EXECUTIVE SUMMARY
The Bundaberg North Burnett 2020 Destination Tourism Plan serves to achieve two key strategic goals:

- Set an agreed direction and priorities for growth, development and marketing to guide the region to achieve its target tourism growth and economic outcomes
- Clearly identify priority projects that will have the greatest impact and provide significant opportunity for commercial outcomes, act as a catalyst for new development and marketing, and are strategically focused on leveraging the key strengths of the destination

The Destination Tourism Plan sets a firm agreed direction for all stakeholders for the development of the destination and the achievement of the destination’s ambitious 2020 visitor expenditure targets.

These priority opportunities have been identified through an intensive program of community, business, industry and stakeholder consultations. These consultations have been focused on identifying projects and actions that have proponents in place to lead and advocate for their advancement. It is important to note at this point that the plan does not include a comprehensive listing of all projects and activities that can and will be undertaken within the region but is a filtered, prioritised and actionable plan that will provide a major stimulus across the region and economic benefits for the community.

The plan has identified seven key opportunities areas for the Bundaberg North Burnett; these cover all aspects of destination development.

- Fully embracing the digital economy
- Touring Routes and supporting infrastructure
- Product development influenced by the region’s culinary experiences and Bundaberg North Burnett characters
- Southern Great Barrier Reef marketing and product development
- Mon Repos and development of a year round turtle experience
- Development of a multi-purpose centre in Bundaberg
- Day cruise operation to Lady Musgrave Island

The challenges for the Bundaberg North Burnett Region associated with achieving the 2020 visitor expenditure goals and implementing the opportunities identified above are.

- Truly differentiated product that is not found elsewhere and which is market place influence to drive demand
- Investment attraction
- Profitability and sustainability
- Natural events
- Commanding influence to drive strategic outcomes
- Lack of an events strategy
- Lack of reliable visitor and expenditure data to measure and track impact

The Destination Tourism Plan is a “living” plan which will be reviewed and updated on a yearly basis to ensure as priorities are achieved and new projects and priorities are identified, the destination evolves and opportunities are presented. The Destination Tourism Plan will always be contemporary and strategically focused.
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SETTING THE SCENE
The Destination Tourism Plan for the Bundaberg and North Burnett region has been developed to provide a definitive direction for tourism within the region and lay the platform for the achievement of the ambitious Tourism 2020 targets.

The report highlights the resources and investment required to create a sustainable and competitive tourism environment in Bundaberg North Burnett, recognising localised opportunities and challenges and the destination’s unique tourism assets and potential.

The Destination Tourism Plan draws together plans that have previously developed through other planning processes, destination research and future trends, to develop priority strategies and actions that will be the centrepiece of all planning for tourism development, marketing and events with the aim of achieving the 2020 targets.

The purpose of the Destination Tourism Plan is not to provide an exhaustive list of priorities and projects across the region, but to provide focus on those that will have the biggest impact for the region, the tourism industry and the broader community.

This Destination Tourism Plan will be an evolutionary document, which takes into account the significant level of consultation and planning undertaken by various stakeholders in the past 5 years. Most recently the Bundaberg North Burnett Tourism Summit, which invited both industry and the broader community to participate in a discussion about the future of tourism within the region.

TOURISM 2020 TARGETS
Tourism 2020 targets have originated for Australia as a whole and then trickle down to the contribution each region and destination can play in achieving these goals. For Australia, this vision means doubling visitor expenditure from $70 billion per year to between $115 billion and $140 billion, by 2020. This represents an average annual growth rate of between 3.8% and 5.4%. This compares to the recent historic trend growth of 1.4%, which would result in overnight tourism expenditure of around $97 billion in 2020. All states and territories have adopted Tourism 2020 goals through the Tourism Ministers Meeting Forum.

WHAT THIS MEANS FOR QUEENSLAND
For Queensland’s tourism industry the Tourism 2020 goal targets are:

- Increasing international visitor nights by 24% above the forecast growth
- Increasing domestic visitor nights by 29% above the forecast growth
- Increasing international aircraft movements by 21,190 to 57,130
- Increasing hotel rooms by 25,466 in order to meet demand at existing occupancy rates
- Increasing the workforce by 56,500 (18,470 of which would be skilled workers), which is twice the anticipated growth rate.

Visitor composition in also expected to change from traditional high-yielding markets like Japan, to lower yielding emerging markets such as China and India. As a result, Queensland needs to:

- Stop the decrease in visitation from high-yielding markets
- Encourage lower-yielding visitors from emerging markets to increase their spend or extend their stay
- Improve Queensland’s price competitiveness and value proposition relative to other international destinations
- Be ready for an increase in international visitation to city destinations.
WHAT THIS MEANS FOR THE BUNDABERG NORTH BURNETT REGION

The Bundaberg North Burnett 2020 Targets have been set through reviewing historical data and analysing tourism forecasting data produced by Tourism Research Australia (TRA).

The ambitious visitor expenditure target for the Bundaberg North Burnett aims for a doubling of visitor expenditure by 2020.

<table>
<thead>
<tr>
<th>Target</th>
<th>Expenditure 2020</th>
<th>Target Expenditure 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$281,000,000</td>
<td>$551,000,000</td>
</tr>
<tr>
<td>10 year growth required to meet expenditure figure</td>
<td>95.8%</td>
<td></td>
</tr>
</tbody>
</table>


This report sets out a number of scenarios and actions that will move the destination towards these targets. It also identifies a number of challenges that need to be addressed to aid growth. Flooding events across the region in 2010/11 and 2013 have affected tourism (particularly international) in a very negative way and made for a challenging start to the process which will make it harder to reach the targets.

The empirical data available for the Bundaberg North Burnett region is limited and does not allow for rigorous interrogation and scenario development. The statistics available have been used to paint a picture of the business of tourism in the region and the current visitation.

ROLE OF TOURISM AND EVENTS IN OUR COMMUNITY

To the year ended June 2013 tourism contributed 9.5% to the Gross Regional Product or $779 million in economic output to the Bundaberg North Burnett economy.

Visitor numbers across the region have remained relatively static in real terms over the period from 2007-2013. However, an increase in tourism’s economic contribution indicates a change in the economic base of the region and a diversification of the economy. It also places increased importance on the continued health and growth of the Tourism Sector within the broader region.

According to Lawrence Consulting, tourism also supports 6,548 jobs in the region. These roles are focused in the hospitality and accommodation sectors. This is approximately 15% of total employment within the Bundaberg region.

Other major industries within the broader region include agriculture, aviation, fishing and agriculture related manufacturing. Each of these industries plays a significant role in the community and underpins the fabric and brand of the region and the visitor experience. In addition, the agricultural sector draws a seasonal workforce of international travellers to the region for fruit picking. These workers not only provide an economic contribution to tourism across Bundaberg and North Burnett, but also provide essential labour for the harvest.

There are regional differences in the relative importance of tourism among communities and Council areas. The coastal towns and highway communities within the region of Childers, Bundaberg, Bargara and Woodgate have a stronger economic reliance on tourism. However, it is a consistent view across the whole region that continued focus on tourism development and visitation provides significant opportunities for all communities.

Community Perceptions

Research undertaken by TEQ in 2013 into community perceptions and social impacts of tourism, reveals that local residents have an overall positive feeling towards tourists with 68% saying they like tourists. In addition, 67% indicate they are happy with continued growth in visitor numbers, with 91% agreeing that festivals and events attract tourists and raise the profile of the destination. 74% of residents want more tourists and 93% believe that tourism brings important economic benefits.

Bundaberg North Burnett residents see the positive benefits of tourism as:-

- Greater cultural diversity
- Important economic benefits
- Increased regional profile.
ABOUT OUR DESTINATION
The Bundaberg North Burnett region encompasses the Bundaberg Regional Council and North Burnett Regional Council areas.
### CURRENT DESTINATION SNAPSHOT

| Population         | Bundaberg Regional Council area – 97,762  
|                   | North Burnett Regional Council area – 10,832 |
| Size               | Bundaberg Regional Council area – 6,449 sq km  
|                   | North Burnett Regional Council area – 20,000 sq km |
| Major Industries   | Sugar, agriculture, forestry, tourism, fishing, horticulture, citrus, cattle and service industry |
| Access             | Bundaberg Port Marina, Queensland Rail Travel Train, Greyhound Coaches, Premier Coaches, Callide Coaches, Jena Boran Coaches |
| Aviation           | QantasLink and Virgin Australia – Brisbane/Bundaberg/Brisbane |
| Great Barrier Reef Access (Lady Elliot Island) | Daily flights to Lady Elliot Island are available from Bundaberg, Hervey Bay, Sunshine Coast, Brisbane and the Gold Coast |
| Nature based attractions | Turtle nesting and hatching (November to March), Lady Elliot Island and fringing reefs, walking trails |
| Built Tourist Attractions | Mon Repos Visitor Centre, Bundaberg Rum Distillery, Bundaberg Brewed Drinks, Hinkler Hall of Aviation, RM Williams Australian Bush Learning Centre, dams, art galleries, museums, wineries, farm gate stalls, orchards, historical attractions, markets, built railway bridges, Mulgildie Bunyip (statue), The Big Orange, Bundy Bowl & Leisure Centre |
| Special Interest Activities | Fishing, bushwalking and diving |
| National Parks & State Forests | Cania Gorge NP, Kinkuna NP, Burrum Coast NP, Auburn River NP, Mount Walsh NP, Good Night Scrub NP, Coalstoun Lakes NP, Bania NP, Littabella NP, Cordalba NP, Bingera NP, Woowoonga NP, Wongi NP, Ban Ban NP, Beninbi NP, Koombit Tops NP, Dawes NP, Mon Repos Conservation Park, Mouth of Kolan River Conservation Park, Tolderodden Conservation Park, Coominglah SF, Cordalba SF, Kalpowar SF, Monduran SF, Yarrol SF, Yule SF, Redbank SF, Rockybar SF, Yerilla SF, Heffernan SF, Halloran SF, Delembra SF, Dykehead SF, Pile Gully SF, Koko SF and Allies Creek SF |
| Drive Routes       | Australia’s Country Way (Burnett Highway), Bruce Highway and Rural Getaway |
| Key Tourism Events | Childers Festival, Crush Festival, Gayndah Orange Festival, Cane2Coral Fun Run, Bundy Flavours, Bundaberg Cup, Autumn Sounds, Rowing Championships, Monduran Fishing Classic, Lake Cania Fishing Competition, National Polocrosse, Taste of the Burnett Multicultural Festival, Bush Spirit Festival, Dairy Festival, Bass Fishing Competition, Mundubbera 7-a-side Cricket |
| Visitor Information Services | Visitor Information Centres are located at: Bundaberg, Gin Gin, Childers and Eidsvold |
Southern Great Barrier Reef
“Southern Great Barrier Reef” is a unifying marketing platform that links the Regional Tourism Organisations of Bundaberg North Burnett, the Gladstone Region and Capricorn Region. The Southern Great Barrier Reef is the third iteration of a marketing platform that links these regions, the first two being Central Queensland and the Reef to Outback Trail.

There is cross-regional agreement that leveraging the strong consumer proposition of the “Southern Great Barrier Reef” provides individual regions with the best opportunity to grow visitation through collaboration and joint marketing.

Bundaberg currently receives approximately 29% of total visitation to the Southern Great Barrier Reef area with a higher percentage of holiday (leisure) visitation.

<table>
<thead>
<tr>
<th>Purpose of Travel</th>
<th>Bundaberg Visitor Numbers</th>
<th>Southern Great Barrier Reef Visitor Numbers</th>
<th>Bundaberg as a Percentage of Southern Great Barrier Reef</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday (Leisure)</td>
<td>221,000</td>
<td>520,000</td>
<td>42%</td>
</tr>
<tr>
<td>Visiting Friends &amp; Relatives</td>
<td>197,000</td>
<td>586,000</td>
<td>33%</td>
</tr>
<tr>
<td>Business</td>
<td>102,000</td>
<td>394,000</td>
<td>25%</td>
</tr>
<tr>
<td>Other</td>
<td>n/p</td>
<td>127,000</td>
<td>n/a</td>
</tr>
<tr>
<td></td>
<td>520,000</td>
<td>1,754,000</td>
<td>29%</td>
</tr>
</tbody>
</table>
(Source: Domestic Tourism Snapshot for the year ended September 2013)

Southern Great Barrier Reef Positioning
Southern Great Barrier Reef is best known for being a place where people can feel relaxed, leave the cares of the world behind, have the freedom to be who they want to be, to reflect, recharge, refresh and revitalise (Source: Brand Health Report Southern Great Barrier Reef, 2013, TEQ).

The competitive position for the Southern Great Barrier Reef against other Great Barrier Reef destinations is that it is a destination where visitors can feel the awe of discovering stunning, secluded reef that is within reach. This is supported by the following proof points:-

- Southern Great Barrier Reef reflects the feeling you get from being up close and personal with the quality and size of the marine life, as well as the sheer beauty of the place
- Reflects visitors’ desire to be adventurous and less mainstream when experiencing the reef
- Captures the small scale, intimate nature of the experience
- The Southern Great Barrier Reef captures the WOW factor reinforcing both its beauty and the awe it inspires.

As such, marketing and product development need to emphasise the following consumer benefits:-

- The accessibility and adventurous feel of the destination
- A genuine feeling of an intrepid adventure
- The feeling of discovery and of the pristine authenticity that will make visitors feel proud to have been there and provides bragging rights for having done something few people do.

Markets
To date the Southern Great Barrier Reef platform has been primarily utilised in the intrastate and New Zealand markets and has produced positive and encouraging results. In addition, marketing has been undertaken through digital tools to international markets and distribution channels. A SGBR Touring Guide has been produced to assist dispersal of visitors throughout the country and hinterland areas.

Market Potential
A greater focus on promotion of the Southern Great Barrier Reef in Interstate and International markets will provide a significant growth opportunity given the challenge of doubling visitor expenditure by 2020.

The incorporation of fishing (offshore and inland) experiences into the Southern Great Barrier Reef messaging is also seen as integral to reaching growth targets and improving the opportunities for collaboration.
Product Development
It is recognised that to fully realise the growth potential of the Southern Great Barrier Reef Platform each of the regions needs to undertake product development. For the Bundaberg region specifically the following are the priority projects:

- Re-establishment of a day tour from Bundaberg to Lady Musgrave Island on the Southern Great Barrier Reef
- Development of the Port of Bundaberg
- Redevelopment of the Mon Repos Turtle Centre
- Redevelopment of Bundaberg Rum Distillery Visitor Centre
- Development of Digital Platform
- Development of a 4-Star Accommodation Facility
- Development of Culinary Tourism

Details of SGBR marketing and development strategies and actions are outlined in the Strategy and Action Section.

DESTINATION TOURISM PERCEPTIONS
While Bundaberg may have strong brand name recognition due to its association with the many brands named after the town, awareness as a tourism destination and the reasons to visit are not as well known in any market other than regional Queensland. These current marketplace perceptions will only generate organic growth of traditional markets over the coming years unless Bundaberg leverages the Southern Great Barrier Reef brand.

This lack of awareness and strong differentiation inhibits the delivery of a compelling consumer message which would facilitate:

- Increased visitor numbers as people will travel for a specific purpose or to undertake a specific activity such as visiting the Southern Great Barrier Reef
- Increased length of stay and regional dispersal
- Better opportunities to market niche products under a strong consumer message.

COMPETITOR ANALYSIS
The Bundaberg North Burnett competitor set is based around locations and destinations that have similar hero experiences.

Competition for visitation comes from other destinations whose destination experience incorporates:

- Great Barrier Reef access with a focus on low impact and intimate experiences experienced by few
- A coastal and country combination with a focus on touring throughout the region
- Nearby regional centres of Rockhampton, Gladstone, Hervey Bay and Maryborough
- Established culinary hubs focusing on locally grown produce
- Destinations that require large numbers of seasonal workers
- Towns that offer an Australian beachside experience
- Destinations focused on exploration of the regional natural assets and towns.

Against this competitive backdrop Bundaberg North Burnett region’s competitive advantage as a leisure tourism region destination lies in the following areas:

- Accessible and world class Turtle Rookery in Mon Repos
- Location on the Southern Great Barrier Reef
- Bundaberg’s reputation developed through town name branded products such as Bundaberg Rum, Bundaberg Ginger Beer and Bundaberg Sugar
- Reputation for employment of seasonal workers in Bundaberg and the North Burnett
- Local produce and the growing culinary experience using locally sourced produce.

The brand name of Bundaberg North Burnett positions the region strongly in attracting incremental visitation from competitor destinations, combined with the significant drawcard of the world class Mon Repos Turtle Rookery, places the destination in a strong competitive position.

To fully realise these competitive advantages, investment needs to be made to strengthen the Southern Great Barrier Reef product offering and improve the governance of the employment of seasonal workers.
WHERE ARE WE NOW?

VISION
To become globally recognised as the place visitors go to immerse themselves in a world-class turtle conservation experience and as the gateway to the Southern Great Barrier Reef.

VISITATION TO BUNDABERG NORTH BURNETT

HISTORICAL POSITION
International visitor numbers have not grown in the Bundaberg region over the last decade. Indeed there is some evidence of a longer-term decline in international visitors emerging. A decrease of 23% is found in 2010-11 when compared against 1999-2000, however this has been offset by an increase in average length of stay. Note the effect of the flooding in 2010-11.

While there is some year-on-year variability, the Bundaberg tourism region ended 2010-11 with roughly the same total number of domestic overnight visitors as in 1999-2000. Only the domestic day market showed positive performance over the past decade, experiencing 1% compound annual growth over the decade, this was largely dictated by a strong upsurge in visitor numbers over 2007-08 to 2009-10.

Source: Deloitte Access Economics

HISTORICAL DRIVERS OF VISITATION TO THE BUNDABERG NORTH BURNETT REGION
Visitation and associated expenditure in the Bundaberg North Burnett region have been influenced by the following factors:

- The international youth market has largely been driven by work opportunities (fruit and vegetable picking) in the region
- Traditional beach holidays for Australian families are a key motivator in visitation to seaside locations such as Bargara and Woodgate
- The long haul touring market has been the key driver for the region as a whole and represents the vast majority of visitation for the areas of the North Burnett (Australia’s Country Way and Rural Getaway) and towns along the Bruce Highway
- Bundaberg’s position as a regional centre plays a significant role in attracting day and overnight visitors
- Travel for the purpose of visiting friends and relatives also plays a significant role in visitation to the region.

CURRENT VISITATION TRENDS

- Bundaberg North Burnett region is beginning to see a small increase in visitation from Korea, Singapore, Malaysia and New Zealand
- The international drive market to the region is showing strong growth patterns
- There is change in the countries from which seasonal workers are coming, with an increase from the Asian marketplace both in the Bundaberg and North Burnett areas
- The reputation of the Mon Repos Turtle Rookery is growing rapidly and the opportunity to experience the turtles nesting and hatching is making overnight stays in Bundaberg a must for travellers.

Future expectations from industry see the balance of visitors to the region changing, with an increase in international visitation towards 2020. This view is reflected in Deloitte Access Economics’ “Queensland Tourism - Industry Outlook and Potential to 2020”.

While statistical data is not available on specific segments of the market, this feedback is consistent across the industry and operators.
VISITOR PROFILE TO BUNDABERG NORTH BURNETT

Reliable visitor data for the Bundaberg North Burnett region is limited. The profile data contained below is an average over the four years December 2009 to December 2012. This indicative data provides an insight into visitation to the region.

- On average 463,000 visitors travelled to Bundaberg and 93,000 visited the North Burnett – a total of 556,000 visitors
- On average they stay 3.4 nights in Bundaberg and 2.9 in the North Burnett
- On average the total spend per year in Bundaberg is $196,000,000 and $33,000,000 for North Burnett.

<table>
<thead>
<tr>
<th>Purpose of Travel</th>
<th>Bundaberg</th>
<th>North Burnett</th>
<th>Queensland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>39%</td>
<td>41%</td>
<td>44%</td>
</tr>
<tr>
<td>Visiting Friends and Relatives</td>
<td>38%</td>
<td>23%</td>
<td>33%</td>
</tr>
<tr>
<td>Business</td>
<td>16%</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
<td>15%</td>
<td>6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Origin of Visitors</th>
<th>Bundaberg</th>
<th>North Burnett</th>
<th>Queensland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional Queensland</td>
<td>53%</td>
<td>71%</td>
<td>35%</td>
</tr>
<tr>
<td>Brisbane</td>
<td>32%</td>
<td>23%</td>
<td>54%</td>
</tr>
<tr>
<td>Interstate</td>
<td>15%</td>
<td>6%</td>
<td>46%</td>
</tr>
<tr>
<td>International</td>
<td>40,000</td>
<td>n/p</td>
<td>1,994,000</td>
</tr>
</tbody>
</table>

The Top 5 Activities Undertaken While Visiting

<table>
<thead>
<tr>
<th>Bundaberg</th>
<th>North Burnett</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting Friends and Relatives</td>
<td>Visiting National Parks</td>
</tr>
<tr>
<td>Eating out</td>
<td>Visiting Friends and Relatives</td>
</tr>
<tr>
<td>Going to the Beach</td>
<td>Eating out</td>
</tr>
<tr>
<td>General sightseeing</td>
<td>Bushwalking or rainforest walks</td>
</tr>
<tr>
<td>Shopping</td>
<td>General sightseeing</td>
</tr>
</tbody>
</table>

Activities listed in order of preference

STRATEGIC MARKETING PLATFORM

Target Market Priorities – 2013

<table>
<thead>
<tr>
<th>400km regional market</th>
<th>SEQ</th>
<th>Regional NSW/VIC</th>
<th>SYD/MEL</th>
<th>International – West</th>
<th>International – East</th>
</tr>
</thead>
<tbody>
<tr>
<td>Young Couples</td>
<td>A</td>
<td>A</td>
<td></td>
<td>A</td>
<td>C</td>
</tr>
<tr>
<td>International Working Holiday Makers</td>
<td>A</td>
<td>A</td>
<td></td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>Grey Nomads</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>Older Couples</td>
<td>A</td>
<td>A</td>
<td></td>
<td>A</td>
<td>C</td>
</tr>
<tr>
<td>Families</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>C</td>
</tr>
<tr>
<td>Southern Great Barrier Reef</td>
<td>B</td>
<td>A</td>
<td>A</td>
<td>B</td>
<td>B</td>
</tr>
<tr>
<td>Australia’s Country Way</td>
<td>A</td>
<td>A</td>
<td></td>
<td>A</td>
<td>A</td>
</tr>
<tr>
<td>Sporting Groups</td>
<td>B</td>
<td>B</td>
<td>B</td>
<td>B</td>
<td>B</td>
</tr>
<tr>
<td>Fishing Market</td>
<td></td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>C</td>
</tr>
<tr>
<td>Events</td>
<td>A</td>
<td>C</td>
<td></td>
<td>A</td>
<td>C</td>
</tr>
<tr>
<td>School Groups</td>
<td>B</td>
<td>B</td>
<td></td>
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<td>Meetings</td>
<td>C</td>
<td>C</td>
<td></td>
<td>C</td>
<td>C</td>
</tr>
<tr>
<td>Visiting Friends and Relatives</td>
<td>A</td>
<td></td>
<td></td>
<td>A</td>
<td>A</td>
</tr>
</tbody>
</table>

A = Priority, B = Greatest Growth Potential, C = Emerging Source Markets
## STRATEGIC MARKETING PLATFORMS AND PRINCIPLES FOR BUNDABERG NORTH BURNETT

<table>
<thead>
<tr>
<th>Bundaberg North Burnett Positioning</th>
<th>Australia’s premier and most accessible location to experience nesting sea turtles.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bundaberg North Burnett Hero Experiences</td>
<td>The Bundaberg North Burnett hero experiences underpin the Bundaberg North Burnett positioning that provide visitors with world-class experiences and the destination with competitive advantage, are:</td>
</tr>
<tr>
<td>Southern Great Barrier Reef – get up close and personal with the resident turtles and manta rays of the Southern Great Barrier Reef.</td>
<td></td>
</tr>
<tr>
<td>Turtles – witness the cycle of life and one of the true wonders of the natural world as hundreds of sea turtles return to the beach every year to nest and their hatchlings then make the perilous journey back to the sea.</td>
<td></td>
</tr>
<tr>
<td>Regional Flavours – indulge yourself as you enjoy the iconic products of Bundaberg Rum and Ginger Beer and a vast array of other regional produce including citrus, roadside stalls, grapes, mango, honey, blueberry, pecans and prime beef. Visit boutique orchards, farms and cattle saleyards.</td>
<td></td>
</tr>
<tr>
<td>Regional Character – really get to know this special part of Queensland by exploring its coastal gems, lakes, gorges and rural landscapes while getting to know the people who are proud to live here.</td>
<td></td>
</tr>
<tr>
<td>Australia’s Country Way</td>
<td>Australia’s Country Way passes through the North Burnett from Sydney to Rockhampton. The touring route passes through key target markets of regional NSW and Queensland.</td>
</tr>
<tr>
<td>The North Burnett leverages the partnership with Australia’s Country Way to provide the touring consumer an alternative touring experience to the well-trodden coastal tour.</td>
<td></td>
</tr>
<tr>
<td>The North Burnett aims to increase visitation and length of stay by the provision of regional information as part of this established touring route. This marketing partnership also aims to create visitor dispersal throughout the region.</td>
<td></td>
</tr>
<tr>
<td>Southern Great Barrier Reef</td>
<td>The Southern Great Barrier Reef is a priority-marketing platform designed to generate visitation growth. The program will lead product development and allow the Bundaberg North Burnett region to communicate to new markets.</td>
</tr>
<tr>
<td>International Target Markets</td>
<td>Priority countries and segments are:</td>
</tr>
<tr>
<td>Tier 1 (Priority)</td>
<td>Europe and the United Kingdom undertaking long haul touring in Australia</td>
</tr>
<tr>
<td>Working holiday makers travelling to the region for work – from all international markets</td>
<td></td>
</tr>
<tr>
<td>New Zealand young couples of combined VFR/beach holiday</td>
<td></td>
</tr>
<tr>
<td>Tier 2 (Growth)</td>
<td>Singaporean and Malaysian drive market to Southern Queensland</td>
</tr>
<tr>
<td>Chinese FIT market as suitable Southern Great Barrier Reef product grows</td>
<td></td>
</tr>
<tr>
<td>Events and Festivals</td>
<td>The purpose of events in the Bundaberg North Burnett region is to create regional dispersal, profile and economic return within a 400km radius of the event. The greatest beneficiaries of the activities and events being the local communities. Additionally, the destination brand and awareness is also a beneficiary.</td>
</tr>
<tr>
<td>Niche Markets and Travelling for a Purpose</td>
<td>Bundaberg North Burnett region attracts the special interest markets of fishing and diving.</td>
</tr>
<tr>
<td>Travel for a purpose is secured primarily through the attraction of school and sporting groups.</td>
<td></td>
</tr>
<tr>
<td>Meetings/Conferences</td>
<td>Lack of facilities currently limits business generation from the regional meetings market.</td>
</tr>
</tbody>
</table>
TOURISM IN THE BUNDABERG NORTH BURNETT REGION IN 2020

IMPACT AND OPPORTUNITIES PRESENTED BY MEGATRENDS

The Queensland Government, through the CSIRO, has identified seven important trends that will impact tourism over the next 20 years and impact Bundaberg North Burnett region’s ability to achieve the ambitious growth targets of doubling visitor expenditure by 2020.

These trends and how they most significantly impact the Bundaberg North Burnett region are detailed below. These trends are then further reflected in the Priority Strategies and Actions Section.

The Orient Express

- Continuing rapid income growth from eastern marketplaces, inclusive of but not limited to China, will see increased demand for international travel and the potential for repeat visitation
- There is need to understand the demands of Asian markets and determine how both new and old products match the tastes and preferences of the markets. Product suitable to the market such as Lady Musgrave Island day cruises is essential to cater for the needs of the Asian market before the region can fulfill its potential in this area
- As the Eastern hemisphere markets become more knowledgeable and confident in travelling to Australia they will look to explore further afield and a broader range of destinations. The more mature travellers from these marketplaces will also look to travel on a more free and independent (FIT) basis. This will be aided by the loosening of VISA restrictions from China specifically.

The Natural Advantage

- Travel is increasingly being driven by a need to visit natural and pristine environments, especially from city dwellers. Nature must be part of the value proposition for the Bundaberg North Burnett region along with the identification of opportunities to grow and develop nature based experiences
- Nature continues to be Australia’s greatest draw card and will be a key motivator for international visitation. All age groups and nationalities enjoy nature, what changes is how they experience it and the depth of that experience
- The traditional beach holiday will continue to be a staple of Australian’s holiday behaviour particularly for families.

Great Expectations

- Authenticity, connection and personalised experiences will lead the way in motivating people to travel and generate consumer satisfaction. Providing a destination experience that satisfies these requirements is imperative for future growth
- Friends and relatives will continue to be an important motivation for travel and is forecast to rise
- A desire to understand what makes a place tick and the opportunity for social interaction and connection, in the youth travel specifically, will drive opportunities for visitation to a region
- Importance of locals understanding the impacts of tourism and connections with visitors leads to increased visitor satisfaction.

Bolts from the Blue

- The increase of sudden and unexpected events, both natural and politically driven will continue to impact consumer’s propensity to travel from or to a specific destination. Bundaberg North Burnett region has experienced the impact this has on a destination first hand in the 2010/11 and 2013 floods and the length of time it takes to recover.
Digital Whispers
Technology is changing the way people search for holiday information, book holidays, and the amount and type of information they have access to. This use of technology fundamentally changes the business model for destination marketing. Areas that will impact the Bundaberg North Burnett region are:-

- Changes in the way people look for information on holiday destinations and how they access details on experiences that are of specific interest to them. In addition to making consumers fundamentally more knowledgeable on products and destinations
- Changing roles of the travel agent and consumer booking trends and patterns
- Greater information/recommendation sharing (good and bad) between travellers
- Consumers are travelling with a suite of technology allowing real time reports on experiences and the seeking out of information without using local contacts and information sources.

On the Move
- Multi-purpose trips (business/holiday combined) and as such trade and connection leads to visitation and expenditure
- Access and connectivity is vital to visitation, whether by road, rail or air
- Increased mobility of consumers means they are travelling more regularly to more places and there are less barriers to travel
- An increasingly diverse population will see increased international connections resulting in increased visitation of friends and relatives.

The Lucky Country
Australia’s competitive position will be impacted by our place in the global economy. Those elements likely to have an impact on the growth of visitation to the Bundaberg North Burnett region’s tourism include:-

- Price competitiveness of Australia in comparison to other destinations
- The high cost of product delivery in Australia, particularly impacted by wage costs
- Tourism investment in Australia does not offer real short term returns, thus impacting product development and revitalisation, both of which are required in the Bundaberg North Burnett region
- Overseas holidays are getting cheaper and more commoditised and as such are increasingly attractive to the domestic market that provides for approximately 90% of visitation to the region.
IMPACT AND OPPORTUNITIES PRESENTED BY THE QUEENSLAND ECO-TOURISM PLAN

Bundaberg North Burnett region’s position as the gateway to the Southern Great Barrier Reef in addition to the variety of national parks in the region establishes eco-tourism as an imperative element of the holiday experience within the region. Finding the balance between utilising these tourism assets and making them accessible and enjoyable for consumers, while maintaining the natural beauty and ecology of the experience will be an ongoing challenge for the destination.

Opportunities presented by the Queensland Eco-Tourism Plan for the Bundaberg North Burnett region are as follows:-

- Establishing Mon Repos Turtle Rookery as a world class must do visitor experience as the regions key point of difference
- Enabling increased access and interpretation to national parks in the North Burnett
- Facilitating day cruise access to the Southern Great Barrier Reef from Bundaberg by commercial operators.

While there are no specific proposals in place in the plan for the Bundaberg North Burnett region the increased opportunities for commercial businesses to operate in national parks is a positive step for the Bundaberg North Burnett region.

IMPACT AND OPPORTUNITIES PRESENTED BY DRIVE TOURISM STRATEGY

The drive market has been an integral part of the visitor market to Bundaberg North Burnett region and has provided significant visitor expenditure. This is not expected to change as we head towards 2020. Providing visitor experiences that attract this market and encouraging them to stop and stay longer will be pivotal to the achievement of the 2020 targets.

The drive tourism strategy identifies interstate, grey nomads and the international youth market as key elements of the touring market. The strategy also stresses the need to develop product, experiences and information sources to attract this market. In the case of the Bundaberg North Burnett region these product developments that link with the drive tourism strategy are as follows:-

- Development of consumer based experiences in national parks such as walking trails, interpretation, camping facilities and volunteer programs. This is particularly relevant to the North Burnett
- Development of consumer signage and information sources that attract the drive market. There is opportunity to link information services provided by Transport and Main Roads and RACQ to the digital platform being developed by Bundaberg North Burnett Tourism
- Development of drive tourism routes that will aid regional dispersal and development of new product. These could be themed e.g. culinary trails
- Australia’s Country Way and the Rural Getaway are the key drive routes through the North Burnett and TMR is working to replace and revitalise tourism signage along Australia’s Country Way.

SCENARIO FOR GROWTH IN BUNDABERG NORTH BURNETT REGION

A combination of business strategies will need to be utilised to deliver on the aspirational target of doubling visitor expenditure by 2020, in line with the 2020 Tourism Strategy.

The elements of this scenario are as follows:-

1. Increasing demand through the Southern Great Barrier Reef marketing platform and associated improved access to the reef
2. Implementation of product development that exploits regional flavours and the regional character in order to increase length of stay and regional dispersal
3. Increasing international visitation to 20% of total visitor expenditure
4. Development of product that will increase the attractiveness of the Bundaberg North Burnett region to Asian visitors primarily from China, Singapore and Malaysia
5. Continued development of the destination experience and brand to increase market share in established markets
6. Based on the above, development of infrastructure to support the growth of the small meetings market from regional Queensland
VISITOR EXPENDITURE CURRENT ACTUALS AND 2020 TARGET

<table>
<thead>
<tr>
<th></th>
<th>CURRENT SPEND (YE DEC 2013)</th>
<th>2013 STRETCH TARGET</th>
<th>2020 STRETCH TARGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL DOMESTIC</td>
<td>$256.1 million</td>
<td>$286.5 million</td>
<td>$440.6 million</td>
</tr>
<tr>
<td>TOTAL INTERNATIONAL</td>
<td>$32.5 million</td>
<td>$71.6 million</td>
<td>$110.1 million</td>
</tr>
<tr>
<td>TOTAL EXPENDITURE</td>
<td>$288.6 million</td>
<td>$358.1 million</td>
<td>$550.7 million</td>
</tr>
</tbody>
</table>

CONTRIBUTION TO CURRENT VISITATION GROWTH
WHAT ARE BUNDABERG NORTH BURNETT REGION’S TOP OPPORTUNITIES AND CHALLENGES?

Top Opportunities

1. A day cruise to the Southern Great Barrier Reef
   Re-establishment of a regular day cruise to the Southern Great Barrier Reef will provide momentum for growth in the following ways:
   - The tour will be the closest reef cruise day trip to the major centres of Brisbane and the Gold Coast
   - Will allow packaging and market development with the International tourism hub of Fraser Island providing two world heritage experiences within an hour of each other
   - Perfectly complements the nature based experience of the Mon Repos Turtle Rookery and the Lady Elliot Island experience.

2. Digital platform
   As identified by the Megatrends Report, technology is changing the way consumers seek holiday information and secure bookings. Ensuring the destination continues to develop and evolve its digital platform is a key pillar to growth.

3. Product development themed by culinary experiences and ‘Bundaberg North Burnett’ character
   Thanks to several well-known consumer products (Bundaberg Rum, Bundaberg Ginger Beer and Bundaberg Sugar) the name “Bundy” has strong marketplace recognition however this does not resonate as a holiday destination. In addition there is limited product, with the exception of the Bundaberg Rum Bond Store and Bundaberg Brewed Drinks, that provides the consumer the opportunity to experience what the destination is known for. Culinary Tourism includes events, farmers markets, farm gate sales, casual and fine dining. BNBT has a Culinary Tourism Strategy and Action Plan that it is implementing.
   The development of experiences that establish the “Bundaberg North Burnett Character” and exploit the produce within the region will help grow the destination brand.

4. Southern Great Barrier Reef marketing and product development
   Southern Great Barrier Reef marketing platform is integral to the growth of new domestic markets and increasing the international market. The collaboration allows for more significant marketing activity and the development of a new product for the marketplace.
   Product development to support the Southern Great Barrier Reef positioning is also imperative as indicated by the priority put on securing a commercial operator to provide day trip option from Bundaberg.
   Linking fishing experiences into the Southern Great Barrier Reef program will provide strength and greater collaboration across the broader region.

5. Mon Repos and development of a year round turtle experience
   The Mon Repos Turtle Rookery is the largest mainland loggerhead Turtle Rookery in Australia and is internationally significant. This easily accessible nature-based experience attracts all markets and currently operates from November to March. The extension of this facility to operate on a year-round basis will further enhance the reputation of the destination as the best place to view turtles nesting and hatching and work to extend length of stay and repeat visitation.

6. Touring routes and supporting infrastructure
   The development of touring routes and supporting infrastructure, which link the hinterland to the coast and to long haul drive routes will lead to regional dispersal, increased attractiveness to the drive market and boutique drive experiences for those looking for a paddock to plate or nature experience.

7. Development of a multi-purpose centre in Bundaberg
   Bundaberg as the main service centre for the region is ideally placed to secure regional meetings, events and shows. A multi-purpose centre, including 4-star accommodation, will secure events and functions that will service both the community and visitors alike. The development of a multi-purpose facility will also act as the catalyst for the development of accommodation and services that will grow the opportunities to enhance the regional business events market. The multi-purpose centre will cater for sporting groups, large functions and trade shows, concerts and events space.
Top Challenges and Impediments to Achieving Growth

1. **Truly differentiated product that is not found elsewhere and marketplace influence to drive demand**
The Mon Repos Turtle Centre provides a point of difference within the region, however beyond this, the Bundaberg North Burnett region lacks product that is unique. This, combined with limited marketing resources, will continue to impede growth within the region.

2. **Investment attraction**
The destination is heavily reliant on government funding to establish catalyst projects such as development of the Port of Bundaberg, the multi-purpose centre and the Mon Repos Turtle Rookery where an ageing visitor centre is not allowing the world-class attraction to reach its potential of visitation.

Securing commercial and private enterprise investment will be difficult without the development of catalyst projects and increased marketing presence.

3. **Profitability and sustainability**
The majority of tourism businesses within the region are categorised as small enterprises. As such the ability to introduce new individual products to the market and further develop and update products and experiences, is limited.

With increasing costs across the board including wages, insurance and other operating costs are impacting margins and profitability. Low return on investment also limits further investment in the industry and inhibits start-up businesses.

4. **Natural events**
The increase of sudden and unexpected events, both natural and politically driven, will continue to impact on tourists’ propensity to travel from or to a specific destination. Bundaberg North Burnett has experienced the impact this has on destination first hand in the floods in 2010/11 and 2013 and the length of time it takes to recover.

5. **Commanding influence to drive strategic outcomes**
Securing support, funding and co-operation to progress projects of significance will be imperative to the growth of the region. Establishing a position of influence and connectivity with government and other investment arenas will be key to progressing the priorities detailed in this destination tourism plan.

6. **Lack of overarching Events Strategy**
Bundaberg North Burnett hosts a number of community-based events that move visitors from the local area through the region. Largely volunteer-based with limited funding sources the events struggle to move to the next level that will attract visitors to the region from further afield.

While events have the potential to generate visitation, build brand and destination awareness and fill shoulder seasons, development of a whole of region strategy that determines a direction and resourcing, is needed.

7. **Lack of reliable visitor data and expenditure to track and measure impact**
Understanding the visitor market and where opportunity and results lie for the region is imperative. Data for the region currently lacks statistical significance and cannot be segmented to provide a true picture to forecast and plan. This lack of statistical data also impedes the development of business cases and development plans for the region.
WHAT ARE OUR PRIORITY STRATEGIES AND ACTIONS BASED ON THE THEMES OF THE 20 YEAR TOURISM PLAN?

Strategy:
In partnership with TEQ and the Capricorn and Gladstone regions build a strong destination under the Southern Great Barrier Reef brand.

<table>
<thead>
<tr>
<th>ACTION</th>
<th>PURPOSE</th>
<th>PARTNERS AND STAKEHOLDERS</th>
<th>CONTRIBUTION TO VISION</th>
<th>Links to 20 Year Queensland Tourism Strategy</th>
<th>Priority</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work with TEQ and Capricorn and Gladstone regions to maximise co-operative opportunities for BNBT and their members to market under the SGBR brand.</td>
<td>Research has shown that Bundaberg North Burnett’s awareness and preference is higher under the SGBR brand than standing alone under the BNBT brand.</td>
<td>BNBT, TEQ, tourism operators, Capricorn Enterprise &amp; GAPD.</td>
<td>The SGBR is at the heart of the region’s vision.</td>
<td>Strong partnerships, balanced portfolio of markets.</td>
<td>High.</td>
<td>Immediate and ongoing.</td>
</tr>
<tr>
<td>Ensure where appropriate all BNBT marketing is carried out under the Southern Great Barrier Reef brand.</td>
<td>Research has shown that Bundaberg North Burnett’s awareness and preference is higher under the SGBR brand than standing alone under the BNBT brand.</td>
<td>BNBT, TEQ, tourism operators.</td>
<td>The SGBR is at the heart of the region’s vision.</td>
<td>Strong partnerships, balanced portfolio of markets.</td>
<td>High.</td>
<td>Immediate and ongoing.</td>
</tr>
</tbody>
</table>

Strategy:
Strengthen relationships with all levels of government to progress strategic priorities.

<table>
<thead>
<tr>
<th>ACTION</th>
<th>WHY</th>
<th>WHO</th>
<th>CONTRIBUTION TO VISION</th>
<th>Links to 20 Year Queensland Tourism Strategy</th>
<th>Priority</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Encourage local government to support tourism activities and development opportunities.</td>
<td>Many actions will not be possible without government investment, assistance and regulation.</td>
<td>Bundaberg and North Burnett Regional Councils.</td>
<td>Government is an essential partner to deliver the vision.</td>
<td>Strong partnerships.</td>
<td>High.</td>
<td>Immediate and ongoing.</td>
</tr>
<tr>
<td>Identify areas of influence across all three levels of government and work with them to achieve a range of actions across the DTP.</td>
<td>Many actions will not be possible without government investment, assistance and regulation.</td>
<td>Key partners will be TEQ, Bundaberg and North Burnett Regional Councils, Bundaberg Port, DTESB, Tourism Australia, DSDIP, Queensland Parks &amp; Wildlife Service, TMR and QR.</td>
<td>Government is an essential partner to deliver the vision.</td>
<td>Strong partnerships.</td>
<td>High.</td>
<td>Immediate and ongoing.</td>
</tr>
</tbody>
</table>
**Strategy:**
Maintain relevancy of BNBT as the peak regional tourism body with stakeholders and members.

<table>
<thead>
<tr>
<th>ACTION</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Through the board and membership structure interact with the tourism industry communicating the strategies and actions of the DTP, encouraging the industry to include them in their plans and through feedback understand the challenges in obtaining results.</td>
<td>The tourism industry is dominated by small to medium size enterprises. If they are not part of the plan the plan will not succeed.</td>
<td>BNBT.</td>
<td>The industry has to be part of the vision and needs leadership for it to succeed.</td>
<td>Strong partnerships.</td>
<td>High.</td>
<td>Immediate and ongoing.</td>
</tr>
</tbody>
</table>

**Strategy:**
Create a ‘Bundaberg North Burnett’ service culture that reflects the destination experience.

<table>
<thead>
<tr>
<th>ACTION</th>
<th>WHY</th>
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<tr>
<td>Work with local government, education authorities, Chambers of Commerce and operators to raise the quality of customer service in the region.</td>
<td>Without high standards of service the region will not be able to compete and obtain word of mouth recommendations and repeat business.</td>
<td>BNBT, Bundaberg and North Burnett Regional Councils, TAFE, secondary schools, Chambers of Commerce and media.</td>
<td>It will be impossible to be globally recognised without a competitive service standard in the region.</td>
<td>Quality, service and innovation.</td>
<td>High.</td>
<td>2014/15 and ongoing.</td>
</tr>
</tbody>
</table>

**Strategy:**
Develop an improved system for the attraction and employment of the working holiday maker in the region.

<table>
<thead>
<tr>
<th>ACTION</th>
<th>WHY</th>
<th>WHO</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Work with labour agencies, employers and hostels to devise and implement a world class system of employment and accommodation for working holiday makers.</td>
<td>The current system of attracting working holiday makers is not efficient and has the capacity to provide a less than perfect holiday experience for this segment which is the majority of international visitors to the region.</td>
<td>Government employment agencies, employers, grower organisations, hostel operators.</td>
<td>This visitor segment has the capacity to deliver more economic benefit to the region if it is better organised and gives a better visitor experience.</td>
<td>Quality, service and innovation.</td>
<td>High.</td>
<td>2016/17 and ongoing.</td>
</tr>
</tbody>
</table>
### Strategy:
Encourage industry to implement retention strategies for skilled staff that are in line with prevailing employment practices.

<table>
<thead>
<tr>
<th>ACTION</th>
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<td>Quality, service and innovation.</td>
<td>High.</td>
<td>Immediate and ongoing.</td>
</tr>
</tbody>
</table>

### Megatrend – Great Expectations

**Quality, service and innovation.**

**High.**

**Master Plan being developed by QPWS in 2014. Project scope and timelines will be informed by the completed Master Plan.**

### Strategy:
Development and implementation of a Master Plan for the Mon Repos Turtle Centre.

<table>
<thead>
<tr>
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<th>WHO</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Queensland Parks &amp; Wildlife Service to upgrade research, conservation and visitor facilities at Mon Repos with the objective of providing a world class year round visitor facility.</td>
<td>Queensland Parks &amp; Wildlife Service is developing a Master Plan for the continuing development of the Mon Repos Turtle Centre. It is essential that the centre becomes a year-round operation and offers differing visitor experiences.</td>
<td>Queensland Parks &amp; Wildlife Service.</td>
<td>The region’s hero experience has been identified as the Mon Repos turtle experience; it provides the lead for the region’s vision. If the Mon Repos redevelopment does not occur any chance of reaching the 2020 target is minimised.</td>
<td>Investment and access, nature and culture, iconic experiences.</td>
<td>High.</td>
<td>Master Plan being developed by QPWS in 2014. Project scope and timelines will be informed by the completed Master Plan.</td>
</tr>
</tbody>
</table>

### Megatrend – The Natural Advantage

**Investment and access, nature and culture, iconic experiences.**

**High.**

**2014/15 and ongoing.**

### Strategy:
Re-establishment of the Lady Musgrave Island day cruise from Bundaberg cementing linkages with the Southern Great Barrier Reef.

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Encourage an operator to take up the licence available to the Southern Great Barrier Reef for an operation out of Bundaberg.</td>
<td>A feasibility study established that a day cruise from Bundaberg should be viable. The day cruise would open up markets lost to the region when the previous service ceased, in particular, the opportunity to provide product to expand the Chinese and US group tour markets.</td>
<td>NPRSR (QPWS), BNBT, Bundaberg Regional Council, Bundaberg Port, DTESB, DSDIP.</td>
<td>This day trip would add to the Lady Elliot Island existing product, giving visitors a complementary Southern Great Barrier Reef experience.</td>
<td>Investment and access, nature and culture, iconic experiences.</td>
<td>High.</td>
<td>2014/15 and ongoing.</td>
</tr>
</tbody>
</table>

### Megatrend – The Natural Advantage

**Investment and access, nature and culture, iconic experiences.**

**High.**

**2014/15 and ongoing.**
**Strategy:**

Improve the road infrastructure, signage and rest areas along strategic tourism routes. These include the Bruce and Burnett Highways (Australia’s Country Way) and significant regional linkages such as the Monto, Mount Perry and Mingo Crossing Roads and the Rural Getaway.

<table>
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</tr>
</thead>
<tbody>
<tr>
<td>Work with TMR to provide a case for road improvement to tourism-important roads.</td>
<td>The Bundaberg North Burnett region is dependent on the drive market for in excess of 90% of its visitors. A good, safe road network with effective signage is essential for reaching 2020 targets.</td>
<td>TMR, Federal Government, Bundaberg and North Burnett Regional Councils.</td>
<td>A good, safe road network with effective signage is essential for reaching 2020 targets.</td>
<td>Investment and access.</td>
<td>High.</td>
<td>2014/15 and ongoing.</td>
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Development and marketing of themed drive trails and touring routes through the Bundaberg North Burnett region connecting into adjoining regions. | The Bundaberg North Burnett region is dependent on the drive market for in excess of 90% of its visitors. A good, safe road network with effective signage is essential for reaching 2020 targets. | TMR, BNB, Federal Government, Bundaberg and North Burnett Regional Councils. | Megatrend – Great Expectations | Investment and access, balanced portfolio of markets and communication. | High. | 2014/15 and ongoing. |

**Strategy:**

Development of a multi-purpose centre in Bundaberg to cater for regional conferences and significant events.

<table>
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<tr>
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<tbody>
<tr>
<td>Securing funding to build a multi-purpose centre for Bundaberg and complimentary 4-star accommodation.</td>
<td>The centre would cater for regional meetings and conferences and larger events that have been targeted as growth opportunities. Current facilities are inadequate and holding back these sectors.</td>
<td>Bundaberg Regional Council, State and Federal Government, private sector partners.</td>
<td>Events including business events are identified as high yield opportunities to grow tourism in the region particularly in off-peak and shoulder seasons.</td>
<td>Investment and access, balanced portfolio of markets and communication.</td>
<td>High.</td>
<td>2015/16 and ongoing.</td>
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</table>
### Strategy:
Encourage development of product to support hero experiences; regional flavours, regional character, turtles, SGBR.

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<tr>
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<tbody>
<tr>
<td>Develop Paradise Dam Tourist Park.</td>
<td>To add to the product supporting the leisure fishing industry in the region. A feasibility study has identified the opportunity to provide visitor friendly facilities including cabins and powered sites.</td>
<td>North Burnett Regional Council, Sunwater, private enterprise.</td>
<td>Identified opportunity to cater for visitors and to increase yield at Paradise Dam.</td>
<td>Iconic experiences, investment and access.</td>
<td>High</td>
<td>2016/17 and ongoing.</td>
</tr>
<tr>
<td>Development of stage two of the R M Williams Australian Bush Learning Centre at Eidsvold.</td>
<td>The development of the Centre was held back due to a reduction in grant funding available to build the project. To improve viability and to attract more visitors the Centre needs stage two to be completed.</td>
<td>North Burnett Regional Council, State and Federal Governments and other funding bodies.</td>
<td>RM Williams was one of Australia’s great bush characters and the centre is designed to honour his contribution and to attract visitors to stop in the North Burnett.</td>
<td>Iconic experiences, investment and access.</td>
<td>Medium</td>
<td>2016/17 and ongoing.</td>
</tr>
<tr>
<td>Encourage development of a coastal nature drive trail from Rainbow Beach to 1770.</td>
<td>To attract the drive market off the Bruce Highway initially using existing roads to distribute visitors through the region.</td>
<td>Gympie, Fraser Coast, Bundaberg and Gladstone Regional Councils; TMR, Sunshine Coast, Fraser Coast, BNBT and Gladstone RTOs.</td>
<td>Open up an alternative themed route to the Southern Great Barrier Reef. Cluster nature based activities.</td>
<td>Megatrend – The Natural Advantage</td>
<td>Medium</td>
<td>2016/17 and ongoing.</td>
</tr>
<tr>
<td>Continue development of product to support culinary tourism in the Bundaberg North Burnett region. This includes supporting the redevelopment of the Bundaberg Rum Bondstore.</td>
<td>The region is one of Australia’s iconic food bowls and there is demonstrated demand from consumers to visit, taste and buy local produce.</td>
<td>BNBT, Bundaberg and North Burnett Regional Councils, TEQ, DSDIP, grower groups, operators.</td>
<td>Leverage the considerable consumer interest in food and wine; this also has linkages to trade particularly with Asian markets. Megatrend – Great Expectations</td>
<td>Iconic experiences.</td>
<td>High</td>
<td>2014/15 and ongoing.</td>
</tr>
<tr>
<td>Encourage the development of fishing product including competitions.</td>
<td>Fishing is Australia’s most participatory sport. The region has a natural advantage in leisure fishing with the Burnett River having the most dams of any in Australia. The combination of re-stockable inland impoundments with estuarine, coastal and offshore fishing is a strong competitive advantage.</td>
<td>BNBT, fishing clubs, fishing competition organisers, private enterprise operators.</td>
<td>Fishing provides a year round sustainable leisure activity to attract a wide market; it also has the capacity to draw a large number of visitors through events.</td>
<td>Iconic experiences.</td>
<td>Medium</td>
<td>2013/14 and ongoing.</td>
</tr>
<tr>
<td>Implementation of the Bundaberg Port Master Plan.</td>
<td>To provide additional accommodation, marina berths and facilities for visitors to the Southern Great Barrier Reef.</td>
<td>Gladstone Port Authority as owners of the Bundaberg Port, private enterprise.</td>
<td>The Bundaberg Port provides a base for exploration of the Southern Great Barrier Reef, a key driver for the region.</td>
<td>Investment and access, iconic experiences, strong partnerships.</td>
<td>High</td>
<td>2014/15 and ongoing.</td>
</tr>
<tr>
<td>Develop the Bundaberg Botanic Gardens into a heritage precinct to build on existing product in the site</td>
<td>Reflect the destination heritage and development in a single precinct and provide a full day experience within the park.</td>
<td>Bundaberg Regional Council.</td>
<td>Extends length of stay through the provision of additional attractions within the region.</td>
<td>Iconic experiences.</td>
<td>Medium</td>
<td>2014/15 and ongoing.</td>
</tr>
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The development of the Bundaberg Port is a significant opportunity to enhance the region's tourism potential. The Port provides a base for exploration of the Southern Great Barrier Reef, a key driver for the region. The project aims to attract more visitors through a full day experience within the park, leveraging the combination of re-stockable inland impoundments with estuarine, coastal and offshore fishing, which offers a strong competitive advantage. The Bundaberg Port Authority, as owners of the Bundaberg Port, is responsible for the development. The project is designed to honour R M Williams, a great bush character, and attract visitors to stop in the North Burnett region. The product development is expected to create additional tourism value, including culinary tourism and fishing opportunities. The project will contribute to the region's natural advantage and leverage existing infrastructure, such as the Bundaberg Botanic Gardens, to create a cohesive tourism product.
**Strategy:**
The Bundaberg and North Burnett Regional Councils to develop Events Strategies and through that process identify hero tourism events to generate off-peak visitation and reflect the destination experience.

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<tr>
<td>Encourage regional councils to develop Events Strategies and work with event organisers to maximise the tourism potential of events.</td>
<td>Events have the capacity to drive additional visitation and in particular fill shoulder and off-season periods. There are excellent sporting facilities in the region, e.g. Bundaberg Recreational Precinct.</td>
<td>Bundaberg and North Burnett Regional Councils, BNBT, event organisers, TEQ,</td>
<td>To achieve our targets we will need to fill the whole year not just increase the peaks, events have the capacity to achieve this with a good yield.</td>
<td>Iconic experiences, strong partnerships, balanced portfolio of markets and communication.</td>
<td>High.</td>
<td>2014/15.</td>
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**Strategy:**
Development of walking trails, interpretation and access to National Parks in the North Burnett.

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<tr>
<td>Further develop walking trails, access and interpretation of indigenous experiences in National Parks.</td>
<td>Nature and culture are key drivers of visitation.</td>
<td>Queensland Parks &amp; Wildlife Service and North Burnett Regional Council.</td>
<td>The vision is nature based and this strategy provides support in the hinterland and country areas.</td>
<td>Nature and culture, access and investment.</td>
<td>Medium.</td>
<td>2014/15 and ongoing.</td>
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**Strategy:**
Develop a leading edge digital communication system to provide information to consumers during the holiday planning stage and while in the region.

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<tr>
<td>Roll out and grow the Bundaberg North Burnett digital tourism information platform comprising social media, web, mobile web, app and touch screen elements with an integrated booking system.</td>
<td>The continuing growth of digital communication makes it essential for the region to be involved in this medium.</td>
<td>BNBT, TEQ, ATDW, Bundaberg and North Burnett Regional Councils, event organisers and operators.</td>
<td>The ongoing digital revolution in information provision means that the region needs to be at the forefront of the medium to connect with our visitors.</td>
<td>Balanced portfolio of markets and communication.</td>
<td>High.</td>
<td>2013/14 and ongoing.</td>
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</table>
**Strategy:**
Grow International markets to 20% of total visitation, in particular Asian visitors once relevant product is established.

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<th>Timeframe</th>
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<tr>
<td>Continue to encourage, support and educate tourism operators to develop their international markets.</td>
<td>According to the Tourism Forecasting Council and the CSIRO Megatrends document, international tourism in particular from the Asian region will give Queensland its biggest percentage growth in visitation and the region needs to be prepared to increase their share of this market.</td>
<td>BNBT, TEQ, Tourism Australia, tourism operators.</td>
<td>Capturing an increasing percentage of the inbound market is essential to the region reaching its 2020 targets.</td>
<td>Balanced portfolio of markets and communication.</td>
<td>High.</td>
<td>2013/14 and ongoing.</td>
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**Strategy:**
Target markets that travel for a purpose.

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<tr>
<td>Develop and implement a recreational fishing plan</td>
<td>Fishing is an identified activity that has linkages to the Southern Great Barrier Reef and is the largest participatory sport in Australia.</td>
<td>BNBT, Fishing clubs, accommodation and fishing operators.</td>
<td>Linkage to the Southern Great Barrier Reef extending the visitor experience.</td>
<td>Balanced portfolio of markets and communication.</td>
<td>Medium.</td>
<td>2015/16 and ongoing.</td>
</tr>
<tr>
<td>Increase the number of sporting groups visiting the region for matches/events.</td>
<td>There is potential to attract more sporting groups to use the region’s excellent sporting facilities.</td>
<td>Sporting organisations, Bundaberg and North Burnett Regional Councils, BNBT.</td>
<td></td>
<td>Balanced portfolio of markets and communication.</td>
<td>Medium.</td>
<td>2014/15 and ongoing.</td>
</tr>
<tr>
<td>Develop and implement a plan to increase the regional meetings market.</td>
<td>The development of a new facility in Bundaberg has the potential for this centrally located regional centre to attract more meetings.</td>
<td>BNBT, Bundaberg and North Burnett Regional Councils, operator of the planned Bundaberg multi-purpose centre, accommodation operators.</td>
<td></td>
<td>Balanced portfolio of markets and communication.</td>
<td></td>
<td>2015/16 and ongoing.</td>
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APPENDIX

CONSULTATION
Consultation has been undertaken on 3 levels.

STAGE 1
The Bundaberg Tourism Summit was held in August 2013. The objective of the Summit was to bring the community of the Bundaberg North Burnett regions together to identify and prioritise opportunities for growing tourism in the region. This bottom up approach brought a broad cross-section of stakeholders together, to play an important role in growing their own tourism future.

The Tourism Summit Report was a constant reference in the next stages of consultation.

Key Outcomes

Marketing:
1. Focus on building local community and operator knowledge to make them tourism ambassadors
2. Develop positioning that captures the elements of the region as provided by the discussion groups...not just a tagline
3. Continue to focus on key areas of the drive market, grey nomads and backpackers – put focus on developing new customer targets
4. Should we focus on delivering the message with word of mouth being the key channel?

Festivals & Events:
1. Coordination and planning for all events across the Bundaberg and North Burnett region
2. Turtle Festival – opening and closing of the season, focusing on environment, natural beauty and assets of the region
3. Outdoor sporting events – cycling, triathlon, mountain bikes (potential use of rail trails)
4. Music Festival – commercial opportunity incorporating local venues

Products & Experiences:
1. Turtle Interpretive Centre – to be a year round attraction
2. Agri-tourism experiences including premium Farmer’s Market (what location?), farm tours etc
3. Fast access to the reef (day trip)
4. 4-star Conference Centre/Hotel/Attraction

Summit Registered Attendees

<table>
<thead>
<tr>
<th>Attendee</th>
<th>Jennifer Bebbington</th>
<th>Amber Rodgers</th>
<th>David Wise</th>
<th>Roy Sutherland-Fraser</th>
<th>Jacky Poulter</th>
</tr>
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<tbody>
<tr>
<td>Garry Cooper</td>
<td>John McDonald</td>
<td>Neil Mergard</td>
<td>Trish Mears</td>
<td>Vanessa Kummerow</td>
<td>Brian Reynolds</td>
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<tr>
<td>Cameron Bisley</td>
<td>Helen Brett</td>
<td>Katrina Carey</td>
<td>Lester Lewis</td>
<td>Michael Owens</td>
<td>Peter Macsween</td>
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<tr>
<td>Liz McNeill</td>
<td>Edith Buckland</td>
<td>David Andrew</td>
<td>Amanda Filmer</td>
<td>Peter Peterson</td>
<td>Di Willis</td>
</tr>
<tr>
<td>Cr Judy Peters</td>
<td>Sue Evans</td>
<td>Jan Sullivan</td>
<td>Tracey Davies</td>
<td>Margaret Doughty</td>
<td>David Finnis</td>
</tr>
<tr>
<td>Tomas O’Malley</td>
<td>Cr Ross Sommerfeld</td>
<td>John Lawrence</td>
<td>Perry Bacon</td>
<td>Felicity Liciardo</td>
<td>Barry Ehke</td>
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<tr>
<td>Marianne Lethbridge</td>
<td>Valerie Brown</td>
<td>Maureen Lawrence</td>
<td>Anthony Mammino</td>
<td>Nene McKinlay</td>
<td>Vince Urquhart</td>
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<tr>
<td>Wendy Francis</td>
<td>Roz Irwin</td>
<td>Glenn Stevenson</td>
<td>Maegan Shuttleworth</td>
<td>Louise Urquhart</td>
<td>Lionel Rasmussen</td>
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<td>Rahima Hayes</td>
<td>Gavin Hales</td>
<td>Wayne Richards</td>
<td>Elaine Horne</td>
<td>Mary Byrne</td>
<td>Paul Massingham</td>
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<tr>
<td>Phill Sellwood</td>
<td>Peter Hockings</td>
<td>Rodger Gittoes</td>
<td>Cr Jo Dowling</td>
<td>Terrance Byrne</td>
<td>Cr Danny Rowleson</td>
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<tr>
<td>Geoff Beyer</td>
<td>Leanne Donaldson</td>
<td>Lisa Wain</td>
<td>Sherrie Breitkopf</td>
<td>David Cornwell</td>
<td>Rhonda Rowleson</td>
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<tr>
<td>Clint Jensen</td>
<td>Ron Dodds</td>
<td>Denise Short</td>
<td>Ainsley Gatley</td>
<td>Donna Wall</td>
<td>Beth Scott</td>
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<tr>
<td>David Southgate</td>
<td>Maureen Stevens</td>
<td>Kerry Short</td>
<td>Mal Brown</td>
<td>Mark Leskovar</td>
<td>Rob Messenger</td>
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<tr>
<td>John Danahay</td>
<td>Darrell Stevens</td>
<td>Hans Jakobi</td>
<td>Loni Hammond</td>
<td>Rhonda Kay</td>
<td>Fern Messenger</td>
</tr>
<tr>
<td>Mary Danahay</td>
<td>Grahame Watt</td>
<td>Colette Jakobi</td>
<td>Brent Roberts</td>
<td>Phillip Kay</td>
<td>Heather Simpson</td>
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<tr>
<td>Cr Paul Lobegeier</td>
<td>Robert Bromwich</td>
<td>Damian Kelly</td>
<td>Tim Sayre</td>
<td>Mark Perks</td>
<td>Ian Smith</td>
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<tr>
<td>Megan Buckley</td>
<td>Kay Tuck</td>
<td>Kevin Jensen</td>
<td>Ken Graham</td>
<td>Heather Robson</td>
<td>Bob Materna</td>
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<tr>
<td>Cr Vince Habermann</td>
<td>Sherree Horgen</td>
<td>Nina Higgins</td>
<td>Cr David Batt</td>
<td>Cr Lynne Forgan</td>
<td>Rowena Radel</td>
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<tr>
<td>Michael McRae</td>
<td>Sharon Grosset</td>
<td>Trevor Versace</td>
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STAGE 2
A steering committee of prominent and engaged stakeholders was established to guide the development of the Destination Tourism Plan. Over a series of five meetings the group discussed and debated the opportunities and challenges facing the region in achieving the aspirational visitor expenditure goal set from the 2020 plan. An independent Chairman chaired the Steering Committee.

The Steering Committee
- Chairman - Phillip Clift – Head of Campus, Central Queensland University, Bundaberg
- Andrew Jackson, Director, Community and Cultural Services, North Burnett Regional Council
- Jaci Megaw, Tourism Development Manager, North Burnett Regional Council
- Cameron Bisley, Branch Manager, Commercial Business & Economic Development, Bundaberg Regional Council
- Liz McNeill, Tourism Development Coordinator, Bundaberg Regional Council
- Anthony Mammino, Chairman Bundaberg North Burnett Tourism – Food Tourism
- Michael Owens, Deputy Chairman, Bundaberg North Burnett Tourism - Investment and Developer
- Loni Hammond, Board Director, Bundaberg North Burnett Tourism – Accommodation Sector
- Jason Pascoe, Company Secretary, Bundaberg North Burnett Tourism Board – Manager Port of Bundaberg
- Garry Cooper, Principal Economic Development Officer, Department of State Development, Infrastructure and Planning
- Karen Ronning, Destination Director, Southern Great Barrier Reef Region, Tourism & Events Queensland
- Katherine Mergard, Marketing Manager, Bundaberg North Burnett Tourism
- Rick Matkowski, General Manager, Bundaberg North Burnett Tourism

STAGE 3
Individual meetings were undertaken with a variety of interested parties to both engage and canvass how they can play a role in developing tourism within the region and also to talk through the process.

Meetings were held with the following stakeholders:-

Adam Williams, Manager Corridor Management and Operations, Department of Transport and Main Roads
Kerry Short, Event Organiser, Cane2Coral Fun Run
Shelley Pisani, Creative Producer, Creative Regions Bundaberg
Duncan Littler, Bundaberg Distilling Company
Ainsley Gatley, Event Networkx
Liz Robertson, MMTAG
Lyn Tucker, MMTAG Chair
Peter Anderson, RM Williams Centre
Laurel Bayles, RM Williams Centre
Cr Don Waugh, Mayor, NBRC
Cr Paul Lobegner, NBRC and Director BNBT
Cr Lofty Wendt, NBRC
Cr Paul Francis, NBRC
Cr Jo Dowling, NBRC and Observer Director BNBT
Cr John Bowen, NBRC
Andrew Jackson, NBRC
Sherrie Breitkopf, Three Rivers Caravan Park and Director BNBT
Jim Cunliffe, Biggenden Chamber of Commerce and Owner of Biggenden Motel
Dianne Wilson, Eidsvold on the Corner Café & Motel
Ramona, Mundubbera Motel
Eidsvold Historical Society – Jan, Richard, John
Deb Dingle, Marchioness B & B, Mt Perry
Jennifer Parry, Mt Perry

REFERENCE MATERIAL
- Bundaberg Region, Facts and Figures, September 2013
- Bundaberg North Burnett Region, Destination Tourism Strategy, 2012-2016
- Queensland Ecotourism Plan 2013-2020
- Southern Great Barrier Reef Brand Health Check, Tourism and Events Queensland, 2013
- Wide Bay Burnett Draft Economic Development Strategy
- TEQ, Bundaberg Social Indicators 2013
- Bundaberg North Burnett, Tourism Summit Outcomes, 2013
- Queensland Tourism – Industry Outlook and Potential to 2020, Department of Tourism, Major Events, Small Business and Commonwealth Games, August 2012 (prepared by Deloitte Access Economics)
- North Burnett Tourism Strategy, 2012-2016
- Department of National Parks, Recreation, Sport & Racing
- The Future of Tourism in Queensland, Megatrends creating opportunities and challenges over the coming 20 years, CSIRO, 2013
- Bundaberg-Fraser Coast Tourism Opportunity Plan, 2009-2019
- 2020 Strategic Marketing Plan, Tourism and Events Queensland, 2012
- Bundaberg Tourism Profile, Dec 2009-Dec 2012
- North Burnett Tourism Profile, Dec 2009-Dec 2012
- Port of Bundaberg Master Plan 2013
- Bundaberg North Burnett Tourism Business Plan 2013
- Southern Great Barrier Reef Brand Health Report, October 2013
- Gateway Visitor Centre, Draft Master Plan for Consultation, Discussion Paper 2013
- Bundaberg Regional Council Economic Profile