visit North Queensland in the wet season. A lack of passing lanes also results in the highway easily being ‘choked’ by caravans and motor homes during the peak season.

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<tr>
<th>Project Opportunities</th>
<th>Key Considerations and Issues</th>
<th>Conclusion</th>
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<tbody>
<tr>
<td>• Less flooding of the Bruce Highway may improve wet season tourism in the region</td>
<td>• Upgrading the Bruce Highway is an ongoing issue</td>
<td>• Lobbying for further upgrades of the Bruce Highway needs to be an ongoing objective</td>
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<td>• Improved road surfaces will improve the enjoyment of travelling on the highway</td>
<td>• The Bruce Highway is a federally funded road</td>
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<td>• More passing lanes and two-lane sections will improve traffic flow and reduce disruption from slow vehicles</td>
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4.3.2 All-Weather Roads to Tourism Destinations

The majority of tourists visiting Townsville North Queensland are self-driving. A number of the important tourist attractions have relatively poor road access that constrains access from hire cars, caravans, motor homes and in some cases most conventional vehicles. This project involves a progressive program of upgrading roads to areas of tourism importance or potential.

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<tr>
<td>• Sealing of roads to tourism destinations will enable access for hire cars and caravans</td>
<td>• Sealing of large stretches of road is expensive and will need to be conducted progressively</td>
<td>• Sealing of roads to tourism attractions will need to be considered on a case-by-case basis where significant benefits are likely</td>
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<td>• Sealing of roads to little visited attractions may be hard to justify, even where significant potential to grow visitation to the attraction exists</td>
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4.3.3 Upgrading of the Gregory Development Road North of Charters Towers to Two Lanes of Bitumen

The Gregory Development Road runs north and south of Charters Towers, connecting the city to Greenvale and Clermont. The route is heavily trafficked by trucks carrying cattle and mining goods and increasingly popular with tourists, particularly those with caravans and motor homes. The road is narrow and dangerous in parts, particularly when road trains are encountered, which dissuades many self-driving tourists to travel the inland route through Townsville North Queensland.

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<tr>
<td>• A safer Gregory Development Road would increase the attractiveness of the route to self-drive tourists – particularly ‘Grey Nomads’</td>
<td>• The level of future mining traffic on the Gregory Development Road will strongly impact whether it is seen as a good candidate for significant upgrade</td>
<td>• Upgrading of the Gregory Development Road would bring benefits to regional tourism, however seems likely to be justifying on its value to industry and freight movements</td>
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<td>• A better quality Gregory Development Road also has the potential to share some of the freight task of the Bruce Highway, reduced heavy traffic on the coastal route</td>
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4.3.4 Upgrade of the Ferry Terminal at Palm Island

Palm Island is considered as one of the most attractive islands on the Queensland coast and has an indigenous culture that is of potential interest to tourists. There is also interest from the Palm Island community in developing tourism. At present, ferry access to the island is poor with boats only able to dock at certain tides and poor quality disembarking facilities. This project would involve developing ferry access at Palm Island that was accessible at any time and would have appropriate disembarking facilities for a range of visitors.

This development is an enabling initial step in developing the tourism potential of the island. It would also have significant benefits for the local community, enabling ferry transport to Townsville to be a more viable option for residents and commuters.

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<tr>
<td>An improved ferry terminal will enable ferries to carry tourists to Palm Island for events or general tourism</td>
<td>The ferry access is currently being dredged to improve ferry access during low tides</td>
<td>Ferry access to Palm Island that enables safe and relatively comfortable disembarking is important to providing Palm Island with the opportunity to develop its tourism industry</td>
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4.3.5 Master Plan for Intermodal Public Transport Connectivity in Townsville

There is currently a lack of cohesion between public transport modes in Townsville. Links between inter-city buses, intra-city buses, the airport, rail and ferries are not considered easy to navigate by stakeholders. Possible improvements could involve a more centralised transit centre and transit hubs. Further efforts are required to incorporate the ferry terminal and airport to improve the transport usability for tourists.

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<tr>
<td>Better connected public transport would make the city more attractive to visitors typically lacking their own transport, such as backpackers and business tourists</td>
<td>Public transport is generally heavily subsidised. The additional operating costs of any plans to improve connectivity will be a key consideration</td>
<td>Improved public transport connectivity in Townsville should be pursued with relevance to both residents and tourists</td>
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</tbody>
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4.3.6 Boat Launching and Mooring Infrastructure Review

Boating is popular in Townsville North Queensland with locals and visitors. Boating has grown strongly in popularity in Townsville North Queensland in recent years with the result that boating infrastructure is under strong pressure. Access to, and the quality and number of, current boat ramps in the region poses a restriction on this activity. There is also a lack of places for boats to moor in popular areas and pontoons and jetties for smaller craft are limited. Boats relying on anchoring are more likely to cause damage to the environment. Both the creation of new boat ramps and the upgrading of existing should be considered. Access to and parking at launching points in the region also needs to be reviewed.

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<tr>
<td>Townsville North Queensland waters are well suited to boating</td>
<td>Developments in the marine area require approvals from the EPA and GBRMPA</td>
<td>Boating infrastructure development is currently required for local residents needs however should also consider the benefits for tourism</td>
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## 4.4 Precinct Tourism and Support Infrastructure

### Anywhere in North Queensland

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<tr>
<th>Project</th>
<th>Description</th>
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</table>
| Major Solar Power Plant     | There is a rapidly growing recognition of the challenges posed by climate change and the need for alternative energy at the public and political level around the world. Townsville North Queensland receives very high levels of solar radiation and is well suited to generating solar/photovoltaic power. Townsville is already designated as a Solar City however has very little to show visitors to back up this status. From a tourism perspective a major solar power plant would have value as an attraction in itself as well as lending the entire region an enhanced profile as a more sustainable destination. | • The location of a solar power plant is important with the ideal site for efficiency not necessarily aligning with an ideal site for tourism  
• This project has a relatively short time frame for success (5 years?) as first mover status is required for the solar plant to be of novelty to tourists  
• A major solar power plant in the region will also help to boost the overall environmental credentials of Townsville North Queensland |

### Across Townsville North Queensland

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| Plan for Accommodation Utilisation of Heritage Buildings | A number of heritage buildings across Townsville North Queensland’s towns and city would make unique accommodation venues. Assistance in overcoming heritage restrictions in developing these assets is required. | • The plan would need to focus on strategies to reduce the barriers to private industry utilising heritage buildings  
• Revitalisation of heritage buildings is often very expensive and complicated. Any measures that can make the task easier and/or cheaper will be positive for utilisation |
| Tourism Directional Road Signage             | Stakeholders report that many visitors find it difficult to travel through Townsville North Queensland due to limited road signage directing travellers to popular tourist areas. Surveys have also found issues with road signage. A tourism signage strategy would help direct self-drive visitors from the Bruce Highway to significant tourism infrastructure, ideally utilising a specific form of signage to differentiate destinations of tourism value. | • Directional road signage is relatively inexpensive to install and maintain  
• Road safety concerns with unnecessary signage are valid however should be able to be addressed as they have in many other areas  
• A road signage strategy should be reviewed regularly and updates made if possible |
| Caravan and Motorhome Comfort Stop Network   | Caravan and Motorhome users are a major group of visitors to Townsville North Queensland. This project would involve the development of a number of short-term comfort stops across Townsville North Queensland to improve the accessibility of the region to this user group. The operating parameters of comfort stops should be developed in consultation with local tourist park operators. | • A caravan and motorhome comfort stop network should not be a substitute for commercial tourist parks  
• A plan needs to consider the availability of resources to maintain and regulate visits to the comfort stop network  
• The network should aim to take caravans and motorhomes off the standard routes and into new and underutilised tourism areas |
| Farm and Home stay Network Centre           | There are few farm and home stays presently in Townsville North Queensland. This project would involve establishing a centre to assist those considering such developments to work through local laws, regulations and renovations required to become operational. It may also provide operating support. | • Most of the anticipated expenditure is related to operating expenses  
• May work most efficiently as an additional sector within TEL |
### Across Townsville North Queensland

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<tr>
<td>Land-based Fishing Access Network</td>
<td>Fishing is a popular activity in Townsville North Queensland for locals and visitors alike. This project would involve developing a network of infrastructure such as jetties, pontoons and waterfront areas where visitors could fish without the need for a boat.</td>
<td>• This project could be conducted for minimal cost by reducing the scope to providing a guide to the region’s land-based fishing network (similar to the fishing maps for boat-based fishing published by the Townsville Bulletin)</td>
</tr>
<tr>
<td>Temporary Accommodation Strategy and Infrastructure</td>
<td>There are a number of events across Townsville North Queensland throughout the year that overwhelms local accommodation capacity. Permanent accommodation is only viable when built to meet average demand as opposed to peak demand. Some private companies (e.g. Tent City Hire) in other parts of Australia provide temporary accommodation solutions for such events. This project would involve developing a reserve of temporary accommodation infrastructure in Townsville North Queensland, possibly public owned (e.g. by a consortium of local governments), to be utilised across Townsville North Queensland during peak events. A strategy that schedules the accommodation infrastructure across the year and identifies sites for its deployment would also be required. The infrastructure may also serve as contingency temporary accommodation for the region in the case of a major cyclone.</td>
<td>• There may be scope to extend the coverage of this strategy (e.g. include the Tropical North Queensland and/or Whitsundays) to improve the viability&lt;br&gt;• An detailed investigation of this project should examine all possible alternative uses of the infrastructure throughout the year (e.g. Temporary workers quarters)</td>
</tr>
<tr>
<td>Wild Crocodile Viewing Point Network</td>
<td>Crocodiles are part of the mythology of northern Australia and viewing them is a strong drawcard for tourists at attractions such as Billabong Sanctuary. Tourists are also interested in seeing crocodiles in the wild and there are a number of areas in Townsville North Queensland, particularly in the Burdekin and Hinchinbrook, where this is possible. This project would involve establishing a number of dedicated viewing points where tourists can visit to potentially see crocodiles in the wild. This would be similar in practice to a number of platypus viewing sites across Australia.</td>
<td>• Wild crocodile viewing points should be selected carefully to not conflict with other uses&lt;br&gt;• At the simplest this project may involve a guide to locations for the chance to view a crocodile in the wild – at the most elaborate viewing platforms and interpretive facilities could be provided</td>
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### Townsville City Heart

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<tr>
<td>Revitalisation of the Reef HQ, Cultural Centre and Museum of Tropical Queensland Precinct</td>
<td>Reef HQ, the Cultural Centre, and the Museum of Tropical Queensland form a strong base for tourism within the limits of Townsville’s CBD. Conveniently located within the same building, the three attractions should serve as a central precinct for regional tourist interpretation in Townsville. However the place lacks a sense of unity and is not a particularly vibrant place for tourists to visit. A significant revitalisation of the area would help the precinct to achieve its potential as a tourist asset.</td>
<td>• There is potential to develop a Visitor Information Centre in the precinct as part of a redevelopment</td>
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<tr>
<td>Department Store or High-end Fashion Retail Development</td>
<td>Despite being the largest city in tropical Australia, Townsville currently lacks a high-end department store or fashion retail development (such as Myer, David Jones or equivalent cluster). Establishing a high-end fashion development in Townsville would help reduce leakage of tourism dollars from Townsville, bring additional regional tourists to the region and help retain more expenditure from existing tourists.</td>
<td>• The proposed Flinders Plaza development would meet the aims of this project</td>
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<td>Project</td>
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<tr>
<td><strong>Consolidated Ferry Terminal and Public Transport Interchange</strong></td>
<td>There are currently two ferry terminals in Townsville: for the passenger and car ferries. These terminals are on opposite sides of Ross Creek and not easily travelled between due to a lack of bridges on the lower Ross Creek. This project would involve consolidating the two ferry services to Magnetic Island at the one terminal. This would also simplify public transport linkages.</td>
<td>• Project has been mooted by the Port of Townsville Limited for some time</td>
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<tr>
<td><strong>Flinders Street East Waterfront Precinct</strong></td>
<td>Flinders Street East is currently the nightlife precinct for Townsville with numerous nightclubs, pubs and restaurants. A current car parking area along Ross Creek is out of character with the inner-city area and under-utilised. Plans have been raised to develop this into a mix of commercial, residential and waterfront dining and entertainment with a pedestrian bridge connecting to Palmer Street. Such a development would add considerably progress the Palmer Street / Flinders Street East area as an inner-city entertainment precinct.</td>
<td>• Plans have been previously submitted by Mirvac to fulfil this concept. At time of writing a public statement indicated that Mirvac intends to proceed with the project however is reviewing the plans. Townsville City Council should consider the potential value of the development to add to the inner city tourism infrastructure in assessing the development application.</td>
</tr>
<tr>
<td><strong>Major Visitor Information and Interpretive Centre for North Queensland</strong></td>
<td>Townsville currently lacks a modern, dedicated tourist information and interpretive centre, with the existing visitor information centre being small and outdated. A quality visitor information centre in Townsville is important to tourism in all of North Queensland with around 80% of the region’s tourists passing through the region. A high quality visitor information and interpretive centre would provide visitors with a better understanding of the region’s potential and link into the regional areas.</td>
<td>• A new Visitor Information Centre has been proposed for the Flinders Street redevelopment by Townsville City Council. There are also alternative locations for such a development such as at the ReefHQ / Museum of Tropical Queensland / Cultural Centre precinct.</td>
</tr>
<tr>
<td><strong>Museum of Tropical Queensland New Attractions with Increased Linking to North Queensland Tourism Experiences</strong></td>
<td>The Museum of Tropical Queensland is a popular attraction for many tourists visiting the area. The museum is sleek and modern, and has a number of impressive facilities. The museum has the potential to grow in its provision of attractions as entrée’s to interesting activities and attractions for tourists in Townsville North Queensland.</td>
<td>• The Museum of Tropical Queensland’s proposed ‘Bug Safari’ project has the potential to be a major drawcard for visitors from surrounding regions (eg. Educational tourism) as well as help serve as an entrée to the regions.</td>
</tr>
</tbody>
</table>

### Suburban Townsville

<table>
<thead>
<tr>
<th>Project</th>
<th>Description</th>
<th>Comments and Conclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hospital/JCU Accommodation Precinct</strong></td>
<td>The Townsville General Hospital and James Cook University attract a large number of visitors to the region and create demand for short and medium term accommodation. The construction of an accommodation precinct would allow visitors and users of the facilities to stay within proximity of the facilities. An accommodation precinct may be able to be incorporated into the proposed ‘Discovery Rise’ development at JCU.</td>
<td>• Previous Thuringowa City Council had plans to develop Thuringowa Central for a range of ‘town centre’ uses including accommodation</td>
</tr>
<tr>
<td><strong>Riverway / Thuringowa Central Accommodation Precinct</strong></td>
<td>The development of the Riverway complex has been popular amongst locals and tourists. Thuringowa Central is also home to Diary Farmers stadium and will soon be on the main highway passing through the region. Currently there is a limited amount of accommodation available in this area.</td>
<td>• Previous Thuringowa City Council had plans to develop Thuringowa Central for a range of ‘town centre’ uses including accommodation</td>
</tr>
</tbody>
</table>
### Suburban Townsville

<table>
<thead>
<tr>
<th>Project</th>
<th>Description</th>
<th>Comments and Conclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tourism Directional Signage Strategy for the Townsville Ring Road</strong></td>
<td>The new Townsville Ring Road will change the way that tourists move through the region. The highway will mean that vehicles pass through the region at higher speeds. The addition of clear and concise signage displaying the tourism precincts at turnoffs (e.g., Charters Towers, The CBD/Strand/ Magnetic Island, Riverway/Dairy Farmers Stadium) would help capture the important drive-through tourist market.</td>
<td>• Project needs to be implemented ASAP and regularly reviewed</td>
</tr>
</tbody>
</table>

### Magnetic Island

<table>
<thead>
<tr>
<th>Project</th>
<th>Description</th>
<th>Comments and Conclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Camping Ground Development</strong></td>
<td>Magnetic Island is a key tourist destination in Townsville North Queensland. At present there is very limited camping available on the island. This development would create a significant camping facility on the island that would be utilised by general tourists as well as peak loads such as schoolies week.</td>
<td>• The location of a camping ground would ideally be proximate to shops and facilities but buffered from existing residences • The responsibility for the operation and maintenance of the camping ground may have potential to be privatised</td>
</tr>
<tr>
<td><strong>Horseshoe Bay Jetty or Pontoon</strong></td>
<td>Horseshoe Bay is currently the most popular bay on Magnetic Island for water-based activities. A jetty or pontoon in the bay would allow for better utilisation of the bay for water sports, providing improved boat mooring and launching and serving as a launching point for water based tours.</td>
<td>• A pontoon is likely to be a simpler and less-expensive option</td>
</tr>
<tr>
<td><strong>Nelly Bay Terminal Iconic Characterisation</strong></td>
<td>Magnetic Island is known as an individual and slightly eccentric destination compared to other islands on the Queensland coast that are considered to have a blander, more commercial character. The new Nelly Bay ferry terminal, opened in 2004, is an excellent and well-utilised facility however lacks the character that Magnetic Island is known for. This project would involve superficial works to bring some of the local character of Magnetic Island to the ferry terminal.</td>
<td>• This project will require significant community consultation to arrive at a vision for the iconic characterisation • Provided a theme is agreed the project could be undertaken relatively quickly with relatively limited funds</td>
</tr>
<tr>
<td><strong>Nelly Bay to Arcadia Walkway</strong></td>
<td>Nelly Bay to Arcadia Bay is a popular route for pedestrians however is currently dangerous due to a steep winding road, narrow road shoulders and blind corners. This walkway would provide a dedicated pedestrian route between the two bays offering new iconic views from a suspended walkway.</td>
<td>• Project is currently being considered by Townsville City Council</td>
</tr>
<tr>
<td><strong>Snorkelling Trail</strong></td>
<td>Magnetic Island has a number of excellent snorkelling areas. This project would involve formalising a snorkelling trail with a series of plinths on the seafloor mounted with interpretive signs related to reef features.</td>
<td>• The advice of local marine biologists should be sought in the location and features for a snorkelling trail</td>
</tr>
</tbody>
</table>
### Townsville Scenic Rim

<table>
<thead>
<tr>
<th>Project</th>
<th>Description</th>
<th>Comments and Conclusion</th>
</tr>
</thead>
</table>
| **Townsville National Parks Enhanced Day Use Areas**                    | **(Bluewater Hills, Mt Elliot, Townsville Scenic Rim National Park)**                                                                                                                                                                                                 | • Anticipated to primarily appeal to inter-regional visitors  
• Promotion of the day use areas to the local region would be important to develop utilisation  
• There is potential to develop a range of nature-based activities (bushwalking, mountain biking, rockclimbing) from the various day-use areas                                                                                                                                                                                                                                                                                                                     |
| **Cape Cleveland Tourist and Boating Village Development**              | Cape Cleveland is a prominent headland to the south of Townsville about 22km by water from the CBD. The tip of the cape has excellent beaches and an exposed headland with a lighthouse and former quarters offering panoramic, almost 360 degree, views of the Burdekin, Magnetic Island and Townsville. The area is only accessible by boat. This project would involve developing the area further as a boating village with further mooring areas, potentially a jetty, day use areas and trails along the Cape. This could become a day-trip area from Townsville and Magnetic Island and an important stop on a regional boating trail. | • A tourist and boating village could become part of a North Queensland boating trail                                                                                                                                                                                                                                                                                                                                                                                                                   |

### Southern Wet Tropics Area

<table>
<thead>
<tr>
<th>Project</th>
<th>Description</th>
<th>Comments and Conclusion</th>
</tr>
</thead>
</table>
| **Cardwell Range Lookout Hiking Trail**                                | Currently an informal lookout exists with views across the Hinchinbrook Passage and Island on the Bruce Highway at the Cardwell Range that is popular with tourists. This highway section is due to be upgraded by the Department of Main Roads with plans to formalise this lookout areas with turnout areas and parking. There is opportunity to develop short walking trails from this point for tourists to access better views from higher on the range. | • Safety with any potential crossing of the highway by pedestrians needs to be considered  
• The trail should be developed to lead higher to a superior view point to that available on the road                                                                                                                                                                                                                                                                                                                                 |
| **Expansion of the Walking Trails Network at Paluma**                   | Paluma is well recognised for its wet tropics rainforest. It is considered that the current offering of walks at Paluma is limited and fails to showcase the true value of the location. Expanding the walking trails and facilities in Paluma would improve the destinations tourism value, particularly as a repeat destination. | • Planning for this project needs to consider the maintenance requirements following the development of the trails  
• There are a large number of former / closed trails around Paluma that could be re-opened for use with appropriate maintenance expenditure  
• Local bushwalking clubs should be consulted as the most appealing routes to develop                                                                                                                                                                                                                                                                                                                                                             |
| **McClellands Lookout (Paluma) Viewing Deck**                          | Paluma is an area of high tourist potential. The region is home to a number of natural assets, including substantial areas of rainforest. McClellands lookout is the iconic ‘first stop’ when visiting Paluma, however the viewing area is becoming overgrown. Constructing a viewing deck would enhance the area providing a more iconic view across the region. Further improvements could be made to existing amenities at the lookout. | • Relatively simple project                                                                                                                                                                                                                                                                                                                                                                                                                          |
### Hinchinbrook Beaches

<table>
<thead>
<tr>
<th>Project</th>
<th>Description</th>
<th>Comments and Conclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dungeness Boat Ramp Launching Pontoon</td>
<td>Lucinda is the gateway to Hinchinbrook Island and the Hinchinbrook Channel. Boating in the region is extremely popular with tourists and locals alike. An improved boat ramp with pontoon would make launching boats at Lucinda simpler and safer, allowing more people to utilise the region.</td>
<td>• A similar concept has been applied successfully at Mission Beach</td>
</tr>
</tbody>
</table>

### Palm Island Group

<table>
<thead>
<tr>
<th>Project</th>
<th>Description</th>
<th>Comments and Conclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pilot-Commercial and Accommodation Tourism Project</td>
<td>The Palm Island Group consists of a cluster of 12 or so tropical islands including Greater Palm Island (home of a large Indigenous community) and Orpheus Island (an exclusive island resort). The group has a wealth of attractive features for tourism, including picturesque islands and beaches, abundant reefs, fishing, sheltered boating waters and indigenous history and culture. This project involves developing a pilot-commercial/ accommodation tourism venture in the Palm Islands, which involves the local Indigenous community. An existing example of a potential development is the Munupi Wilderness Lodge on Melville Island (Northern Territory), which offers guided fishing utilising local Indigenous knowledge.</td>
<td>• A pilot-commercial accommodation project on Palm Island should be able to achieve an initial patronage from the business visitor market • Accommodation on the island would work in synergy with the development of the walking trail</td>
</tr>
<tr>
<td>Hinchinbrook Island Review of Tourism Use and Management Needs</td>
<td>Hinchinbrook Island’s Thorsborne Trail is perhaps the most internationally recognised and world class long range walking &amp; camping opportunity in Queensland. This project would involve a review of the tourism potential of the long range walking &amp; associated camping opportunities on Hinchinbrook Island so as to provide a world class sustainable wilderness tourism experience.</td>
<td>• The review should consider the full balance of economic, social, environmental and financial costs and benefits of potential changes to the existing tourism use of Hinchinbrook Island</td>
</tr>
<tr>
<td>Hinchinbrook Island Increase in Utilisation Through Boat Trails and Facilities</td>
<td>Hinchinbrook Island is one of Australia’s best natural attractions and is world-renowned. This development would develop boating trails around the island and region along with mooring areas and camping sites to increase the tourism benefits from the island whilst minimising the impact of people on the island.</td>
<td>• May form part of a broader North Queensland boating trail</td>
</tr>
</tbody>
</table>

### Burdekin Dry Tropics Irrigation Area and Townships

<table>
<thead>
<tr>
<th>Project</th>
<th>Description</th>
<th>Comments and Conclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wetlands Wildlife Interpretive Centre (Compliment to Tyto)</td>
<td>As part of a Wetlands Interpretive Network across North Queensland a major interpretive centre would be built on a wetland in the Burdekin. The attraction would be complimentary to, and work with Tyto Visitor Information Centre and aim to ‘bookend’ the north and south of the region as a wetland trail.</td>
<td>• This project would link in with the North Queensland Wetlands Network • Whilst it is suggested the interpretive centre have a wetlands focus to work in synergy with Tyto and the proposed wetlands network in practice this project is an improved interpretive centre for the Burdekin and would showcase a range of interests in the region</td>
</tr>
<tr>
<td>Plantation Park Revitalisation and Walking Network</td>
<td>Plantation park on the southern boundary of Ayr is a popular stop for tourists travelling through on the Bruce highway. This development would improve this park for tourists and locals alike and potentially include the wetlands interpretive centre (as discussed above) as well as other new tourism attractions.</td>
<td>• The value of this project is likely to be focused on local residents however significant benefits for tourism are anticipated with Plantation Park a popular stopping point for travellers on the Bruce Highway</td>
</tr>
</tbody>
</table>
### Charters Towers Heritage Towns

<table>
<thead>
<tr>
<th>Project</th>
<th>Description</th>
<th>Comments and Conclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Art gallery for the Outback North</strong></td>
<td>Charters Towers is the capital of the rural north and has a rich character and thriving art community. This development would showcase the unique art and character from across the outback north.</td>
<td>- Charters Towers is well placed to highlight the culture of the outback North with its regional role and heritage</td>
</tr>
<tr>
<td><strong>Development of Underground Mining Interpretive Experience</strong></td>
<td>Charters Towers has a rich mining history that already attracts large numbers of tourists to the region. This development would add to the experience by providing an attraction that simulates the experience of being an underground miner.</td>
<td>- This project would be developed to build on the existing successful mining heritage attractions in Charters Towers</td>
</tr>
<tr>
<td><strong>Herveys Range Tourist Village Development</strong></td>
<td>Herveys Range is a mountain area about 30 km from Townsville. At present the area is relatively undeveloped however features a heritage teahouse that has successfully promoted the location. Herveys Range is a good day trip distance from Townsville and has a range of natural features with potential for greater tourism development. The location has potential to be developed into a tourist village featuring a cluster of developments drawing upon the day-trip market from Townsville and self-drive tourists.</td>
<td>- It is anticipated that the bulk of funds would be private investment however a public investment in supporting infrastructure will also be required</td>
</tr>
</tbody>
</table>

Historic Ravenswood, North Queensland
In order for the tourism and support infrastructure projects identified in this TOP to be realised in an effective and timely manner, a number of implementation mechanisms are necessary. Townsville Enterprise, will be responsible for managing and co-ordinating the implementation of the Plan in partnership with Tourism Queensland and State and Local Government. Townsville Enterprise will monitor progress of the Plan’s recommended projects and where necessary assist in forming project groups of relevant agencies/organisations to take the project recommendations forward.

The TOP aims to provide a clear set of priority projects for the destination to guide product development partnerships and local planning. More importantly, the Plan provides a vision and direction for future tourism development that meets the needs of the community and consumers alike.

Appendix A

5.1 Abbreviations

The following abbreviations are used in this document:

AIMS  Australian Institute of Marine Science
DIP  Department of Infrastructure and Planning
GBR  Great Barrier Reef
GBRMPA  Great Barrier Reef Marine Park Authority
GFC  Global Financial Crisis
JCU  James Cook University
LGA  Local Government Area
PIFU  Planning Information and Forecasting Unit
TOP  Regional Tourism Opportunity Plan
RTO  Regional Tourism Organisation
SWOT  Strengths, Weaknesses, Opportunities, Threats
TEL  Townsville Enterprise Limited
TQ  Tourism Queensland
VFR  Visiting Friends and Relatives
NTR  Northern Tourism Region
Appendix B: Tourism Forecasts and Scenarios

Many stakeholders consulted with for the preparation of this TOP expressed that the region has a shortage of accommodation and particularly holiday visitor focussed accommodation. An analysis of the accommodation needs in Townsville North Queensland reveals that tourism in the region may be constrained by a lack of accommodation during peak periods, however does not otherwise appear to be grossly undersupplied. Investment in tourism accommodation is not driven by needs during peak periods, but rather average occupancies across the year. As with many other regions, accommodating peak tourist loads is a challenge for Townsville North Queensland.

Intrastate domestic visitation dominates the region’s tourism market, and is relatively evenly split between holiday, VFR and business-driven visitation. International visitation makes up for a somewhat lower proportion of total visitation, with the most significant international source markets for the region between the United Kingdom and Germany. In a local context, Townsville City currently attracts the largest proportion of international visitors in Townsville North Queensland.

An historic assessment of accommodation supply in Townsville North Queensland displays that the supply of hotel, motel and serviced accommodation has not kept pace with demand over the past ten years. This is evidenced by an upward trend in the region’s occupancy rate, which has grown from 58% to approximately 68% over the past ten years. This has been impacted by high domestic construction costs that have discouraged investment in the short-term accommodation sector, and has been highlighted by the rising average room rate. Recent additions of hotel rooms in Townsville are not reflected in these figures and will likely contribute to an easing in average occupancy rates in 2009.

5.2 Room, Caravan and Camping and Aviation Requirements

The following table outlines the current visitation and accommodation to the North Queensland region and estimates the need for additional rooms required by 2017 based on growth in visitation to 2017.

Domestic visitors to the Northern Tourism Region (NTR) are forecast by Tourism Queensland to reach 1.1 million in 2017, an increase of 166,000 from an estimated 961,000 domestic visitors in 2007/08. This forecast assumes the region maintains its current share of the domestic market. New developments and major events, such as the V8 Supercars, have the potential to bring major shifts to domestic visitation to the region.

The estimates in the following table are based on the visitor growth projections by Tourism Queensland for the NTR, from which the AECgroup has estimated future accommodation and aviation needs according to historic visitor stay factors.

<table>
<thead>
<tr>
<th>Tourism Forecasts for the Northern Visitor Region</th>
<th>Current Visitation &amp; Accommodation 2007/08</th>
<th>Projected Visitation &amp; Accommodation 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hotels, motels and serviced apartments</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Visitor Nights</td>
<td>4,783,400</td>
<td>5,531,712</td>
</tr>
<tr>
<td>Share of visitor nights spent in hotels, motels and serviced apartments (%)</td>
<td>20.8</td>
<td></td>
</tr>
<tr>
<td>Average guests per room</td>
<td>1.5</td>
<td></td>
</tr>
<tr>
<td>Room occupancy rate</td>
<td>69.9</td>
<td></td>
</tr>
<tr>
<td>Room stock (June quarter 2008)</td>
<td>2,780</td>
<td>2,945</td>
</tr>
<tr>
<td>Additional rooms required by 2017 @ 70% occupancy</td>
<td></td>
<td>165</td>
</tr>
<tr>
<td>Additional rooms required by 2017 @ 65% occupancy</td>
<td></td>
<td>178</td>
</tr>
<tr>
<td>Additional rooms required by 2017 @ 60% occupancy</td>
<td></td>
<td>193</td>
</tr>
<tr>
<td><strong>Caravan and Camping Grounds</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Visitor Nights</td>
<td>4,783</td>
<td>5,532</td>
</tr>
<tr>
<td>Share of visitor nights spent in caravan parks (%)</td>
<td>37.8</td>
<td></td>
</tr>
<tr>
<td>Assumed average guests per site</td>
<td>3.0</td>
<td></td>
</tr>
<tr>
<td>Site occupancy rate</td>
<td>49.4</td>
<td></td>
</tr>
<tr>
<td>Site Stock</td>
<td>2,297</td>
<td>3,860</td>
</tr>
<tr>
<td>New sites required by 2017</td>
<td></td>
<td>1,573</td>
</tr>
<tr>
<td><strong>Forecast Aviations Requirements</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total passenger movements through Townsville Airport</td>
<td>1,365,959</td>
<td>1,673,993</td>
</tr>
<tr>
<td>Forecast average annual growth of passenger movements (2007/08-2017)</td>
<td>2.2</td>
<td></td>
</tr>
<tr>
<td>Average load factors (%)</td>
<td>76</td>
<td></td>
</tr>
<tr>
<td>Annual seat capacity</td>
<td>1,792,049</td>
<td>2,196,169</td>
</tr>
<tr>
<td>Additional seat capacity required</td>
<td></td>
<td>404,120</td>
</tr>
</tbody>
</table>

Source: Unpublished forecasts from Tourism Queensland, AECgroup
These regional forecasts are inferred from national forecasts of tourism activity over the next ten years, assuming the region’s current market share will be maintained. Given current volatility in tourism markets the underlying national forecasts should be considered as uncertain at best.

5.3 Alternative Growth Scenarios

There is potential for North Queensland to increase its share of the national and state tourism market resulting in increased demand for accommodation, caravan and camping and aviation supply.

Scenarios have been developed that assess the likely value (in 2008 dollars) of additional growth scenarios.

The scenarios are as follows:

5.3.1 **15% of overnight visitors in 2017 spend an additional $50 per stay on meals and souvenirs**

Implications:
- Retail and restaurant developments that benefit residents can also increase average visitor expenditure in the region.

<table>
<thead>
<tr>
<th>Indicative Value of Additional Retail Development for Tourists by 2017</th>
<th>Statistic</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Baseline scenario (Tourism Queensland forecasts)</strong></td>
<td>1,369,500</td>
</tr>
<tr>
<td><strong>Additional discretionary expenditure (2008 dollars, millions)</strong></td>
<td>10.3</td>
</tr>
</tbody>
</table>

Sources: AECgroup; Tourism Queensland; Tourism Research Australia

5.3.2 **5% of visitors in 2017 spend an additional $30 on nature attractions/activities**

Implications:
- The proportion of visitors undertaking nature-based activities is surprisingly low at 25%. This points to opportunities for new nature-based attractions.
- A modest increase in expenditure on nature-based activities ($30 by 5% of visitors) can deliver around $12 million in additional tourist expenditure in the region.

<table>
<thead>
<tr>
<th>Indicative Value of Developing Nature-based Attractions in 2017</th>
<th>Baseline Forecasts</th>
<th>An additional 5% of visitors spend $30 on nature-based activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors undertaking nature-based tourism</td>
<td>394,684</td>
<td>414,418</td>
</tr>
<tr>
<td>Domestic</td>
<td>169,029</td>
<td>177,481</td>
</tr>
<tr>
<td>International</td>
<td>225,655</td>
<td>236,937</td>
</tr>
<tr>
<td><strong>Additional Expenditure (2008 dollars, millions)</strong></td>
<td></td>
<td>12.4</td>
</tr>
</tbody>
</table>

Sources: AECgroup; Tourism Queensland; Tourism Research Australia

5.3.3 **10% of self-driving visitors spend an additional day touring the region at $123 per day (the average daily expenditure of domestic tourists in 2007)**

Implications:
- Were 10% of self-driving tourists to spend an additional day in the region additional accommodation capacity would be necessary to maintain occupancy rates at current levels. Assuming visitors are spread evenly throughout the year, the accommodation requirements are quite modest at around 40 additional rooms and caravan sites each.
- The value of developing self-drive infrastructure is substantial given the volume of such visitors to the region.
Indicative value of Developing Self-drive Infrastructure by 2017

<table>
<thead>
<tr>
<th>Statistic</th>
<th>Statistic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baseline scenario (Tourism Queensland forecasts)</td>
<td></td>
</tr>
<tr>
<td>Total Visitors</td>
<td>1,369,500</td>
</tr>
<tr>
<td>Domestic</td>
<td>1,126,861</td>
</tr>
<tr>
<td>International</td>
<td>242,639</td>
</tr>
<tr>
<td>Proportion of tourists that are self-driving</td>
<td>82.8</td>
</tr>
<tr>
<td>Self-driving visitors</td>
<td>1,133,946</td>
</tr>
</tbody>
</table>

Scenario: 10% of self-driving tourists spend an additional day in the region at $123 per day

- Additional visitor nights: 113,395
- Additional accommodation capacity:
  - Hotels, motels, serviced apartments: 42
  - Caravan sites: 39
- Additional expenditure (2008 dollars, millions): 13.9

Sources: AECgroup; Tourism Queensland; Tourism Research Australia

5.3.4 Growth in fly/drive tourism increases domestic visitor numbers by 5% over baseline projections in 2017 with these visitors staying for three days at an average daily expenditure of $123 per day (the average daily expenditure of domestic tourists in 2007)

Implications:
- Assuming that high-yield visitors are only willing to stay in hotels, motels, or serviced apartments the additional room stock to deliver this vision is substantial at around 200 rooms.
- Growth in aviation capacity to Townsville (seats) is relatively modest at 2.9% per annum, which is lower than growth achieved over the past ten years.
- The additional expenditure from attracting these visitors is estimated to be almost $21 million.

Indicative Value of Attracting Fly/Drive Tourists by 2017

<table>
<thead>
<tr>
<th>Statistic</th>
<th>Statistic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baseline scenario (Tourism Queensland forecasts)</td>
<td></td>
</tr>
<tr>
<td>Total Visitors</td>
<td>1,369,500</td>
</tr>
<tr>
<td>Domestic</td>
<td>1,126,861</td>
</tr>
<tr>
<td>International</td>
<td>242,639</td>
</tr>
<tr>
<td>Aviation requirements</td>
<td></td>
</tr>
<tr>
<td>Average load factor (%)</td>
<td>76</td>
</tr>
<tr>
<td>Additional seats required</td>
<td>404,120</td>
</tr>
<tr>
<td>Annual growth in seat requirements (2007/08 to 2017)</td>
<td>2.2</td>
</tr>
</tbody>
</table>

Scenario: Marketing to fly/drive tourists results in an additional 5% growth in domestic visitation by 2017. With these visitors staying for three days at $123 per day.

- Additional domestic visitors: 56,343
- Additional aircraft seats required: 154,724
- Annual growth in seat requirements (2007/08 to 2017): 2.9
- Additional accommodation capacity:
  - Hotels, motels and serviced apartments: 201
- Additional expenditure (2008 dollars, millions): 20.8

Sources: AECgroup; Tourism Queensland
5.3.5 International visitors increase from around 37% of visitation to 40% in 2017 with an assumed average daily spend of $123 per day and an average length of stay of 4 days

Implications:
The growth in international tourism is expected to generate an additional $18 million in tourism expenditure in the Townsville region. This is lower than the estimated value of growing the domestic fly/drive market, which is likely to require fewer infrastructure upgrades.

This scenario of international visitors accounting for 40% of international visitor nights is not overly optimistic. In 2006, international tourism accounted for a higher share of visitor nights in Brisbane and Tropical North Queensland (Tourism Queensland 2007).

Indicative Value of Growing International Tourism by 2017

<table>
<thead>
<tr>
<th>Statistic</th>
<th>Statistic</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Baseline scenario (Tourism Queensland forecasts)</strong></td>
<td></td>
</tr>
<tr>
<td>Total Visitor Nights</td>
<td>5,531,712</td>
</tr>
<tr>
<td>Domestic</td>
<td>3,468,354</td>
</tr>
<tr>
<td>International</td>
<td>2,063,359</td>
</tr>
<tr>
<td><strong>Share of visitor nights (%)</strong></td>
<td></td>
</tr>
<tr>
<td>Domestic</td>
<td>62.7</td>
</tr>
<tr>
<td>International</td>
<td>37.3</td>
</tr>
<tr>
<td><strong>Suppose with airport upgrades and marketing international tourists comprise 40% of visitor nights in the region at average expenditure of $123 per day</strong></td>
<td></td>
</tr>
<tr>
<td>Additional international visitors</td>
<td>149,326</td>
</tr>
<tr>
<td><strong>Additional expenditure</strong></td>
<td><strong>18.4</strong></td>
</tr>
</tbody>
</table>

Sources: AECgroup; Tourism Queensland

Tyto Wetlands, Ingham
## Appendix C – Detail on Catalyst Projects

<table>
<thead>
<tr>
<th>Project Rationale</th>
<th>Project Opportunities</th>
<th>Key Considerations and Issues</th>
<th>Likely Stakeholders</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Greater Townsville CBD Tourism Precinct</strong></td>
<td>• There are a large number of individual projects with potential in the greater Townsville CBD</td>
<td>• This project involves a number of developments across the broader CBD area that will mostly take place at opportunistic intervals</td>
<td>• Townsville City Council</td>
</tr>
<tr>
<td>• Approximately 80% of tourists to Townsville North Queensland are estimated to visit the Townsville CBD</td>
<td>• Improved connectivity of the Townsville CBD and revitalisation of run-down areas should improve the synergy of existing attractions</td>
<td>• Townsville City Council is responsible for the masterplanning and development direction for the precinct</td>
<td>• TEL</td>
</tr>
<tr>
<td>• The Townsville CBD is widely regarded to be run-down and present a very poor image to tourists</td>
<td>• The Townsville CBD is anticipated to appeal particularly to Social Fun Seekers, Unwinders and Stylish Travellers</td>
<td></td>
<td>• DIP and Planning</td>
</tr>
<tr>
<td>• There are a number of fine tourist areas in the greater Townsville CBD, however these are disjointed and considered difficult for a visitor to self-discover</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Townsville Cruise and Military Ship Terminal</strong></td>
<td>• A dedicated cruise ship terminal would aim to increase the number of cruise ship routes through North Queensland region</td>
<td>• Any potential impacts on the existing commercial Port of Townsville need to be considered</td>
<td>• Port of Townsville Limited</td>
</tr>
<tr>
<td>• Cruise shipping is a rapidly growing market in Queensland</td>
<td>• Cruise ship visits occur on dates planned well in advance enabling tourist businesses to plan to meet large spikes in demand</td>
<td></td>
<td>• TEL</td>
</tr>
<tr>
<td>• Defence ships are regular visitors to Townsville</td>
<td>• A cruise ship terminal could serve as a base to develop micro-cruises in the region</td>
<td></td>
<td>• TQ</td>
</tr>
<tr>
<td>• The North Queensland coast has a range of attractions for cruise ships</td>
<td>• Anticipated to appeal particularly to Stylish Travellers, Unwinders, Active Explorers</td>
<td></td>
<td>• Townsville City Council</td>
</tr>
<tr>
<td>• The ability to rapidly disembark cruise ship passengers is important to the level of spending and activities the passengers undertake in the region</td>
<td></td>
<td></td>
<td>• DIP</td>
</tr>
<tr>
<td><strong>Townsville Business Events Centre</strong></td>
<td>• Sustain and grown business tourism to Townsville North Queensland</td>
<td>• The location of the centre will need to be in the Townsville CBD</td>
<td>• TEL</td>
</tr>
<tr>
<td>• Townsville is the largest city in tropical Australia and attracts a large business visitation</td>
<td>• Retain local business events expenditure</td>
<td></td>
<td>• Townsville City Council</td>
</tr>
<tr>
<td>• The existing Townsville Entertainment and Convention Centre is considered a poor compromise for significant business events</td>
<td>• Increase the profile of Townsville North Queensland</td>
<td></td>
<td>• TQ</td>
</tr>
<tr>
<td>• A dedicated business events centre is considered a necessity for a city of the size and function of Townsville</td>
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</tbody>
</table>
## Implementation

<table>
<thead>
<tr>
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</tr>
</thead>
</table>
| **Townsville Artificial Reef** | • Townsville has a strong reputation for the Great Barrier Reef and marine science  
• Townsville has an excellent reef aquarium and adventure reef options (e.g. S.S. Yongala) however lacks accessible day-trip reefs for snorkelling and basic diving  
• Engineered artificial reefs have been established in other parts of the world for tourism purposes | • A suitably located artificial reef would enable reef day-trips to be conducted from Townsville  
• There may be opportunities to develop marine biology trials/experiments with an artificial reef that would be of interest to tourists  
• In the USA, some artificial reefs are installed progressively, with sections sponsored and named by businesses and organizations  
• Anticipated to appeal particularly to Active Explorers and Unwinders | • TEL  
• TQ  
• Townsville City Council  
• GBRMPA  
• AIMS  
• JCU |

| **Magnetic Island as a Sustainable Destination** | • Magnetic Island is already a ‘Solar Suburb’ as part of Townsville’s ‘Solar City’ project  
• Much of the Magnetic Island community is highly eco-aware  
• Currently, Magnetic Island has little to visibly distinguish itself as a sustainable destination | • As opposed to other tourist destinations Magnetic Island would aim to showcase a complete sustainable community  
• Anticipated to appeal particularly to Unwinders, Self Discoverers, Connectors | • TEL  
• Townsville City Council  
• Magnetic Island Community  
• JCU |

| **White Mountains National Park Wilderness Camping and Walking** | • The natural and cultural features of White Mountains National Park have the potential to develop national and international recognition  
• Similar high value attraction in remote areas in Australia have been successfully developed with significant tourism benefits  
• Development of camping infrastructure and trails in the park is relatively simple due to the dry climate and vegetation | • Development of a major, iconic attraction for Townsville North Queensland  
• Project has significant Indigenous tourism development opportunities  
• Over time there may be opportunities to develop further infrastructure based on the park, such as accommodation and tourist parks  
• Nearest similar product would be Carnarvon Gorge in Central Queensland, White Mountains would differentiate Townsville North Queensland from Tropical North Queensland and Mackay-Whitsundays  
• Anticipated to appeal particularly to Self Discoverers, Unwinders and Active Explorers | • Charters Towers Regional Council  
• Local Landholders  
• TEL  
• TQ  
• Queensland Parks and Wildlife |
### Palm Island Adventure and Camping Trek

<table>
<thead>
<tr>
<th>Project Rationale</th>
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</tr>
</thead>
<tbody>
<tr>
<td>• Palm Island is an area of abundant natural beauty with beaches and peaks similar to nearby Hinchinbrook Island</td>
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<tr>
<td>• Hinchinbrook Island is well-regarded and currently utilised at capacity</td>
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<tr>
<td>• Palm Island is in need of economic development with community interest in developing the tourism industry</td>
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<tr>
<td>• Palm Island is not National Park, with less regulatory processes to developing a walking trail</td>
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<tr>
<td>• An iconic walking trail on Palm Island would likely be of a similar length to the Thorsborne Trail</td>
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<tr>
<td>• There is opportunities to leverage Indigenous tourism on the island with the development of the trail, with developments such as guided interpretive walks, guided fishing and accommodation housing at the start and end of the walk</td>
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<tr>
<td>• An iconic trail could be marketing along with Hinchinbrook Island, leveraging from its existing reputation</td>
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<tr>
<td>• Anticipated to appeal particularly to Active Explorers and Self Discoverers</td>
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<tr>
<td>• Suitable camping / hut areas with appropriate facilities will need to be developed at points along the trail</td>
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<tr>
<td>• Accommodation in the Palm Island township for walkers at the start/end of their walks could be added</td>
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<tr>
<td>• The trail will likely need to be strongly promoted to overcome any security concerns regarding Palm Island</td>
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<td></td>
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<tr>
<td>• TEL</td>
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<tr>
<td>• Palm Island Council</td>
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<tr>
<td>• TQ</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• North Queensland Bushwalking clubs</td>
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</tbody>
</table>

### Wallaman Falls EcoResort

<table>
<thead>
<tr>
<th>Project Rationale</th>
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<th>Key Considerations and Issues</th>
<th>Likely Stakeholders</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Wallaman Falls is the largest single drop waterfall in Australia, with a number of walking trails, wildlife and a cool climate</td>
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<tr>
<td>• Camping at the falls is currently reasonably popular, however there are no fixed accommodation options</td>
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<tr>
<td>• An EcoResort would cater for the inter-regional weekend market as well as other tourists</td>
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<tr>
<td>• An EcoResort would act as a bookend to the Great Tropical Walk, as does Cradle Mountain lodge and Lake St Clair lodge for the Overland Track</td>
<td></td>
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</tr>
<tr>
<td>• An EcoResort would also have the potential to improve Wallaman Falls as a daytrip destination with the inclusion of a café / restaurant</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Anticipated to appeal particularly to Unwinders, Self Discoverers, Connectors and Active Explorers</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>• Environmental considerations of developing in a Wet Tropics area will need to be overcome</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>• Continued improvements to the quality of the road to Wallaman Falls should be considered</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>• Success of the development will depend significantly on the quality of the private developer / operator</td>
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</tr>
<tr>
<td>• Hinchinbrook Shire Council</td>
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<tr>
<td>• TEL</td>
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<td></td>
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<tr>
<td>• TQ</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>• Queensland Parks and Wildlife</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Wet Tropics Authority</td>
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</tbody>
</table>
### Project Rationale

- There is strong demand from the local market in Townsville North Queensland for off-road facilities that is currently met in large part through illegal use of accessible sites
- A large proportion of existing visitors to Townsville North Queensland are interested in adventure activities
- Suitable sites with interesting terrain exist across Townsville North Queensland
- North Queensland’s weather suits a high rate of utilization for an off-road adventure facility

### Project Opportunities

- The project would add further to Townsville North Queensland’s growing reputation as a sporting and recreational centre for regional Queensland
- A suitable development could diversify into a wide range of adventure activities
- The adventure park would complement adventure activities available in the Tropical North Queensland and Mackay-Whitsundays rather than be a direct competitor
- The adventure park could develop a range of events and competitions
- Anticipated to appeal particularly to Active Explorers

### Key Considerations and Issues

- This project is primarily a private development and will require a suitable and willing developer / operator
- The quality of the operator will be a significant determinant of the success of the venture
- An ideal site would have good proximity to Townsville, a variety of terrain, but be well buffered from surrounding landholders

### Likely Stakeholders

- TEL
- North Queensland Motorsports and Adventure clubs

## Off-road Adventure Park

<table>
<thead>
<tr>
<th>Project Rationale</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Off-road Adventure Park</td>
<td>The project would add further to Townsville North Queensland’s growing reputation as a sporting and recreational centre for regional Queensland</td>
<td>This project is primarily a private development and will require a suitable and willing developer / operator</td>
<td>TEL</td>
</tr>
<tr>
<td></td>
<td>A suitable development could diversify into a wide range of adventure activities</td>
<td>The quality of the operator will be a significant determinant of the success of the venture</td>
<td>North Queensland Motorsports and Adventure clubs</td>
</tr>
<tr>
<td></td>
<td>The adventure park would complement adventure activities available in the Tropical North Queensland and Mackay-Whitsundays rather than be a direct competitor</td>
<td>An ideal site would have good proximity to Townsville, a variety of terrain, but be well buffered from surrounding landholders</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The adventure park could develop a range of events and competitions</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Anticipated to appeal particularly to Active Explorers</td>
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<td></td>
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</tbody>
</table>

## Tourist Parks Cluster

<table>
<thead>
<tr>
<th>Project Rationale</th>
<th>Project Opportunities</th>
<th>Key Considerations and Issues</th>
<th>Likely Stakeholders</th>
</tr>
</thead>
<tbody>
<tr>
<td>The demand for sites from caravans and motorhomes is anticipated to be strong in North Queensland over the next 10 years</td>
<td>To ensure suitable accommodation remains available in Townsville North Queensland to meet demand</td>
<td>Tourist parks need to be suitably located to infrastructure and attractions to be viable</td>
<td>NQ5 association of local governments</td>
</tr>
<tr>
<td>Tourist parks are currently being lost from the region due to redevelopment opportunities</td>
<td>To ensure suitable areas for tourist parks in Townsville North Queensland are preserved and provided appropriate development opportunity</td>
<td>Planning should be flexible to allow for changes to demand scenarios in the future</td>
<td>TEL</td>
</tr>
<tr>
<td>Modern tourist parks offer a range of facilities, accommodation options and activities and service a broad range of the market</td>
<td>To ensure tourist park planning across the region is coordinated</td>
<td></td>
<td>DIP</td>
</tr>
<tr>
<td></td>
<td>To improve the appeal of Townsville North Queensland as a family holiday destination particularly for intra-state visitors</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Anticipated to appeal particularly to Unwinders</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Coast and Islands Boating Trail

- Many of Townsville North Queensland’s most attractive features are located along its coast and islands
- Boating trails have been extensively developed across the USA in recent years
- Boating trails require relatively limited infrastructure development

<table>
<thead>
<tr>
<th>Project Rationale</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Townsville North Queensland boating trail would appear to be the first of its kind in Australia and could develop ‘first mover’ advantage as an iconic attraction</td>
</tr>
<tr>
<td>A boating trail would bring tourists through existing as well as under-utilised tourism areas such as Cape Cleveland, Magnetic Island, Palm Island and Lucinda</td>
</tr>
<tr>
<td>Tour operators could develop routes along the boating trail such as micro-cruises or the guided boat tours (such as the existing Lucinda to Mission Beach sea kayak tour)</td>
</tr>
<tr>
<td>Anticipated to appeal particularly to Active Explorers and Social Fun Seekers</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Key Considerations and Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resources for the ongoing maintenance of camping / mooring areas will need to be considered</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Likely Stakeholders</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEL</td>
</tr>
<tr>
<td>GBRMPA</td>
</tr>
<tr>
<td>TQ</td>
</tr>
<tr>
<td>Queensland Parks and Wildlife</td>
</tr>
</tbody>
</table>

### Indigenous Rock Art and Relics Trail

- Townsville North Queensland has a variety of Indigenous culture assets across the region
- These assets are perhaps superior to surrounding regions
- Many of the assets are relatively accessible, although generally not publicly accessible at present

<table>
<thead>
<tr>
<th>Project Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>High interest in Indigenous culture amongst international visitors,</td>
</tr>
<tr>
<td>Indigenous culture attractions across the region would help to capture the large existing drive-through market in Townsville North Queensland for longer periods</td>
</tr>
<tr>
<td>Accessible genuine Townsville Indigenous culture attractions would be a differentiating iconic characteristic compared to the Tropical North Queensland and Mackay-Whitsundays regions</td>
</tr>
<tr>
<td>Anticipated to appeal particularly to Connectors, Self Discoverers and Active Explorers</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Key Considerations and Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measures to provide security to any Indigenous assets open for visitation by the public is essential</td>
</tr>
<tr>
<td>Potential cultural barriers to visitation of Indigenous cultural sites may exist and will need to be negotiated with traditional owners</td>
</tr>
<tr>
<td>Sites that are near to existing self-driving routes should be considered to have the greatest potential</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Likely Stakeholders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Townsville Cultural Centre</td>
</tr>
<tr>
<td>TEL</td>
</tr>
<tr>
<td>TQ</td>
</tr>
<tr>
<td>Queensland Parks and Wildlife</td>
</tr>
<tr>
<td>JCU</td>
</tr>
</tbody>
</table>
### Project Rationale
- Cromarty Wetlands has significant wildlife and scenic values that are considered by some to rival Kakadu.
- Cromarty Wetlands are highly accessible from Townsville, being within 40km by road from the CBD.
- Market research of tourists in Townsville North Queensland indicates a very high interest in visiting the region’s wetlands.
- Townsville North Queensland as a large number and diverse range of wetlands that can be linked as a trail.
- The number and diversity of wetlands in Townsville North Queensland is superior to surrounding regions.
- Tyto Wetlands in Ingham has already been successfully developed for tourists.

### Project Opportunities
- Wetlands, particularly the wildlife, is of high interest to international travellers.
- Strong special interest market for bird watching.
- Many wetlands are suitably located for the large existing self-drive market and would help to lengthen their stays.
- Cromarty Wetlands could be promoted as a more accessible alternative to Kakadu.
- Diversity and accessibility of wetlands in Townsville North Queensland would be a differentiating characteristic compared to the Far North and Mackay-Whitsundays regions.
- Anticipated to appeal particularly to Connectors, and Active Explorers.

### Key Considerations and Issues
- Townsville North Queensland Wetlands are highly seasonal – with a need to educate visitors as to the features of the wetlands over the seasons.
- Any developments will need to undertake environmental approvals processes.
- Ongoing management of sites and protection from damage and weed infestation should be considered.

### Likely Stakeholders
- TEL
- TQ
- Local Governments
- Private Landholders
- NQ Dry Tropics
- Queensland Parks and Wildlife

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Crystal Creek, Paluma