Executive Summary

Tourism and events in the Gladstone region contribute $670.2 million of direct and indirect expenditure to the local economy and support an estimated 6,222 jobs (year ending June 2013).

Tourism is an important sector in the economic mix of the Gladstone region alongside its manufacturing, construction, agribusiness and service industries and the fledgling world class energy resources industry. Sub-regionally, outside of the industrial and business hub of the city of Gladstone, tourism is a key industry on the Discovery Coast in the towns of Agnes Waters and the Town of 1770 to the south.

To help achieve Central Queensland’s 2020 target aspiration of $1.16 billion in overnight expenditure, the region will have to contribute approximately $371 million (32% of the Central Queensland 2020 target). In order to do this, a planned approach is required to harness key market segments to drive growth in the region.

Recognising this, the following Gladstone region Destination Tourism Plan has been prepared to provide the definitive direction for tourism and events in the region towards 2020, highlighting the key projects, enabling actions and partnerships required to achieve the 2020 target and create a sustainable and competitive tourism and events destination.

About the Destination

More than just the gateway to the Southern Great Barrier Reef and Capricorn Bunker group of Islands, the Gladstone region supersedes stereotypes.

The City of Gladstone with the Port of Gladstone is better known as one of Australia’s major industrial and business centres playing home to many industrial and liquefied natural gas giants. Alongside these key industries, the Gladstone region has also become a popular destination for holiday makers and sea changers alike.

The booming regional economy is underpinned by a healthy mix of manufacturing, mining, mineral resources and energy industries. This economic stability, coupled with the idyllic natural surrounds of the Southern Great Barrier Reef, proximity to National Parks and the laid back coastal and rural hinterland lifestyles on offer in the region makes for the ideal destination for both visitors and life-style change agents.

Key Markets

Tier One
- Connectors in Regional Queensland and Brisbane (400km radius of Gladstone region.)

Tier Two
- Connectors in Sydney and Melbourne
- New Zealand, United Kingdom and North America, promoted as Southern Great Barrier Reef.

Tier Three
- Social Fun-seekers
- Europe, promoted as Southern Great Barrier Reef.

New and Developing
- China, promoted as Southern Great Barrier Reef.

Opportunities for Growth

To grow and prosper as a destination and to achieve its $371M aspiration for 2020 (an extra $124M), it is recommended that the following markets (Figure A) be considered as key target areas for growth of Gladstone Region’s visitor economy:

- VFR;
- Business (including conferences/exhibitions);
- Niche (nature/adventure and fishing); and
- Events.

1 Gladstone’s 2020 target aspiration towards the Central Queensland 2020 target has been set based on its proportion of visitor nights compared to Capricorn for the Central Queensland region.
Towards 2020

Our Vision

The 2020 Destination Vision for Gladstone Region is to:

**Develop its leisure and business experiences to their full potential to enhance the liveability and tourism appeal of the destination.**

- For Gladstone this means fully developing the potential of the city as a business hub and establishing it as a new conference, events and meetings destination. Developing a broader range of accessible and compelling leisure experiences alongside the business and conferencing offer is fundamental to delivering overall industry potential.

- For the Discovery Coast, this means building recognition and appeal as a holiday destination. Increased visitor numbers and lengths of stay will be unlocked via encouraging new and enhanced reef, island and activity experiences, alongside investment in essential tourism precinct and access improvements. Developing its positioning as a centre for health and well-being provides an opportunity to complement the area’s appeal as a destination to enjoy Queensland’s laid back and un-crowded beach lifestyle.

Our Goals

- Grow the Region’s share of Queensland’s conferences and exhibitions market to 3.5%, and increase the average length of stay of business visitors by a quarter of a day by linking business trips to easily accessible leisure experiences and events.

- Grow VFR market share by 5% per annum, and support growth. Growing awareness of the opportunities ‘in our own backyard’ and unlocking the potential of a growing population base will require raising awareness of leisure opportunities among the resident population, and developing leisure options which generate visitor expenditure.

- Attract new niche visitors coming for nature and adventure experiences, seeking 2% per annum growth in Gladstone Region’s market share (for the whole of Queensland). Pre-requisites for achieving the growth are a mix of new and enhanced product development and enhanced National Park and marine/diving/islands experiences, whilst also profile/ awareness raising in target markets via a major marketing campaign under the Southern GBR banner.

- Attract new niche fishing visitors, increasing market share by 1% per annum. Growth will be driven by targeted infrastructure investment and social-media driven marketing.
• Grow events expenditure by extending the average length of stay of events visitors by 0.5 days - developing the appeal, packaging and sustainability of existing events, and developing new events which fill identified gaps in the Region’s events calendar.

• Support new product investment to develop the potential of the Region’s islands and reefs including Heron Island, Lady Musgrave Island and the Capricorn Bunker Group, and develop additional opportunities to access SGBR reefs and islands as catalysts to new product investments.

• Establish a new drive route/ itinerary within the Gladstone region supported by appropriate signposting and marketing collateral/activity which incorporates key Gladstone and Discovery Coast destinations in addition to linking with key attractors in neighbouring RTO areas where appropriate, adding to the overall strength of the proposition.

• Establish effective and practical working partnerships within the industry and with public sector agency partners as a key enabler to unlocking growth potential.

Destination Priorities

The following priority strategies have been identified:

Catalyst Projects

1. Firmly establish the Gladstone Region as part of the Southern Great Barrier Reef as a destination for easy enjoyment of reef, beach, bush and adventure experiences.

2. Reinvigorate the Gladstone Region’s fishing product.

3. Establish a drive strategy which builds the case for better signage, road upgrades, development of touring routes in the SGBR and maps in the Gladstone Region.

4. Establish the Gladstone Region as a key strategic port for Queensland for the Cruise Industry.

5. Embrace a strategic approach to marketing of the Gladstone Region to maximise investment.

6. Establish the Gladstone Region as a recognised destination in the M.I.C.E market incorporating a strong events program.

Enablers of Success

Partnership

• Reinvigorate tourism in the region through leadership and partnership working arrangements: GAPDL has formed a new Destination Tourism Development Group (DTDG) in October 2014 to act as the key co-ordination point for the Region’s tourism industry. Owning delivery and monitoring of the destination tourism plan and guiding communication to develop and plan clear roles for regional and local partners. The DTDG has obtained a formal relationship with the GAPDL Board, providing the opportunity to forge deeper links between tourism and other sectors of the economy.

• Strengthen local and regional partnerships in tourism and economic development including the SGBR partnership.

• Work with QPWS to prioritise investment in parks’ infrastructure to maximise ecotourism growth, where consistent with management and infrastructure plans.

• Build the case for roads and access investment, in particular;
  - Seeking support for implementing priority signposting improvements; and
  - Flood-proofing of key intra-region access routes.

Access

• Maintaining and developing Gladstone Airport’s route and service network – ensuring that good air access remains a competitive advantage for the Region.

Voice for Tourism

• Undertake co-ordinated and evidence-based lobbying to ensure that regulatory frameworks are proactive in identifying tourism opportunities, and create an investor friendly environment, including; tourism-oriented planning schemes, and key marine, fishing and parks regulations.
• Build community appreciation and support for tourism and future investment via co-ordinated communication - identifying tourism as a key pillar of the economy and contributor to liveability/quality of life.

Capacity Building

Work with QTIC, TEQ and industry partners to boost business capacity in terms of;

• Mentoring, networking and support for businesses focusing on experience development, market awareness, and international-readiness.
• Support for local event organisers to build professionalism and sustainability.
• Continuing to implement a service quality program to drive profitability and build civic pride such as the Cruise Welcome Program.
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Acknowledgements
This document has been prepared with the assistance of and on behalf of Gladstone Area Promotion and Development Limited (GAPDL) and Tourism and Events Queensland. Images used throughout this document are courtesy of Tourism and Events Queensland and Gladstone Area Promotion and Development Limited.

Disclaimer
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SETTING THE SCENE
The Gladstone Region is well placed to work towards the 2020 target of doubling overnight visitor expenditure set by the Queensland Government given the right support.

This won’t be achieved through growth in the leisure market alone, it will be possible through the broader definition of the visitor economy which includes visiting friends and relatives, business visitors, event visitors (including sporting) and those who travel for a specific purpose (e.g. health, education).

Tourism is already worth approximately $247M in direct overnight expenditure (based on the assumption that the region’s 32% share of visitor nights to Central Queensland also reflects the same proportion of expenditure) which directly supports over 4,056 jobs. The aim is to stretch the value of the overnight visitor economy to $370.7M by 2020.

The Gladstone region believes they can, with the right level of support, meet and possibly exceed this target by growing the broader visitor economy.

Figure 1: Current and Stretch Target Expenditure by Market Segment
What is a Destination Tourism Plan?

Destination Tourism Planning is the next evolution of destination management. With the emphasis and decision-making moving to the destination, a clear direction for tourism and events in that destination needs to be articulated to its stakeholders. A Destination Tourism Plan (DTP) draws on the existing reports and resources already prepared at a local, regional, state and national level.

The aim of the DTP is to provide the definitive direction for tourism and events in a destination towards 2020, highlighting the resources required to create a sustainable and competitive tourism destination. A key feature of the DTP is that it is directly linked to the State (and National) targets to double the value of tourism, while recognising the local challenges and opportunities of the destination’s unique tourism assets, unique development, marketing and management needs. Based on available research, consultation and stakeholder feedback, and a review of existing planning, reviews and reports, the Destination Tourism Plan builds on grass roots level support for key initiatives from local tourism organisations, tourism boards, local government, and operators.

Objectives of a Destination Tourism Plan

- Address the needs of the broader visitor economy in the Gladstone Region.
- Act as a reference point for the Region when providing inputs to State and Federal policy and legislation formulation which will impact on the Region’s hard and soft tourism infrastructure.
- Complement existing Regional strategies, including Gladstone Regional Council’s Corporate and Community Plans and the Gladstone Region Economic Development Strategy.
- Implement a best practice destination tourism plan to attract visitors to the Gladstone Region, distribute economic benefits to the destination and support a sustainable tourism industry.
- Recognise and build on the unique features of Gladstone region.
- Outline the value of tourism and events to the wider regional economy in terms of expenditure, jobs and industries supported by tourism and events.
- Identify unique tourism experiences, product and event development opportunities and associated key infrastructure needs required to meet the needs of consumers.
- Provide a clear tourism and events marketing strategy and direction for the Gladstone region.

The difference is made by matching the unique assets and people in the tourism and events network to emerging trends and opportunities and by prioritising our efforts.
Why Prepare a Destination Tourism Plan?

Tourism is recognised as one of the four pillars of the Queensland economy and a significant contributor to employment and the future economic prosperity of the State. The Queensland Government, through the inaugural DestinationQ forum in 2012, acknowledged the fundamental role of the destinations in returning Queensland to its rightful place as Australia’s pre-eminent tourism destination. Each destination has its own unique experiences, opportunities and challenges and therefore each needs to set its own clear direction. That is the role of a Destination Tourism Plan (DTP).

There are many reasons for a destination to be proactive in setting and articulating its direction and key priorities towards 2020 through a DTP, these include:

Meeting the future needs of visitors
Not only are visitor expectations constantly rising, but forecasts for Australia and Queensland suggest a significant shift in the markets that each destination will have to cater for. Almost half of the forecast growth for Queensland will come from key international markets including both traditional markets (Japan and New Zealand) and emerging markets such as India and China. In addition to their origin, destinations need to respond to changing visitor needs as they become more active, adventurous, and engaged as well as shifting travel planning and booking needs.

Engaging local, regional, state and national partners
Tourism is everyone’s business. Working in isolation, the traditional tourism industry cannot achieve the vision. The aim of the DTP is to gain local, regional, state and national support for Gladstone region’s priorities based on firm understanding of its opportunities and challenges.

Demonstrate the destination’s contribution to the State and National Target – Double overnight visitor expenditure by 2020
Embracing the national direction, Queensland has set an ambitious target of doubling overnight visitor expenditure to $30 billion by 2020. Each destination has a significant role to play in achieving this target, how that will be achieved is a clear outcome of the DTP process.

Balancing future tourism and events growth with local aspirations
Reaching, or exceeding, the target will have an impact on how the local community feels about tourism and events in their community. The future plans for tourism and events in the Region need to align to, and contribute to, the community’s aspirations and that of the organisations that represent their interests including local government, economic development organisations, chambers of commerce, industry associations, community conservations groups and others.

To get the full support of its partners – Gladstone region as a destination has to articulate where it is going, why and how. That is the role of a DTP.
The Role and Economic Contribution of Tourism and Events

Tourism and events are part of the broader visitor economy which this DTP aims to grow. The visitor economy includes all leisure travel, and travel associated with business, events, visiting friends and relatives, and for the purpose of health and education.

Based on best estimates from the National and International Visitor Surveys, the visitor economy injects $247 million of overnight visitor expenditure into the Gladstone region’s economy. This in turn generates an estimated overall expenditure impact of $670.2 million (direct and indirect expenditure) across sectors which include transport, accommodation and food services and retail trade.

In the Gladstone region, direct and indirect overnight expenditure supports an estimated 6,222 jobs (based on June 2013 IVS and NVS data, and Deloitte Access Economics estimates in the Tourism Satellite Accounts 2010/11) and for every $60,863 of visitor spend in Queensland, one full time employee (FTE) is created or supported.

An increase in visitation and subsequent visitor spend will have a direct positive impact on many sectors and their contribution to local and regional employment figures.

Performance for overnight visitor markets in the wider region has been quite volatile over the past five year period, with domestic visitor numbers falling by an average of 1% per year. However, domestic average length of stay has increased by 3% year on year leading to average annual rises in expenditure of 4%.

Achieving the target 2020 growth represents a challenging objective, but with continued focus, partners are confident of working towards this goal.

Figure 2 on the over page shows the overall impact of overnight visitor spending in Gladstone region’s visitor economy.

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2 Based on estimates by Deloitte Access Economics for the Central Queensland Region.
Figure 2: Visitor Benefits to the Gladstone Region Economy

Source: EC3 Global from the Tourism Satellite Account by Deloitte Access Economics

*Based on Access Economics estimates in the Tourism Satellite Accounts and for every $60,863 of visitor spend in Queensland, one full time employee (FTE) is created or supported

Gladstone Region
Total Expenditure Impact: $670.2 million / Tourism FTEs 6,222*

Other Industries
$273.3M
Supporting 959 FTEs

Accom. & Food Services
$127.2M
Supporting 2,033 FTEs

Transport Services
$126.9M
Supporting 1,359 FTEs

Travel & Tour Operators
$39.7M
Supporting 299 FTEs

Retail Trade
$55.6M
Supporting 766 FTEs

Arts & Recreation
$17.1M
Supporting 257 FTEs

Education & Training
$30.4M
Supporting 469 FTEs

Transport Services
$126.9M
Supporting 1,359 FTEs

Travel & Tour Operators
$39.7M
Supporting 299 FTEs

Retail Trade
$55.6M
Supporting 766 FTEs

Arts & Recreation
$17.1M
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Education & Training
$30.4M
Supporting 469 FTEs

Gladstone Region
Total Expenditure Impact: $670.2 million / Tourism FTEs 6,222*
Perceptions of Tourism and Events in Gladstone Region

Visitor Perceptions

Tourism and Events Queensland’s Brand Equity Index (BEI) provides a means of measuring the consumer perceptions of the State’s visitor destinations.

The BEI tool quantifies consumers’ attitudes giving them a score out of ten (where 0 is low and 4 is considered high). For Queensland destinations, the majority (50%) of BEI scores are under 1.0, 35% of BEI scores are between 1.0 and 3.0, 15% are over 3.0. When BEI is between 1.0 and 3.0 the destination has meaning to a number of customers who are likely to consider visiting and may visit. For scores of less than 1.0, although some meaning may have been established, a limited number of consumers currently know or use the brand.

Figure 3: Brand Health Index 2010-2012

Gladstone Region

Amongst Queensland residents the BEI scores for all destinations in the Southern Great Barrier Reef region (Gladstone region, Capricorn and Bundaberg) range between 0.4 and 0.5 on the scoring index.

In comparison with other Queensland tourism regions, Gladstone region currently ranks towards the lower end of the BEI scoring spectrum which is topped by Sunshine Coast (2.3), Gold Coast (2.0) and Whitsundays (1.9).

There has been a small decline in the proportion of Queenslanders that would consider holidaying in the region since 2010, reflecting the trend at a state level and is due to consumer confidence softening and the general trend of domestic holidays.

Southern Great Barrier Reef (SGBR)

2013 is the first year that a brand health check has been carried out for SGBR following the launch of branded campaign activity. The BEI benchmark for SGBR in 2013 is 1.0 - a higher score than previously achieved individually by Gladstone region, Capricorn or Bundaberg.

In the intrastate market SGBR occupies a similar space to Outback Queensland, the Fraser Coast, Tropical North Queensland, Townsville, Northern NSW, Western Australia and the Sunshine Coast as places where you can reflect and recharge, relax, refresh and revitalise, be spontaneous and carefree and reconnect with family and friends.

The addition of SGBR to the destination portfolio has already driven some perception change – the region is now rated higher than Tropical North Queensland as a destination to experience the Great Barrier Reef.

At 81%, destination awareness amongst Queenslanders for SGBR is higher than previously achieved by Capricorn, Gladstone region and Bundaberg on an individual basis. In 2012 awareness of the individual regions ranged from 66% to 72%, and 44% of Queensland would consider visiting each individual region. These results suggest that the SGBR has more meaning to consumers.

Key issues to consider for the Gladstone region as part of SGBR include;

- Approximately one third of Queenslanders have visited SGBR previously. First time visitors are a growth opportunity;
- BEI scores suggest that SGBR has better traction with regional Queenslanders than the Gladstone region brand. A challenge for the region and the SGBR is to increase the number of Queenslanders that would consider taking a holiday in the region;
- Strengthening association with core SGBR attributes (relaxation, recharging etc.) can help build consumer perceptions of the region; and
• While only a small proportion would not considered visiting SGBR, barriers to visitation cited by Queenslanders commonly include ‘lack of appeal’, ‘prefer a different sort of holiday’ and ‘nothing to do there’.

**Community Perceptions**

TEQ’s social indicators benchmark provides a means of examining the social impacts of tourism on local communities.

The 2013 study indicated that two in five of the region’s residents believe tourism has a positive impact in their community. Against their stated top positive impacts of tourism, comparisons with 2010 show that attitudes remain strong:

• Greater cultural diversity (91% compared with 87% in 2010);
• Important economic benefits (89% compared with 84% in 2010); and
• Increased regional profile (80% compared with 80% in 2010).

The majority of the region’s residents like tourists (62%) and hold a stronger view than average (64% compared with QLD 45%) of residents who want more tourists in their region. These findings are consistent with how residents feel about the impacts of tourism on both personal and community levels.

88% of residents also see festivals and events as great ways to attract tourists and raise awareness of the region. Respondents also agree that tourism increases community pride and leads to investment in public facilities and activities.

**Table 1: Contact with Tourists, Feeling and Development**

<table>
<thead>
<tr>
<th>Feelings About Tourists</th>
<th>QLD %</th>
<th>Glad. %</th>
</tr>
</thead>
<tbody>
<tr>
<td>I really like tourists</td>
<td>57</td>
<td>62</td>
</tr>
<tr>
<td>I tolerate tourists</td>
<td>31</td>
<td>30</td>
</tr>
<tr>
<td>I adjust my lifestyle to avoid tourists</td>
<td>10</td>
<td>4</td>
</tr>
<tr>
<td>I stay away from places tourists go</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact With Tourists</th>
<th>QLD %</th>
<th>Glad. %</th>
</tr>
</thead>
<tbody>
<tr>
<td>I never come into contact with tourists</td>
<td>22</td>
<td>17</td>
</tr>
<tr>
<td>I see tourists around but don’t usually talk to them</td>
<td>51</td>
<td>47</td>
</tr>
<tr>
<td>I often interact with tourists as part of my job</td>
<td>10</td>
<td>12</td>
</tr>
<tr>
<td>I often meet tourists around town and talk to them</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>I have made friends with tourists during their stay but have not kept in contact</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>I have made friends with tourists and kept in contact after they have left</td>
<td>4</td>
<td>3</td>
</tr>
</tbody>
</table>

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3 2013 Gladstone Region Social Indicators, TEQ
ABOUT THE DESTINATION
Destination Profile

Destination Description

More than just the gateway to the Southern Great Barrier Reef and Capricorn Bunker group of Islands, the Gladstone region supersedes stereotypes.

Figure 4: Map of Gladstone Region

Gladstone

The City of Gladstone with the Port of Gladstone is better known as one of Australia’s major industrial and business centres playing home to many industrial and liquefied natural gas giants. Despite this the Gladstone region has also become a popular destination for holiday makers and sea changers alike.

The booming regional economy is underpinned by a healthy mix of manufacturing, mining, agriculture, mineral resources and energy industries. This economic stability, coupled with the idyllic natural surrounds of the Southern Great Barrier Reef, proximity to National Parks and the laid back coastal and rural hinterland lifestyles on offer in the region makes for the ideal destination for both visitors and life-style changers. The population of the region is set to double in the next twenty years from approximately 60,000 residents to 120,000 supported by the booming regional industries.

Discovery Coast

The Discovery Coast’s Agnes Water and Seventeen Seventy are relaxed seaside communities linked by kilometres of striking beach fronting the deep blue waters of the Southern Great Barrier Reef. Famous as the birthplace of Queensland, Seventeen Seventy was named after Lieutenant James Cook and his crew from the ‘Endeavour’ who came ashore on 24 May 1770.

It is now the only coastal departure point for many reef trip operators and fishing charters to the Southern Great Barrier Reef. The untouched natural surroundings and the absence of commercialisation is what make these communities so popular for residents and visitors alike. Imagine swimming in crystal clear waters, unwinding on your own deserted beach, kayaking or kite surfing beside dolphins playing, sailing and bushwalking. This is the essence of Agnes Water and Seventeen Seventy – untouched, exclusive and pure.

As the most northern surf beach on the East Coast of Australia; Agnes Water is a must for board riders seeking secluded, picturesque spots with unbelievable breaks and was voted into the 101 best beaches in Australia list. The area also offers safe swimming with beaches patrolled by lifesavers during peak seasons.

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4 www.gladstoneregion.info

5 OESR Statistics Reference
Competitive Strengths
The main competitive strengths of the Gladstone region and wider Southern Great Barrier Reef area are:

- **Diversity of experiences** across the region offering visitors an authentic holiday;
- **Proximity to the reef and island attractions** of the Southern Great Barrier Reef;
- **Coastal parks and pristine beaches**, spectacular natural attractions, National Parks and gorges;
- Excellent range of **fishing, golfing and other ‘niche’ holiday experiences**;
- **Cultural heritage** and Indigenous attractions/sites;
- Friendly **people & community lifestyle**, tropical climate;
- **Relaxed and peaceful** atmosphere;
- **Good air access** serviced by major airlines, via Gladstone and Thangool airport.

- Key highways across the region, provide **excellent touring route opportunities**; and
- For the **Gladstone region**, the unique mix of industrial might, reef and bush experiences and coastal and rural lifestyles.

Regional Differentiation
The Gladstone region also works in partnership with neighbouring regional tourism organisations and regions:

**Southern GBR**
The Southern Great Barrier Reef (SGBR) region incorporates the Gladstone, Capricorn and Bundaberg regions. The aim of this partnership is to collectively market the region according to its competitive advantages and create products and infrastructure that reflect this.

The marketing and positioning of the Southern Great Barrier Reef is beginning to deliver results, (as documented in the BEI research on page 15). Gladstone region has the potential to continue to drive results and position itself as a primary gateway to the Great Barrier Reef. For this reason, additional visitor information, opportunities and challenges for the Gladstone region from a SGBR context are summarised in Appendix 1.

**Figure 5: Map of SGBR Region**

Central Queensland
The Central Queensland region is used by the Government for reporting purposes. It incorporates the Gladstone and Capricorn tourism regions.

**Figure 6: Map of Central Queensland Region**
Destination Hero Experiences and Themes

A tourism ‘experience’ is the emotional feeling or personal achievement a visitor derives from the purchase, participation or consumption of a tourism product – accommodation, attractions or tours. The ‘tourism product’ is what the customer buys; the ‘tourism experience’ is what they remember.

In alignment with the Gladstone region’s Destination Tourism Strategy 2012-2016, four destination ‘hero’ experiences were developed in 2012 to deliver the regions 2016 tourism vision, brand promise and the ‘themes’ that underpin the destination’s vision and brand.

Hero experiences are those world-class experiences that:
- Provide a destination with a real competitive advantage over other destinations,
- Focus on what is truly unique or memorable or engaging about a destination, and
- Meet the needs of the identified target markets.

The four themes and associated ‘hero experiences’ identified for the Gladstone region are:

**Southern Great Barrier Reef**
Walk straight from your private sanctuary on a secluded coral cay into the magical world of the Great Southern Barrier Reef where you can dive with marine locals.

**Fishing**
Treat yourself to the ultimate fishing experience, combining the quest for Barramundi in some of Queensland’s top inland fishing spots and spectacular deep sea fishing in the Southern Great Barrier Reef.

**Regional Character**
Explore towns and country experiences where man, machines and Mother Nature have joined forces in this unique region to power Queensland and provide a healthy outdoor lifestyle.

**Beach Culture**
Join locals as they enjoy a laid back and uncrowded beach lifestyle in coastal communities.
Destination Vision and Brand

The 2020 Destination Vision for Gladstone region is to:

*Develop its leisure and business experiences to their full potential to enhance the liveability and tourism appeal of the destination.*

This vision reflects a gradual evolution of the focus outlined in the Destination Tourism reflecting the growing importance of the business tourism sector.

**Brand Hierarchy**

The brand message delivered to a target market differs depending on how far away the market is from the destination. As a rule of thumb, the further away a customer is from the destination, the larger the area they are aware of. The exception of this rule is where they are travelling for a specific purpose (VFR, business, special interest) in which case they will know a particular location by name (see Figure 7 below). In this way, the Southern GBR is a primary vehicle for international and interstate leisure travellers, then Gladstone region for Queensland travellers, followed by the sub-regions as the campaign gets more specific. For locals, using town names is an easy way to engage.

The region is a part of a number of marketing partnerships that reach its consumers. These include those outlined in Table 2 on the over page. Depending on which market the destination is promoting will dictate the core brand promise:

- In the interstate and international fly and fly-drive markets it is the **Southern Great Barrier Reef**.
- In the interstate and long-haul drive market it is the touring routes of **Leichhardt; Burnett; Dawson and Bruce Highways** and **Southern Great Barrier Reef and Gladstone region**.
- In niche markets and for locals the destination will use the **sub-regions (Gladstone and Discovery Coast)**.

The core brand promise used in a campaign is not designed to exclude the other brands, but to identify how the key elements of our broad range of visitor experiences contribute to the broader Queensland brand family. The resulting marketing activity aims to maximise overall growth opportunities for the region and needs to leverage the brand with the greatest awareness and retention. In some cases internationally, the core brand promise is Queensland Australia, which does not exclude recognition of our other many regional and local strengths and use of these in marketing initiatives for local target markets where appropriate.

*Figure 7: Google Trends (Search Popularity)*

![Google Trends Chart](chart.png)
### Table 2: Brand Messages by Market

<table>
<thead>
<tr>
<th></th>
<th>Locals / Central Queensland</th>
<th>Brisbane/SEQ</th>
<th>Qld.</th>
<th>Interstate</th>
<th>Niche Markets</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gladstone Region Queensland</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Central Queensland</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Southern GBR</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td><em>Sub regions:</em></td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gladstone</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Discovery Coast</td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>
Competitor Analysis

The primary purpose of visitation to the Gladstone region is holiday, followed by business and visiting friends and relatives (VFR).

It possesses four distinct ‘hero experiences’:

- Southern GBR,
- Fishing,
- Regional character and
- Beach culture.

A comparison of the Gladstone region against other destinations has been made to identify the destination’s biggest competitors or which destinations are similarly positioned in terms of ‘experience’ offerings (Table 3).

In the domestic arena, the Gladstone region competes with other ‘Connector’ destinations in Queensland and NSW. Primarily these include the drive market, family beach holidays and active exploring along with a range of niche markets including fishing. Internationally, the Gladstone region is in the very early stages of building a reputation with a range of marketing messages including The Southern Great Barrier Reef (which includes Bundaberg and Capricorn) and the Pacific Coast Touring Route (which stretches from Sydney to Cairns).

In terms of the international market, the region competes with other parts of the GBR for its share of visits.

The Gladstone region needs to continue to partner with its neighbours to gain some market share and ensure its own ‘hero experiences’ stand out against its competitors by meeting global best practice in terms of marketing strategies for continued visitation growth.

<table>
<thead>
<tr>
<th>Table 3: Competitor Analysis against the Hero Experiences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination</td>
</tr>
<tr>
<td>----------------------------------------------------------</td>
</tr>
<tr>
<td>Gladstone Region</td>
</tr>
<tr>
<td>Capricorn</td>
</tr>
<tr>
<td>Bundaberg</td>
</tr>
<tr>
<td>Fraser Coast</td>
</tr>
<tr>
<td>Mackay</td>
</tr>
<tr>
<td>Sunshine Coast</td>
</tr>
<tr>
<td>Southern Queensland Country</td>
</tr>
<tr>
<td>Outback Queensland</td>
</tr>
<tr>
<td>Savannah Way</td>
</tr>
<tr>
<td>Country Way</td>
</tr>
<tr>
<td>Pacific Coast Touring Route</td>
</tr>
<tr>
<td>Coffs Harbour (NSW)</td>
</tr>
<tr>
<td>Central Coast (NSW)</td>
</tr>
<tr>
<td>Port Macquarie (NSW)</td>
</tr>
<tr>
<td>Thailand</td>
</tr>
<tr>
<td>Bali</td>
</tr>
<tr>
<td>Micronesia</td>
</tr>
<tr>
<td>Mexico</td>
</tr>
<tr>
<td>Indian Ocean</td>
</tr>
<tr>
<td>Caribbean</td>
</tr>
</tbody>
</table>
Delivering Community Vision through Tourism and Events

The role and economic contribution of tourism and events in the Gladstone Region has been well-recognised and incorporated into a wide number of corporate strategies to direct planning, economic and social outcomes. Some of the pertinent strategic background is contained in documents which relate to the Central Queensland area (Gladstone and Capricorn regions) and the Southern Great Barrier Reef Region (Gladstone, Capricorn and Bundaberg North Burnett regions), reflecting previous and current partnership working arrangements.

Regional and Local Strategic Context

Key strategic plans include:

The Gladstone Region Destination Tourism Strategy, 2012-2016 sets the strategic context for the industry - In 2016 the Gladstone region will:

*Develop its leisure experiences to their full potential to enhance the liveability and tourism appeal of the destination.*

Gladstone Area Promotion and Development Ltd (GAPDL) is the peak tourism industry body and regional tourism organisation for the Gladstone region – covering the Gladstone Regional Council Areas.

The Strategy identifies growth markets to develop its leisure experiences to their full potential to enhance the liveability and tourism appeal of the destination, recognising that the regional economy and population growth of the Gladstone region is underpinned by mining, mineral resources and energy industries. It further identified that growth will be delivered via the potential of the Southern Great Barrier Reef through primarily targeting the ‘Connectors’ and ‘Active Explorers’ and ‘Social Fun Seekers’ markets.

At a regional level the tourism direction has also been clearly articulated in:

- *The Gladstone Region Hero Experiences program* identified the vision, core promise, hero experiences and themes for the region i.e. - Southern Great Barrier Reef, Regional Character, Beach Culture and Fishing.
- Key catalyst and projects identified in the Central Queensland Tourism Opportunity [TOP] Plan 2009 – 2019, including:
  - Development of a Gladstone showcase facility,
  - Improved access to Agnes Water and 1770 and a Master Plan development
  - Rockhampton - Gladstone public transport link,
  - Development at Kroombit Tops including improving access, signage and accommodation facilities.
  - Niche trail development that promoted dispersal throughout the region.

Since preparation of the Tourism Opportunity Plan, the SGBR Dive Opportunities study has also identified potential in development of the dive and snorkelling market.

At a local level tourism is identified as playing an important role in the sustainability of the regional economy:

- *The Gladstone Region Economic Development Strategy, 2010* noted that the Gladstone region will continue to develop its tourism sector through co-ordinated regional branding and product development and that tourism promotion and development will build on the region’s existing coastal, city and

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Please note – this is not an exhaustive list of the Region’s corporate strategies, rather a highlight of the key documents that link to tourism.
rural assets to provide a fully integrated and appealing regional tourism offer.

Queensland Strategic Context

Key strategic plans include:

**The Queensland Plan** is a 30-year vision for Queensland that identifies local and state-wide priorities. It will set the high level direction for Queensland’s future and will be delivered through a series of supporting strategies and action plans. In the working draft document, tourism has been identified as a key economic contributor; “being recognised as internationally competitive with strong exports/ business especially in the agricultural (food bowl) and Ecotourism sectors”.

**The 20 Year Tourism Strategy and the outcomes of DestinationQ** provide key strategic goals for the sector. They emphasise the roles of investment facilitation and attraction, nature-based tourism, the drive market (including the Queensland Drive Tourism Strategy 2013-2015), and the important role of events (2020 Strategic Marketing Plan).

**The Queensland Ecotourism Plan 2013-2020** provides a clear direction for facility investment in parks and for Queensland to regain its position as the number one ecotourism destination through world-leading interpretation and presentation.

**Queensland Drive Tourism Strategy 2013-2015** as part of the 20 Year Tourism Strategy aims to ensure a better understanding of linkages between tourism demand, infrastructure requirements and road user conflicts. Drive tourism is the lifeblood of the tourism industry in many regions. It is vital in facilitating regional dispersal and access to Queensland’s many and varied visitor experiences. Driving is also the only or main way to get to many Queensland destinations including those located in the Southern Queensland Country region.

**The Arts for All Queenslanders strategy 2014-18** prioritises cultural tourism as a niche market with potential to contribute to tourism targets. Though relatively small in number, cultural tourists stay longer and spend more. The strategy aims to support delivery of original, imaginative and high quality arts and cultural events and experiences that attract visitors and strengthen local community identity and pride.
Figure 8: Alignment with State and National Plans

**COMMONWEALTH**
- Tourism 2020
- Queensland Plan 30-Year State Vision (working draft, Dec 13)
- 2020 Strategic Marketing Plan

**STATE**
- 20 Year Tourism Strategy
- Queensland Ecotourism Plan 2013-2020
- DestinationQ
- Queensland Drive Tourism Strategy 2013-2015

**REGIONAL**
- Gladstone Region DTP
- Gladstone Region Destination Tourism Strategy 2012-2016
- Central Queensland Tourism Opportunity Plan 2009-2019

**LOCAL**
- Gladstone Regional Council Corporate Plan
- Gladstone Regional Council Community and Economic Development Plans

Queensland Plan 30-Year State Vision (working draft, Dec 13)
Marketing and Promotion

The Gladstone region is collectively promoted under the umbrella of Southern Great Barrier Reef in partnership with the Bundaberg North Burnett and Capricorn regions. The Great Barrier Reef project, led by TEQ, will guide this positioning.

The Gladstone region will take ownership of its share of the Southern Great Barrier Reef through the key experiences of Heron Island, Lady Musgrave Island and the Discovery Coast in addition to a range of value-added city and adventure experiences. Successful development and positioning of the SBGR brand will be a key factor in attracting visitors to the region in the future.

Southern Great Barrier Reef and the Gladstone region are collectively promoted under the creative framework of Brand Queensland - a strategy that ensures Queensland’s destinations and experiences are positioned in a way that focuses on competitive advantages and connects with visitors. A cornerstone is four key experience themes:

- Queensland Lifestyle;
- Islands and Beaches;
- Natural Encounters; and
- Adventure.

Product and Infrastructure Development

The Tourism Opportunity Plan for Central Queensland recognised the need to grow destination appeal and deliver on the destination aspiration through the development of innovative tourism projects. Catalyst projects include:

- Development of a Gladstone showcase facility;
- Improved access to Agnes Water and 1770 and a Master Plan development;
- Gladstone - Rockhampton public transport link;
- Development at Kroombit Tops including improving access, signage and accommodation facilities;
- Niche trail development that promoted dispersal throughout the region; and
- Foster new product development in the Gladstone region in recognition of the recommendations of the Great Barrier Reef project.

Subject to identifying resources and the projects being identified as priorities by the responsible agencies, these projects remain strategically important for the region.

Industry Development

Build the reputation of the destination for delivering quality product and service standards, through industry development programs such as: domestic and international ready, better business practice, service delivery, digital ready, and crisis management.

Deliver world class marine tourism experiences in accordance with the recommendations of the Great Barrier Reef project by conducting specific skills and training programs.

Management of the Region’s Natural Environment

The natural environment is at the core of the Regional and SGBR tourism products and experiences. It is important that environmental issues which impact on the industry are identified, managed and communicated. Effective partnership relationships with Councils and key agencies such as Queensland Parks and Wildlife Service (QPWS) and Great Barrier Reef Marine Park Authority (GBRMPA) are essential in this regard.

Gladstone region has a particular challenge to overcome with the dichotomy between its renown as a base for industry and business, and its location within the Southern Great Barrier Reef.
MARKET OPPORTUNITIES
Current Visitor Profile

Visitors

This past year (YE June 2013), the Gladstone region received approximately 482,000 domestic overnight and 605,000 domestic day trip visitors. This represents a 7% increase in domestic overnight visitors and a 27% growth in day trips over the past five years – this performance compares favourably with performance for the SGBR area as a whole.

In terms of international visitors, the Gladstone region saw 54,000 international visitors this past year (YE June 2013), noting a 3% decline in visitation from 2009.

Visitor Nights

In the Year Ending June 2013, domestic overnight visitors to the Gladstone region stayed a total of 1.9 million nights. In this same period international visitors stayed for a total of 564,000 nights.

Origin of Visitors

Domestic overnight visitors are primarily intrastate (87%), with the majority of these visitors from regional Queensland (66%).

All domestic day trip visitors are from regional Queensland.

The top three international visitors to the Gladstone region are the United Kingdom, New Zealand and Germany (Table 4).

Table 4: International Markets to the Gladstone Region

<table>
<thead>
<tr>
<th>Country of Residence</th>
<th>% of Int. Visitors to Gladstone</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Kingdom</td>
<td>24%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>15%</td>
</tr>
<tr>
<td>Germany</td>
<td>13%</td>
</tr>
<tr>
<td>USA (incl. Hawaii)</td>
<td>7%</td>
</tr>
<tr>
<td>Other Countries</td>
<td>41%</td>
</tr>
</tbody>
</table>

Purpose of Visit

The primary purpose of visit for both domestic overnight and international visitors is holiday, followed by business and visiting friends and relatives (VFR).

Figure 9: Purpose of Visit – Overnight Visitors

Expenditure

Research from Tourism Research Australia\(^8\) for Central Queensland, indicates that average nightly expenditure for domestic overnight visitors is $132 and $67 for international visitors. This is significantly lower than the State average of $181 and $92 respectively.

Average Length of Stay

The average length of stay (ALOS) for domestic overnight visitors to the Gladstone region is 4.0 days (YE June 2013) and has increased by 2% over the past five years. This is slightly higher than competitors Fraser Coast (3.6), Bundaberg (3.3) and Capricorn (3.7), but lower than the State average (4.2).

\(^7\) All other countries have been combined due to low sample sizes.

\(^8\) Regional Tourism Profiles 2011/12
International ALOS for the Gladstone region is 10.4 days and this has increased by 8% since 2009.

Seasonality

Accommodation data from the Australian Bureau of Statistics (ABS) for Central Queensland indicates a mild seasonality pattern in room nights occupied. September and December quarters are the most occupied, indicating a possible preference for travel during the warmer months and/or during school holidays.

Figure 11 below depicts the five year average of room nights occupied for Central Queensland showing this trend.

Activities

Eating out at restaurants is the most popular activity for domestic overnight and international visitors to the Gladstone region. This is followed by visiting friends and relatives for domestic visitors and sightseeing/looking around for international visitors.

Figures 12 and 13 highlight the top ten activities for each market.

Data suggests a preference towards social and nature-based activities in both markets. For domestic visitors, bushwalking, national parks and beaches feature on the top ten – acknowledged strengths for the region.

Figure 12: Top Ten Domestic Overnight Activities (YE June 2013)
Tourism Profile

With regard to key annual data and profile measures for the Banana region, these include:

<table>
<thead>
<tr>
<th>Overview</th>
<th>QLD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors - overnight and day trips (‘000)</td>
<td>54,653</td>
</tr>
<tr>
<td>Nights (‘000)</td>
<td>113,344</td>
</tr>
<tr>
<td>Spend ($ million)</td>
<td>$20,164</td>
</tr>
<tr>
<td><strong>Domestic Overnight</strong></td>
<td></td>
</tr>
<tr>
<td>Visitors (‘000)</td>
<td>16,986</td>
</tr>
<tr>
<td>Spend ($ million)</td>
<td>$12,575</td>
</tr>
<tr>
<td><strong>Day Visitors</strong></td>
<td></td>
</tr>
<tr>
<td>Visitors (‘000)</td>
<td>35,673</td>
</tr>
<tr>
<td>Spend ($ million)</td>
<td>3,746</td>
</tr>
</tbody>
</table>

---

Figure 13: Top Ten International Activities (YE June 2013)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eat out / dine at a restaurant and/or cafe...</td>
<td>50%</td>
</tr>
<tr>
<td>Sightseeing/looking around</td>
<td></td>
</tr>
<tr>
<td>Go to the beach (incl swimming, surfing, diving)</td>
<td></td>
</tr>
<tr>
<td>Go shopping for pleasure</td>
<td></td>
</tr>
<tr>
<td>Visit national parks / State parks</td>
<td></td>
</tr>
<tr>
<td>Pubs, clubs, discos etc</td>
<td></td>
</tr>
<tr>
<td>Go to markets (from 2000 onwards)</td>
<td></td>
</tr>
<tr>
<td>Bushwalking / rainforest walks (from 2002 onwards)</td>
<td></td>
</tr>
<tr>
<td>Visit botanical or other public gardens</td>
<td></td>
</tr>
<tr>
<td>Visit wildlife parks / zoos / aquariums</td>
<td></td>
</tr>
</tbody>
</table>

---

9 Average annual data 2009-2012, TEQ
Market Opportunities

**Business Tourism** accounts for almost one in three overnight visitors to the Gladstone region (29%). The market is broadened further when day visits are factored in. Opportunities for market growth are twofold;

- While most business visitors have only short stays in the region, a dedicated program which aims to increase average length of stay by adding leisure experiences could generate significant additional value to the region. An enhanced entertainment, hospitality and retail offer, particularly in Gladstone will extend the opportunity further.

- Entry into the MICE market, leveraging the potential of the Gladstone Entertainment and Conference Centre (GECC) as the principal events venue – positioning the Region as a new player in the market. There is significant potential to develop a clear position if the Region’s unique beach, reef and adventure experiences are successfully packaged as part of the events and conferencing offer.

**Visiting Friends and Relatives** becomes a key market opportunity when considering 27% of all domestic visitors come to Gladstone region to visit friends and relatives. This opportunity grows when Gladstone’s predicted population growth and the potential opportunities of the FIFO market are considered. A small increase in the percentage of locals that invite relatives to stay or in the length of stay by visitors could dramatically impact on the value of the visitor economy.

**Niche markets** including adventure and nature tourism represent opportunities for growth from a low base. In 2013 a very small proportion of all domestic and international visitors came to the region for adventure or nature-based activities. Establishing compelling industrial tourism experiences has the potential to add an additional set of niche attractions which support the overall leisure market.

**Fishing** including related events is a product strength across the whole Region and represents a future growth opportunity. Growth can be unlocked through reinvigorated social media-driven marketing which presents package and itinerary options and targeted investment in fishing-friendly infrastructure at visitor hubs.

**Events Tourism** is a growing trend nationally, particularly participation in sports and events. With less than 5% of domestic visitors travelling to the region for events, there is potential to grow.

**Building awareness** is vital to growing numbers. Table 4 over page shows what brands are promoted into which markets at present. The **drive** and **beach** markets will continue to be key for the Region.
Market Segments

International

Tourism Australia (TA) has defined its international target market as the ‘Experience Seeker’ who are globe trotters looking for authentic interactions, brag-able locations to get off the beaten track and to immerse themselves in local culture. Experience Seekers are Australia’s highest yielding international market and are more likely increase to their length of stay and average spend in comparison to others.

To promote the vast array of unique Australian adventures to this target market, seven key Australian Experience Themes have been identified:

1. Nature in Australia
2. Aboriginal Australia
3. Journeys
4. Outback Australia
5. Australian Coastal Lifestyle
6. Australian Major Cities
7. Food & Wine

Internationally (via SGBR) the Gladstone region offers products that deliver to four of the seven experience themes (not Aboriginal, Major Cities or food and wine).

Domestic

Tourism and Events Queensland’s (TEQ) extensive research into the domestic market has defined six market segments based on visitor needs and wants giving valuable insight into consumers’ emotional connection to what they expect from a holiday.

These market segments are seeking experiences that Queensland can offer under the following experience themes:

1. Natural Encounters
2. Queensland Lifestyle
3. Islands and Beaches
4. Adventure

The Gladstone region offers experiences that deliver on all four of the primary Queensland experience themes but none are exclusive to the region. The challenge remains to carve out a unique selling point in the same way other destinations (Bundaberg turtles, Whitsunday island luxury, etc) have been established.

GLADSTONE REGION TARGET MARKETS

**Tier One**
- Connectors in Regional Queensland and Brisbane (400km radius of Gladstone region).

**Tier Two**
- Active Explorers in Sydney and Melbourne
- New Zealand, United Kingdom and North America, promoted as Southern Great Barrier Reef.

**Tier Three**
- Social Fun-seekers
- Europe, promoted as Southern Great Barrier Reef.

**New and Developing**
- China, promoted as Southern Great Barrier Reef

Connectors – Connectors see holidays a chance to connect with people they care most about. They will often subordinate their own preferences in terms of activities to ensure everyone has a good time.

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

Our Vision

The 2020 Destination Vision for Gladstone region is to:

*Develop its leisure and business experiences to their full potential to enhance the liveability and tourism appeal of the destination.*

- For **Gladstone** this means fully developing the potential of the city as a business hub and establishing it as a new conference, events and meetings destination. Developing a broader range of accessible and compelling leisure experiences alongside the business and conferencing offer is fundamental to delivering overall industry potential.

- For the **Discovery Coast**, this means building recognition and appeal as a holiday destination. Increased visitor numbers and lengths of stay will be unlocked via encouraging new and enhanced reef, island and activity experiences, alongside investment in essential tourism precinct and access improvements. Developing its positioning as a centre for health and well-being provides an opportunity to complement the area’s appeal as a destination to enjoy Queensland’s laid back and un-crowded beach lifestyle.

Our Goals

- Grow the Region’s share of Queensland’s conferences and exhibitions market to 3.5%, and increase the average length of stay of **business visitors** by a quarter of a day by linking business trips to easily accessible leisure experiences and events.

- Grow **VFR** market share by 5% per annum, and support growth. Growing awareness of the opportunities ‘in our own backyard’ and unlocking the potential of a growing population base will require raising awareness of leisure opportunities among the resident population and developing leisure options which generate visitor expenditure.

- Attract new **niche visitors** coming for nature and adventure experiences, seeking 2% per annum growth in Gladstone region’s market share (for the whole of Queensland). Pre-requisites for achieving the growth are a mix of **new and enhanced product development** and enhanced National Park and marine/diving/islands experiences, whilst also profile/ awareness raising in target markets via a **major marketing campaign** under the Southern GBR banner.

- Attract new niche **fishing visitors**, increasing market share by 1% per annum. Growth will be driven by targeted infrastructure investment and social-media driven marketing.

- Grow events expenditure by extending the average length of stay of events visitors by 0.5 days - developing the appeal, packaging and sustainability of **existing events**, and developing new events which fill identified gaps in the Region’s events calendar.

- Support **new product investment** to develop the potential of the Region’s islands and reefs including Heron Island, Lady Musgrave Island and the Capricorn Bunker Group, and develop additional opportunities to access SGBR reefs and islands as catalysts to **new product investments**.

- Establish a **new drive route/ itinerary within the Gladstone region** supported by appropriate signposting and marketing collateral/activity which incorporates key Gladstone and Discovery Coast
destinations in addition to linking with key attractors in neighbouring RTO areas where appropriate, adding to the overall strength of the proposition.

- Establish effective and practical working partnerships within the industry and with public sector agency partners as a key enabler to unlocking growth potential.

**What Does the Future Hold? – Megatrends**

CSIRO and the Queensland Government recently identified seven megatrends that are likely to shape the Queensland Tourism sector to 2033. The seven megatrends and just some of the implications for the Gladstone region are:

1. **The Orient Express**

   The world economy is shifting from west to east and north to south. This is creating new markets and new sources of competition.

   **Implications for the Gladstone Region**

   Asian visitors currently make up a very small proportion of the region's visitors. If the broader SGBR region is to capitalise on the anticipated national growth, it must have a clear Asian market strategy including:

   - The need to build understanding and awareness of their need,
   - Working in partnership at SGBR level, to develop compelling experiences
   - More businesses being 'international-ready'
   - Building cross-over to leisure tourism growth from mining and other economic growth areas.

2. **A Natural Advantage**

   In a world where ecological habitats are disappearing the unique natural assets of Queensland will become a stronger drawcard.

   **Implications for the Gladstone Region**

   The region needs to develop tourism experiences in natural areas that are unique and differentiated from competitors to take advantage of this trend. This relates to bush and rural experiences as well as coastal and island destinations.

   The Region needs to actively manage public perceptions i.e. dichotomy between its roles in business/industry and leisure.

   Partners need to develop compelling experiences which stand out in the marketplace.

3. **Great Expectations**

   Tourists of the future will have expectations for authentic and personalised experiences often involving social interaction.

   **Implications for the Gladstone Region**

   The region's businesses need to respond to the challenge and deliver quality service and experiences.

4. **Bolts from the Blue**

   Climate change and infectious disease outbreaks combined with safety concerns will have increased impact. Economic ‘shocks’ (whether planned or unplanned) resulting from rapid acceleration or downscaling also will have a significant impact.

   **Implications for the Gladstone Region**

   Businesses and tourism managers need to monitor opportunities and be ready to respond, with imaginative marketing, packaging and pricing offers.

   Businesses and destination managers need to be ‘disaster-ready’ and have resilience plans in place.

5. **Digital Whispers**

   People are changing the way they access and trust information in an online world.

   **Implications for the Gladstone Region**

   The region needs to embrace a multichannel approach to communication and promotion. This includes building business skills and capacity and delivering new virtual travel/experiences in the form of providing rich information.

6. **On the Move**

   Humanity is increasingly mobile from trade, business, events, education and healthcare with people travelling further and more frequently.
Implications for the Gladstone Region

Maintaining air capacity is key to maximising the potential of this trend. In the case of the Gladstone region, the maintenance of existing linkages to Brisbane and Sydney as well as other regional airports i.e. Biloela, providing links to international hubs and entry points is crucial.

Drive access is also of great importance to the Region, as is public transport, especially for the youth market in accessing Agnes Water/Town of 1770.

7. The Lucky Country

Australia and Queensland are increasingly wealthy, but expensive destinations gifted with cultural and demographic diversity.

Implications for the Gladstone Region

The need to compete on quality, experience and service will have implications for investment and development decisions and destination and business levels.
Opportunities for Growth

As outlined on page 30, five market segments have been identified with the potential to grow to reach the 2020 target of $371M (an extra $124M) across international and domestic markets. They are: VFR, business, Niche (nature/adventure and fishing), and events. Remaining visitors are expected to grow at TFC growth rates.

Figure 14: Contribution to the 2020 target by segment (in $ millions)

- If three in every four residents brought in one additional VFR visitor, Gladstone region would see an additional 58,000 visitors (based on the current regional population). However, population projections for Gladstone Regional Council forecast an increase of approximately 50,000 to 111,690 people by 2031. When the non-resident population (FIFO) is also considered there is significant potential to generate net new expenditure in the VFR sector. The Region’s new and growing population provides a sound basis to generate growth in this sector of the visitor economy.

- A secondary strategy alongside generating additional VFR trips is action to increase the average VFR spend per head by 25% above inflation. In order to achieve this ambition, the Region will require a broader range of accessible and compelling experiences – providing options for expenditure generation. New product development and enhanced existing product are required to generate a higher value for money and thus higher spend per visitor.

2) Business

In order to achieve the Business Tourism 2020 target of $138M ($60M) higher than current value), Gladstone region will need to capture 3.5% of the State’s conferences and exhibitions sector, and grow its current business tourism market share by 5% per annum.

- Grow the Gladstone region’s share of the State’s Conferences and Exhibitions market from 0.8% to 3.5% - generating 11,000 additional visitors and a value by 2020 of $8.5M

- Increase the average length of stay of business visitors by 0.25 of a day by linking more business trips to leisure experiences and events. This equates to an additional 52,000 visitors and an additional 213,000 visitor nights by 2020. A pre-requisite to deliver on this ambition will be developing a broader range of accessible experiences for visitors, including the retail, food and drink and entertainment offer in Gladstone.
3) Events

In order to achieve the events 2020 target of $14M ($7M higher than current value), Gladstone region will need to **extend average visitor length of stay by 0.5 days**. This equates to an additional 3,000 visitors and 16,000 visitor nights by 2020. This target can be accomplished by;

- Maximising the value and impact of existing events by establishing a regional events calendar, ensuring that events are profiled via State and national distribution channels;
- Working with local and regional partners to co-ordinate scheduling of events to maximise event impact;
- Marketing and support program to develop the appeal, packaging and sustainability of existing events;
- Partnering with GECC and other key venues on large-scale consumer events to build region-wide impact; and
- Identifying opportunities to develop new events which fill identified gaps in the Region’s events calendar.

4) Niche Tourism (Nature and Adventure)

In order to achieve the niche tourism (nature and adventure) 2020 target of $53M ($13M higher than current value), Gladstone region will need to **grow its current market share by 2% per annum**. This equates to an additional 11,000 visitors and 57,000 visitor nights by 2020. Pre-exquisites for achieving this growth are;

- Developing a mix of new and enhanced products and enhanced National Park/ National Trail and marine/diving/islands experiences, and profile/awareness raising in target markets via a **major marketing campaign** under the Southern GBR banner;
- Establishing a **major new drive route**, supported by appropriate signposting and marketing collateral/activity which incorporates key Gladstone and Discovery Coast destinations and products in addition to key attractors in neighbouring RTO areas, where these add to the overall strength of the proposition. This drive route can be a key product which improves connectivity and links with the core SGBR marketing proposition;
- Maximising the potential of Heron Island and develop additional opportunities to access to SGBR reefs and islands as catalysts to new product investments; and
- Establishing a close working **partnership with QPWS and Councils** to develop sustainable ecotourism and activity options in the Region’s key National Parks, national/regional trails, and landscapes/protected landscapes.

5) Niche Tourism (Fishing)

In order to achieve the niche tourism (fishing) market 2020 target of $44M ($19M higher than current value), Gladstone region will need to **grow its current State market share by 1% by 2020**. This equates to an additional 24,000 visitors and an additional 122,000 visitor nights by 2020. Achieving this target growth will require;

- Reinvigorating visitor interest in the Region’s fishing product, via a user-generated social media site for avid fishing enthusiasts using celebrity endorsements and a targeted social media campaign to drive awareness and showcase value-added products (charter hire, tour guides, accommodation, equipment hire);
- Infrastructure investment at key locations i.e. facilities for fish gutting/adequate parking at quayside, bbq facilities etc; and
- Partnership formation to guide direction and share investment (within region and with neighbouring RTOs/councils where appropriate).
Figure 15: Market Mix Contribution (by Visitor Nights)

![Graph showing market mix contribution by visitor nights for 2013 Markets, 2020 Stretch Markets, and 2020 Stretch Markets.

- **Events**
- **Business Events**
- **Fishing**
- **Nature/Adventure**
- **Business**
- **VFR**
- **Additional Visitors**

The graph compares visitor night contributions across different market segments and years.
Destination 2020 Target

To help achieve Central Queensland’s 2020 target aspiration of $1.16 billion, the Gladstone region will have to contribute approximately $371 million (32% of the Central Queensland 2020 target) towards the 2020 target. In order to do this, key market segments need to be harnessed to drive growth in the region.

Table 5: Key Market Segments towards Achieving the 2020 Target

<table>
<thead>
<tr>
<th>Market Segment</th>
<th>Current Share of Total Visitors</th>
<th>Forecast Share of Total Visitors in 2020</th>
<th>Additional Visitor Nights</th>
<th>Additional Expenditure (estimated)</th>
<th>% Contribution to 2020 Target</th>
<th>$ Contribution to 2020 Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intrastate (QLD)</td>
<td>79.4%</td>
<td>77.8%</td>
<td>375,607</td>
<td>$75,462,054</td>
<td>63%</td>
<td>$232,856,124</td>
</tr>
<tr>
<td>Interstate</td>
<td>4.5%</td>
<td>4.4%</td>
<td>79,021</td>
<td>$15,875,897</td>
<td>13%</td>
<td>$48,988,857</td>
</tr>
<tr>
<td>TOTAL DOMESTIC</td>
<td>83.9%</td>
<td>82.2%</td>
<td>454,628</td>
<td>$91,337,951</td>
<td>76%</td>
<td>$281,844,981</td>
</tr>
<tr>
<td>New Zealand</td>
<td>2.3%</td>
<td>2.5%</td>
<td>76,079</td>
<td>$10,142,602</td>
<td>7%</td>
<td>$24,212,446</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>3.8%</td>
<td>4.5%</td>
<td>57,249</td>
<td>$7,632,254</td>
<td>5%</td>
<td>$18,219,737</td>
</tr>
<tr>
<td>North America</td>
<td>1.6%</td>
<td>1.8%</td>
<td>43,654</td>
<td>$5,819,892</td>
<td>4%</td>
<td>$13,893,262</td>
</tr>
<tr>
<td>Europe</td>
<td>6.8%</td>
<td>7.2%</td>
<td>51,051</td>
<td>$6,805,940</td>
<td>4%</td>
<td>$16,247,158</td>
</tr>
<tr>
<td>Asia</td>
<td>1.1%</td>
<td>1.2%</td>
<td>36,283</td>
<td>$4,837,209</td>
<td>3%</td>
<td>$11,547,399</td>
</tr>
<tr>
<td>Remaining International</td>
<td>0.5%</td>
<td>0.7%</td>
<td>14,804</td>
<td>$1,973,613</td>
<td>1%</td>
<td>$4,711,414</td>
</tr>
<tr>
<td>TOTAL INTERNATIONAL</td>
<td>16.1%</td>
<td>17.8%</td>
<td>279,119</td>
<td>$37,211,510</td>
<td>24%</td>
<td>$88,831,417</td>
</tr>
<tr>
<td>TOTAL VISITORS</td>
<td>100.0%</td>
<td>100.0%</td>
<td>733,748</td>
<td>$128,549,461</td>
<td>100%</td>
<td>$370,676,398</td>
</tr>
</tbody>
</table>

Table 5 identifies the key market segments for the Gladstone region and how these will play a role in achieving the 2020 target aspiration. Market figures have been identified based on the Deloitte Access Economics forecasts for Queensland and the Central Queensland region and are based on the assumption that the Gladstone region’s markets will grow proportionately to State market forecasts based on the region’s current market share (See Figure 16).

Figure 16: Destination 2020 Target

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10 The Gladstone region’s 2020 target aspiration towards the Central Queensland 2020 target has been set based on its proportion of visitor nights compared to Capricorn for the Central Queensland region.
Destination Growth Priorities

The following priority strategies have been targeted for the Gladstone region;

Catalyst Projects

1. Firmly establish the Gladstone Region as a part of the Southern Great Barrier Reef as a destination for easy enjoyment of reef, beach, bush and adventure.
2. Reinvigorate the Gladstone Region’s fishing product.
3. Establish a drive strategy which builds the case for better signage, road upgrades, development of touring routes in the SGBR and maps in the Gladstone Region.
4. Establish the Gladstone Region as a key strategic port for Queensland for the Cruise Industry.
5. Embrace a strategic approach to marketing of the Gladstone Region to maximise investment.
6. Establish the Gladstone Region as a recognised destination in the M.I.C.E market incorporating a strong events program.

Implications of Growth

If Gladstone region hits the 2020 growth target it will generate in excess of 733,700 additional visitor nights with implications for:

Access

These additional visitor volumes may have implications for road congestion at peak times. Pedestrian footfall and parking issues may occur in hotspots at peak times requiring additional visitor management techniques. Innovative approaches to delivering improved road, rail, air access & improved public transport will be required.

Access to wharf facilities at locations such as 1770 may also be stressed.

Accommodation

Based on the available data in the Australian Bureau of Statistics - Survey of Tourist Accommodation (2000-2013) for Hotels, Motels and Serviced Apartments, Figure 17 below shows the trend in room supply and demand for the Central Queensland region over the past 7 years. The ‘Guest Nights’ figures from 2013-2020 are based on the Tourism Forecasting Committee (TFC) predicted growth rates in Domestic and International room nights in commercial accommodation for QLD (applied to the region).
Figure 17: Accommodation Room Supply and Demand (Central Queensland)
Attractions
The projected increase in visitor numbers will be need to be accommodated in National Park Management plans and Local Government Planning Schemes to support new attractions and visitor hubs (e.g. Islands, Agnes Water and 1770).

Alongside visitor attractions, a program of events over peak, shoulder and off seasons will be needed to complement physical attractors and facilities, providing new reasons to visit.

There is a need for proactive promotion of development opportunities to unlock investment. This includes improved Drive Tourism routes, accompanied by appropriate packaging, marketing and infrastructure.

Other Infrastructure
A range of other infrastructure and services, from signage and public conveniences to town and coastal planning will need to maintained and upgraded in order to respond to growth.

A co-ordinated ‘whole of Gladstone region’ approach to destination planning and maintaining public assets is required in order to deliver a compelling set of experiences which entice new visitors and encourage repeat custom. A first step is engaging/ re-engaging partners and raising awareness of the projected tourism growth and its potential implications.

Strong relationships between LTOs, Councils and the RTO will be required to ensure common direction and unity and focus on tourism.

Destination Workforce
Research by Deloitte Access Economics indicates that the Region’s workforce is under pressure from other sectors and will experiences a shortfall under the TFC forecasts let alone the 2020 stretch targets.

Workforce development will be key determinant in helping the Gladstone region stand out from the crowd and achieve its 2020 ambitions.

Community
Tourism growth will at least in part be focused on certain locations and hotspots. Communities will need to be engaged in those areas as key delivery partners and stakeholders.

VFR will continue to be an important growth market – this is most effectively influenced by working at community level, building awareness of facilities and activities.

A friendly welcome is always an important part of the tourism experience. Communities will be stakeholders in delivering this welcome.
## Challenges and Opportunities to Achieving the Vision

During the consultation process, the following challenges and opportunities were identified towards achieving the vision for the Gladstone region.

<table>
<thead>
<tr>
<th>TOP CHALLENGES</th>
<th>TOP OPPORTUNITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Growing effective communication and partnership within the Region, growing awareness and understanding of tourism assets and opportunities.</td>
<td>Utilise DTP process as the catalyst to develop a new partnership approach across the region, establishing clear lines of communication and understanding of roles and responsibilities. Partnership should extend to growing awareness of tourism opportunities among residents ‘knowing our backyard’, helping generate visitation and influence visitor friends and relatives activity.</td>
</tr>
<tr>
<td>Connectivity within the Region – road and public transport access.</td>
<td>Develop a region-wide evidence-based approach to lobbying and making the case for key road and transport improvements for gaps in infrastructure (where these are impediments to delivering industry growth).</td>
</tr>
<tr>
<td>Health and Safety/ owner priority challenges in opening up the opportunity provided by industrial tourism.</td>
<td>Work with Government and operators to find practical solutions to the red tape challenge, and seek to establish at least one new signature experience which showcases the Region’s Resources and Agribusiness sector.</td>
</tr>
<tr>
<td>Grow the region-wide potential of business tourism via maximising the role of GECC and other suitable facilities within the Region, building attractive and unique packages and itinerary options.</td>
<td>Via development of partnerships with GECC and business partners across the Region, maximise the value of the business tourism sector region-wide, and establish a foothold in the conferences and exhibitions sector – creating a clear selling proposition for the region/ packaging high quality venues alongside unique itinerary options.</td>
</tr>
<tr>
<td>Pressures on public sector budgets – councils are key investors in tourism assets and infrastructure.</td>
<td>Develop strong partnerships with local, regional and State partners to maximise the impact and prioritisation of collective investment in the sector.</td>
</tr>
<tr>
<td>Managing the impact on the tourism industry of the peaks and troughs of the mining and resources sectors.</td>
<td>Gaining awareness and understanding of industry developments in the pipeline/ timescales - proactive planning with tourism partners to maximise opportunities and minimise downsides.</td>
</tr>
<tr>
<td>Maintaining and growing air routes and services to the Region’s airports.</td>
<td>Work closely with the airport and carriers to maintain and development services and route network. Examine opportunities for fly-drive packages.</td>
</tr>
<tr>
<td>Effective packaging and targeted promotion of the Region’s tourism products and destinations to meet key identified domestic and international visitor markets (including residents).</td>
<td>Maximise the impact of marketing investment via aligning branding (SGBR, regional, local) against target markets – a clearly evidenced marketing plan is required. Establish a new regional marketing strategy to guide investment and help align new product development.</td>
</tr>
</tbody>
</table>

Gladstone Region Destination Tourism Plan 2014-2020
<table>
<thead>
<tr>
<th><strong>Investment in new and high quality value-adding tourism experiences to attract visitors is required.</strong></th>
<th><strong>Focusing on the Region’s hero experiences – develop opportunities via events, town centre precincts (food and drink, retail etc.), adventure, reef/beach/island (alternative/ healthy lifestyles).</strong> Maximise development and investment opportunities including the potential offered by development of a marina at the Boyne River mouth.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Visitor access and services within the Region’s National Parks needs to be developed - priorities include Kroombit Tops, Deepwater and Eurimbula.</strong></td>
<td><strong>Establish close working partnership with QPWS, Councils and business partners to identify key barriers and opportunities to unlock the tourism potential of national parks.</strong></td>
</tr>
<tr>
<td><strong>The need for ‘precinct’ development in key towns and cities – visitor hubs.</strong></td>
<td><strong>Leveraging predicted population growth in Gladstone as the basis for enhanced services i.e. range of accommodation, enhanced food &amp; drink, retail and entertainment offers.</strong> Visitor infrastructure in Agnes Water/Town of 1770 – the Tourism Opportunity Plan identified the need for a Masterplan. Integrate planning for visitor-friendly facilities and infrastructure into key service centres.</td>
</tr>
<tr>
<td><strong>Unlocking the Region’s locational advantage i.e. proximity to island, diving, snorkelling and fishing experiences in the Southern Great Barrier Reef, linking nature agri-tourism experiences.</strong></td>
<td><strong>Promote opportunities to operators to provide options for visitors to access reef experiences.</strong></td>
</tr>
</tbody>
</table>
Enablers of Success

Partnership
- Reinvigorate tourism in the region through leadership and partnership working arrangements: GAPDL has formed a new Destination Tourism Development Group (DTDG) to develop, plan and clear roles for regional and local partners. The Alliance has obtained a formal relationship with the GAPDL Board, providing the opportunity to forge deeper links between tourism and other sectors of the economy.
- Strengthen local and regional partnerships in tourism and economic development including the SGBR partnership.
- Work with QPWS to prioritise investment in parks’ infrastructure to maximise ecotourism growth, where consistent with management and infrastructure plans.
- Build the case for roads and access investment, in particular;
  - Seeking support for implementing priority signposting improvements; and
  - Flood-proofing of key intra-region access routes.

Access
- Maintaining and developing Airport route and service networks ensuring that good air access to and within the Region remains a competitive advantage.

Voice for Tourism
- Undertake co-ordinated and evidence-based lobbying to ensure that regulatory frameworks are proactive in identifying future tourism opportunities and create an investor friendly environment, including; tourism-oriented planning schemes & frameworks, and key marine, fishing and parks regulations.
- Build community appreciation and support for tourism and future investment via co-ordinated communication – identifying tourism as a key pillar of the economy and contributor to liveability/quality of life

Capacity Building
Work with QTIC, TEQ and industry partners to boost business capacity in terms of;
- Mentoring, networking and support for businesses focusing on experience development, market awareness, international-readiness;
- Support for local event organisers to build professionalism and sustainability; and
- Implementing a service quality program to drive profitability and build civic pride, such as the Cruise Welcome Program.
DESTINATION STRATEGIES
Strategic Directions

The following section identifies the destination strategies required to help achieve the 2020 target for Gladstone region. Within each, a series of actions have been established as a means of delivering the identified strategies.

Each of the strategies have been prepared around 6 key themes that were developed in the Tourism 2020 Strategy which will enable regions such as Gladstone to develop products and experiences in line with their hero experiences.

Actions have been categorised as being; ongoing, year 1 (short term), year 2 (short term), year 3 (medium term) and years 4 to 5 years (longer term).

<table>
<thead>
<tr>
<th>Partners Acronyms</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts QLD</td>
<td>Arts Queensland</td>
</tr>
<tr>
<td>BNBTC</td>
<td>Bundaberg North Burnett Tourism</td>
</tr>
<tr>
<td>CE</td>
<td>Capricorn Enterprise</td>
</tr>
<tr>
<td>CoC</td>
<td>Chambers of Commerce</td>
</tr>
<tr>
<td>DCTC</td>
<td>Discovery Coast Tourism and Commerce Inc</td>
</tr>
<tr>
<td>DTMR</td>
<td>Department of Transport and Main Roads</td>
</tr>
<tr>
<td>GAPDL</td>
<td>Gladstone Area Promotion and Development Ltd</td>
</tr>
<tr>
<td>GECC</td>
<td>Gladstone Exhibition and Conference Centre</td>
</tr>
<tr>
<td>GPC</td>
<td>Gladstone Ports Corporation</td>
</tr>
<tr>
<td>GRC</td>
<td>Gladstone Regional Council</td>
</tr>
<tr>
<td>GRTA</td>
<td>Gladstone Regional Tourism Alliance</td>
</tr>
<tr>
<td>QPWS</td>
<td>Queensland Parks and Wildlife Service</td>
</tr>
<tr>
<td>QTIC</td>
<td>Queensland Tourism Industry Council</td>
</tr>
<tr>
<td>RACQ</td>
<td>Royal Automobile Club of Queensland</td>
</tr>
<tr>
<td>SGBR</td>
<td>Southern Great Barrier Reef</td>
</tr>
<tr>
<td>TEQ</td>
<td>Tourism and Events Queensland</td>
</tr>
</tbody>
</table>
1. Preserving Our Nature and Culture

Our unique, authentic character, cultural heritage and natural assets will be preserved and enhanced for visitors and locals alike, and will always be at the heart of iconic showcase Queensland experiences.

**Vision:** Firmly establish Gladstone Region, as part of the Southern Great Barrier Reef as a destination for easy enjoyment of reef, beach, bush and adventure experiences.

**Priority Project:** Improved access to Kroombit Tops National Park (and National Trail), and development of upgraded camping and walking tracks.

**Supporting projects:**
- Co-ordinated program of improvements to coastal access and visitor experience on the Discovery Coast
- Partnership work program with QPWS to develop the ecotourism potential of the Region’s national parks and special landscapes including the new Curtis Island Environment Precinct
- Co-ordinated and planned approach to development and marketing of adventure and nature experiences in Banana Shire and across the region as a whole.

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>PARTNERS</th>
<th>TIMING</th>
<th>MARKET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work with council and QPWS to create a proactive planning scheme/regulatory environment for Baffle Creek/Rules Beach which provides for sustainable development and tourism growth, and which considers;</td>
<td>GRC QPWS DCTC GAPDL</td>
<td>Ongoing</td>
<td>Niche Leisure</td>
</tr>
<tr>
<td>• Opportunities to develop new low density accommodation on the River Shoreline;</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Improved signage to Baffle Creek;</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Improved boat ramp provision;</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Work with Council an QPWS to restore public access to Rules Beach; and</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Improved access – consider opportunities and establish feasibility to establish a sealed road linking Baffle Creek to Agnes Water/1770.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position and establish Kroombit Tops and National Trail as the Region’s flagship inland adventure destination by;</td>
<td>QPWS</td>
<td>Years 1 and 2</td>
<td>Niche Leisure VFR</td>
</tr>
<tr>
<td>• Working with QWPS to develop and promote access and create new 2WD and 4WD trails within Kroombit Tops, and to surrounding National Parks including Bulburin NP to build attractiveness as a drive/4WD adventure destination; and</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Working with QPWS to develop and promote opportunities for ecotourism facilities including accommodation, activities and trails.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work with QPWS to gain input into the Management Plans and investment priorities for key national parks, trails and landscape areas, in order to improve the sustainable provision of improved access and visitor amenities, and deliver innovative and high quality adventure experiences – providing ‘must do’ reasons to visit. Key parks and landscape areas including;</td>
<td>QPWS GAPDL Councils DCTC</td>
<td>Years 1 and 2</td>
<td>Niche Leisure</td>
</tr>
<tr>
<td>• Colosseum National Park</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Expedition National Park;</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Isla Gorge National Park;</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
• Precipice National Park;
• Eurimbula National Park (Rodd’s Peninsula);
• Mouth of Baffle Creek Conservation Park;
• Deepwater National Park; and

Work with QPWS and industry to develop the leisure tourism potential of the new Curtis Island Environment Precinct, promoting access and amenity development in the area, and linking to Gladstone region’s business and leisure markets by;
• Identifying opportunities to partner with private enterprise to deliver the ecotourism potential of the site; and

Establish and implement a program of improvements to coastal access and visitor experience in the Discovery Coast. Opportunities include;
• Creation of a walking track from 1770 Headland to Agnes Beach along Sir Joseph Banks Reserve;
• Establishing an appropriate all-weather backpacker transit area;
• Investigating the feasibility of establishing a local bus service around Discovery Coast;
• Establishing a network of mountain bike trails;
• Beachfront amenities including exercise equipment;
• Improved signposting on key access routes;
• Development of a new pontoon at Agnes Water beach; and
• Boardwalk development from 1770 Marina to SES grounds area.

<table>
<thead>
<tr>
<th>MARKETING</th>
<th>PARTNERS</th>
<th>TIMING</th>
<th>MARKET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing to target markets which explains why the Region – its national parks, its coastline and adventure experiences are unique.</td>
<td>GAPDL DCTC</td>
<td>Years 1 and 2</td>
<td>All</td>
</tr>
<tr>
<td>Renewed and refreshed marketing to the 4WD and drive market emphasising the Region’s key visitor experiences and national parks and trails - incorporating Discovery Coast, Kroombit Tops - marketing based on ‘Must See and Do Hero Experiences’.</td>
<td>GAPDL DCTC</td>
<td>Years 1 and 2</td>
<td>Niche Leisure VFR</td>
</tr>
<tr>
<td>Work with neighbouring RTOs and QPWS to investigate the potential to create a unifying brand and message for the Sandstone Wilderness to cluster and package experiences for niche markets (e.g. 4WD).</td>
<td>GAPDL QPWS CE</td>
<td>Year 3</td>
<td>Niche Leisure</td>
</tr>
<tr>
<td>Market the uniqueness of the region through supporting niche trail development including indigenous art and artists.</td>
<td>GAPDL Councils DCTC Aboriginal Organisations</td>
<td>Years 4 and 5</td>
<td>Niche Leisure</td>
</tr>
</tbody>
</table>
## 2. Offering Iconic Experiences

Our destinations will build on and leverage their strengths and heroes - iconic people, places and events which are our points of difference - giving visitors life-long memories and many reasons to stay, explore and return.

**Vision:** The region will be famed for delivering a range of high quality visitor experiences (including adventure, beach, bush and reef at the heart of the Southern Great Barrier Reef) whilst also being the host region to a unique blend of world class industrial activities.

**Priority Project:** Review the Region’s hero experiences to identify gaps in the product and experience offer, as the basis for future planning and investment, and identify products that can deliver the hero experiences in Tier 1 & 2 markets.

**Supporting Projects:**

- Expand and package the range of accessible reef (diving/snorkelling/nature) experiences from Gladstone and the Discovery Coast, positioning the Region as the ideal destination to access and enjoy the Southern Great Barrier Reef.
- Reinvigorate the Region’s fishing product via improved packaging of the Fishing product and experiences, supporting product and infrastructure development - driving awareness of the fishing offer through targeted marketing including online and social media, and investigate the creation of new fishing events.
- Seek funding and partner support to establish a major new signature industrial tourism experience, as the focus for showcasing the Region’s powerhouse economy.
- Develop accessible and compelling coastal and adventure experiences which position the Discovery Coast as the first choice location to enjoy the laid back Queensland beach lifestyle - building a niche and reputation as a hub for alternative/healthy lifestyle experiences.

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>PARTNERS</th>
<th>TIMING</th>
<th>MARKET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support the ongoing development of access and experiences to deliver the potential of Lady Musgrave Island, including; development of new marina facilities and capacity, increased access options via helicopter and new boat capacity, and capacity at the Island (pontoon).</td>
<td>Industry: DCTC, Council</td>
<td>Ongoing</td>
<td>Niche Leisure</td>
</tr>
<tr>
<td>Review the Region’s hero experiences to identify gaps in the product and experience offer, as the basis for future planning and investment, and identify products that can deliver the hero experiences in Tier 1 &amp; 2 markets.</td>
<td>GAPDL, DCTC, TEQ</td>
<td>Years 1 and 2</td>
<td>All</td>
</tr>
<tr>
<td>Develop and implement a program which establishes health and wellbeing as an integral element of Discovery Coast’s positioning and offer to visitors including;</td>
<td>DCTC, GRC, Industry GAPDL</td>
<td>Years 1 and 2</td>
<td>Niche Leisure</td>
</tr>
<tr>
<td>- Encouraging clustering of health and wellbeing experiences (within existing businesses and via new businesses)</td>
<td></td>
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<tr>
<td>- Integration of the health and wellbeing positioning into marketing</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>- Supported by precinct development including infrastructure investment in high quality town landscaping, trail development, public art etc.</td>
<td>GAPDL, Councils, DCTC</td>
<td>Years 1 and 2</td>
<td>Fishing</td>
</tr>
</tbody>
</table>
Establish a Regional Fishing Cluster Group, tasked with reinvigorating the coastal and inland fishing experiences – incorporating;

- Packaging of the offer with accommodation options;
- Promotion of operator opportunities – re fishing supplies;
- Access/charter options for sea fishing;
- Packaging to incorporate a range of fishing options – fresh water, sea, expert and casual anglers;
- Supporting infrastructure – boat ramps, fish cleaning tables
- Opportunities to engage commercial partners/retailers; and
- Augmenting the experience with new fishing events as annual focuses for activity.

Establish new access, touring and nature experience options to the islands and reefs from Gladstone and Discovery Coast and investigate options for a cluster of dive and snorkelling experiences.

- Promote product development opportunities to industry and new investors i.e. tours, boat charter, fishing charters, quad bike hire etc.

Examine opportunities to promote the uniqueness of South End and Facing Island i.e. easy access by barge, camping, turtles, long beaches, fishing etc.

Continue to work with industry partners to investigate the feasibility of a new signature experience which showcases the Region’s industrial tourism – opportunities include tours, viewing points, and the proposed Gladstone Regional Industry Interpretation Centre.

Utilise events, trails (short drive routes/walking/cycling), cultural heritage, nature and art to create unique experiences in the Region’s towns and cities i.e. Banana Shire’s proposed public art trail, linkages to indigenous sites.

<table>
<thead>
<tr>
<th>MARKETING</th>
<th>PARTNERS</th>
<th>TIMING</th>
<th>MARKET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incorporate the story of the Region’s resources and agribusiness sectors into regional marketing, including business tourism marketing - building the broader appeal of SGBR visitor experiences.</td>
<td>GAPDL</td>
<td>Years 1 and 2</td>
<td>VFR Business</td>
</tr>
<tr>
<td>Utilise billboards and town entry signing to build unique town identities, including Bruce Highway</td>
<td>GAPDL, Councils, DCTC</td>
<td>Years 1 and 2</td>
<td>All</td>
</tr>
</tbody>
</table>
3. Targeting a Balanced Portfolio of Markets

Informed by a thorough understanding of visitor markets and consumer trends, we will target a balanced portfolio of markets that match our competitive strengths and deliver the best results for our destinations.

**Vision:**
*Grow the year-around tourism season in VFR, niche leisure, and holiday markets, and establish the region as a key player in Queensland’s Meetings/Incentives/Conferences/Exhibitions (MICE) sector.*

**Priority Project:** Establish the Region as a recognised destination in the MICE market, creating a co-ordinated and compelling regional offer alongside GECC as the principal large scale events venue, including pre/post leisure extensions.

**Supporting Projects:**
- Establish and implement a marketing plan for the Region (for all partners) which identifies target markets and rationalises collective resources and responsibilities against those targets.
- Grow interstate international markets (starting with long-haul western) via the SGBR partnership, incorporating investigation of international youth market opportunities.
- Develop and implement a regional events program building on unique regional experiences- including regional events calendar, identifying new events to fill gaps in the calendar.
- Grow Gladstone’s role as an entertainment hub, incorporating a strong events program and improved food and drink, retail and breadth of accommodation offers.
- Via establishing a drive market strategy, review marketing, packaging and products which target the long haul drive market, including options to develop at least one major new themed driving route.

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>PARTNERS</th>
<th>TIMING</th>
<th>MARKET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participation in ongoing SGBR consumer campaign activity, leveraging SGBR through all channels and partnerships’.</td>
<td>GAPDL SGBR RTO partners TEQ</td>
<td>Ongoing</td>
<td>All</td>
</tr>
<tr>
<td>Development of a new packaged offer for the MICE sector, based around the GECC as the principal large-scale venue, incorporating clear positioning and packaging with accommodation, touring and activity offerings.</td>
<td>GAPDL GECC Industry</td>
<td>Years 1 and 2</td>
<td>Business Events</td>
</tr>
<tr>
<td>Establish a new Regional Business Tourism Partnership as the vehicle to co-ordinate tourism investment and delivery.</td>
<td>GAPDL GECC Councils CoC DCTC Industry</td>
<td>Year 1</td>
<td>All</td>
</tr>
<tr>
<td>Review opportunities for collaboration with Discovery Coast businesses on maximising the impact (including generation of overnight stays) of Asian visitors currently visiting the destination</td>
<td>DCTC Industry GAPDL</td>
<td>Years 1 and 2</td>
<td>Leisure Marine niche</td>
</tr>
<tr>
<td>Establish a strong year/around events calendar, building on the Region’s unique attributes. Consider opportunities to develop or acquire new events (which fit with the hero experiences) as a means of incentivising visits and growing profile.</td>
<td>GAPDL Councils DCTC Arts QLD</td>
<td>Years 1 and 2</td>
<td>Events</td>
</tr>
</tbody>
</table>
Consider establishing a sporting cluster group that promotes facilities and linkages for target events in the Region i.e. golf, swimming events, triathlons, cycling.

<table>
<thead>
<tr>
<th><strong>Councils</strong> GAPDL</th>
<th><strong>Year</strong> 2</th>
<th><strong>Events</strong></th>
</tr>
</thead>
</table>

Work with Council and operators on wedding venue licencing in order to help position Discovery Coast as a leading wedding destination.

<table>
<thead>
<tr>
<th><strong>Council</strong> DCTC</th>
<th><strong>Years</strong> 1 and 2</th>
<th><strong>Events</strong></th>
</tr>
</thead>
</table>

Grow the numbers of international-ready businesses via trade mentoring and support programs.

<table>
<thead>
<tr>
<th>GAPDL Industry</th>
<th><strong>Years</strong> 1 and 2</th>
<th><strong>Business</strong></th>
</tr>
</thead>
</table>

Establish a Drive Strategy which builds the case for better signage, road upgrades, development of touring routes (including SGBR area) and maps in the region to grow this important market.

<table>
<thead>
<tr>
<th>GAPDL Councils DCTC TEQ RACQ</th>
<th><strong>Year</strong> 3</th>
<th><strong>VFR</strong></th>
</tr>
</thead>
</table>

Investigate the opportunity to augment existing routes including Australia’s Country Way and the Leichhardt Highway with a new themed driving route in the region. The route will need to incorporate:
- A clear approach to managing RV/ camping, building in the agreed approach to unmanaged free camping;
- Signing of the route;
- Accommodation options; and
- Activity options.

<table>
<thead>
<tr>
<th>Industry GAPDL</th>
<th><strong>Year</strong> 3</th>
<th><strong>All</strong></th>
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</thead>
</table>

Invest in backpacker related infrastructure and experiences across the SGBR area to ensure that the Gladstone region retains and expands its share of the youth market, including extending visas by working in a rural region and working holidays.

<table>
<thead>
<tr>
<th>Industry GAPDL</th>
<th><strong>Year</strong> 3</th>
<th><strong>All</strong></th>
</tr>
</thead>
</table>

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**MARKETING**

Work with Councils, industry and TEQ to refresh the image gallery for the Region, reflecting Gladstone as well as coastal, island and reef imagery.

<table>
<thead>
<tr>
<th>GAPDL TEQ Councils DCTC Industry</th>
<th><strong>ongoing</strong></th>
<th><strong>All</strong></th>
</tr>
</thead>
</table>

Build effective partnership and communication to ensure that the opportunities provided by the existing events program are fully maximised— including key events such as the Gladstone to Brisbane Yacht Race
- Ensure event information is channelled on to the ATDW, as a means of ensuring the program is distributed as widely as possible.

<table>
<thead>
<tr>
<th>GAPDL Councils DCTC Industry</th>
<th><strong>ongoing</strong></th>
<th><strong>Events</strong></th>
</tr>
</thead>
</table>

Embrace a strategic approach to marketing of the Region to maximise investment, incorporating;
- Development of a regional marketing plan, engaging key public and private sector partners to set out a strategic basis for marketing intervention and guidelines for application of a brand hierarchy against target markets;
- Integrate tourism marketing within the overall approach to marketing and promotion of the region, setting out a clear messaging approach;
- Incorporate a digital first approach, seeking to initiate/implement new developments via digital channels, with rich content; and
- Embed the Southern GBR brand.

<table>
<thead>
<tr>
<th>GAPDL TEQ GRC DCTC</th>
<th><strong>Years</strong> 1 and 2</th>
<th><strong>All</strong></th>
</tr>
</thead>
</table>
Work with Arts Queensland to explore potential opportunities to develop links between tourism partners and events and the arts community – specifically, seeking to work with Arts QLD on establishing a ‘connector’ event in the region.  

<table>
<thead>
<tr>
<th>GAPDL Arts QLD</th>
<th>Years 1 and 2</th>
<th>Events</th>
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</thead>
</table>

Establish a marketing program, incorporating tailored and unique local itineraries to establish the Region in the MICE sector – targeting identified MICE sectors, PCOs, and leveraging off demand from locally based businesses.  

<table>
<thead>
<tr>
<th>GAPDL GECC DTC</th>
<th>Years 1 and 2</th>
<th>Business Events</th>
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</thead>
</table>

Marketing to target increased expenditure from business visitors, including opportunities to create pre/post touring packages.  

<table>
<thead>
<tr>
<th>GAPDL Industry</th>
<th>Years 1 and 2</th>
<th>Business Leisure</th>
</tr>
</thead>
</table>

Consider the opportunities available via targeting the attraction/acquisition of landmark business events to position Gladstone as a major new player in the marketplace.  

<table>
<thead>
<tr>
<th>GAPDL GECC GRC</th>
<th>Years 1 and 2</th>
<th>Business Events</th>
</tr>
</thead>
</table>

Continue to target the short-break and long-haul drive markets – continuing core markets for the Region.  

- Focus the drive market messages around the coastal lifestyle and adventure/experiences, and build awareness of the range of experiences.  

<table>
<thead>
<tr>
<th>TEQ GAPDL</th>
<th>Years 1 and 2</th>
<th>VFR</th>
</tr>
</thead>
</table>

Collaborative marketing with SGBR partners in international and target interstate markets – for overseas markets supported by a program to build industry international-readiness.  

Target SGBR’s overseas youth market - linked to employment opportunities across Banana Shire Council and Gladstone Regional Council areas. Investigate the potential of voluntourism as part of the Region’s positioning;  

- With Councils, investigate the potential of establishing a sister city program, and leverage the potential of tourism market links.  

<table>
<thead>
<tr>
<th>SGBR Partners Youth/Backpacker sector Councils</th>
<th>Year 2</th>
<th>All</th>
</tr>
</thead>
</table>

Investigate opportunities to develop weekend fly-drive packages for the destination, taking advantage of Gladstone’s regular services.  

- Work with domestic wholesale and retail partners to build industry confidence in distribution and commission arrangements  
- Build numbers of trade-ready regional businesses able to provide an allocation for bookings, as a key enabler.  

<table>
<thead>
<tr>
<th>TEQ GAPDL Industry</th>
<th>Years 4 and 5</th>
<th>Leisure</th>
</tr>
</thead>
</table>
4. Delivering Quality, Great Service and Innovation

We will deliver authentic, high quality Queensland experiences, led by career-oriented and passionate professionals, and through our operators adopting innovative technologically smart solutions to reaching customers.

**Vision:** Gaining a competitive edge by establishing quality of service and experience delivery at the Heart of the Region’s offer to visitors.

**Priority Project:** Establish and implement a ‘know our backyard’ program aimed at residents, businesses and schools, as a means of growing awareness and civic pride and supporting investment in public facilities;

**Supporting Projects:**
- Co-ordinated/master-planned development of Gladstone’s entertainment offer.
- Experience development program.
- Workforce development project.

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>PARTNERS</th>
<th>TIMING</th>
<th>MARKET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development of a thriving Gladstone entertainment offer – building an events program and enhanced retail, food and drink and accommodation options. Ensure strategic tourism input into planning process.</td>
<td>GAPDL GECC Council Industry</td>
<td>Ongoing</td>
<td>Events and VFR</td>
</tr>
<tr>
<td>Commit to developing and implementing a ‘know our backyard’ tourism program aimed at residents, businesses and schools, as a means of growing awareness and civic pride and supporting investment in public facilities;</td>
<td>GAPDL Local business and tourism groups</td>
<td>Years 1 and 2</td>
<td>Locals and VFR</td>
</tr>
<tr>
<td>• Each sub-region to develop a local’s campaign to raise awareness of the ten best things to do in their area with friends and relatives in each season and encourage every local to invite their friends to come and stay and with tourism operators offer incentive packages (locals visit for free, etc.).</td>
<td></td>
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</tr>
<tr>
<td>Promote the tourism and hospitality sector as a career opportunity, including targeting family members of those working in the mining and energy sectors.</td>
<td>GAPDL Councils Industry</td>
<td>Years 1 and 2</td>
<td>VFR</td>
</tr>
<tr>
<td>Work in partnership with QTIC to improve the competitiveness of tourism industry by advocating for workplace relations reform that recognises the tourism industry is a 7 days a week, 24 hours a day industry. Consider locations within Gladstone region, as key tourism precincts and allow for more flexible and competitive workplace employment agreements.</td>
<td>QTIC GAPDL Industry</td>
<td>Years 1 and 2</td>
<td>All</td>
</tr>
<tr>
<td>Work with QTIC to establish and deliver a skills and training program which meets long term workforce and business needs, and addressing identified skills gaps.</td>
<td>QTIC GAPDL Councils</td>
<td>Years 1 and 2</td>
<td>All</td>
</tr>
<tr>
<td>Embed the Region’s hero experiences with council and business partners via a regional experience development program. Identify ‘beacon’ tourism businesses to act as ambassadors for the program.</td>
<td>GAPDL TEQ</td>
<td>Years 1 and 2</td>
<td>All</td>
</tr>
<tr>
<td>Seek award recognition for key tourism destinations and hubs in ‘Tidy Towns’ programs</td>
<td><strong>Councils</strong>&lt;br&gt;Residents&lt;br&gt;Industry</td>
<td>Year 3</td>
<td>All</td>
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<tr>
<td>Work to secure funding and develop the Gladstone Regional Industry Interpretation Centre as the hub for embedding the Region’s story as a powerhouse for resources, energy and agribusiness.</td>
<td><strong>GAPDL</strong></td>
<td>Years 4 and 5</td>
<td>Niche Leisure</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>MARKETING</strong></th>
<th><strong>PARTNERS</strong></th>
<th><strong>TIMING</strong></th>
<th><strong>MARKET</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Utilise the new mobile ‘i’ information service to support and add value to key market growth opportunities for the region, including key business and leisure events, and VFR/resident orientated initiatives.</td>
<td><strong>GAPDL</strong></td>
<td>Ongoing</td>
<td>All</td>
</tr>
<tr>
<td>Work with Gladstone accommodation operators to investigate the potential of leisure break packages at weekends – linking with GECC and events program.</td>
<td><strong>GAPDL Operators</strong></td>
<td>Years 1 and 2</td>
<td>Niche Leisure Events</td>
</tr>
</tbody>
</table>
5. Building Strong Partnerships

Strong tourism leadership will drive effective partnerships between government, communities and industries. Strong partnerships will deliver a long term vision which recognises the industry’s benefits to Queenslanders and supports tourism growth.

Vision: Establish cohesive and effective partnerships and communications mechanisms between local, regional and State partners which actively support and contribute to achievement of the Region’s 2020 growth targets.

Priority Project: Form a new Gladstone Regional Tourism Alliance (GRTA) as the key co-ordination point for the region’s tourism industry – owning delivery and monitoring of the destination tourism plan and guiding communication with industry partners.

Supporting projects:
- Formalisation of MOUs between GAPDL and key local partners, including Councils and local tourism partners where appropriate.
- Formalise the roles and responsibilities of partners in the SGBR Alliance/Partnership.
- Across key delivery partners, review and realign resources against delivery of DTP objectives and growth priorities.
- Resilience program, building tourism business readiness to manage the impact of economic shocks and natural emergencies.

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<thead>
<tr>
<th>PRODUCT</th>
<th>PARTNERS</th>
<th>TIMING</th>
<th>MARKET</th>
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<tbody>
<tr>
<td>PR and social media program targeting local and regional press and media to build a positive profile and talk up tourism as a leading part of the regional economy – built around unique local stories, business successes and key events.</td>
<td>GRTA GAPDL Industry</td>
<td>Ongoing</td>
<td>All</td>
</tr>
<tr>
<td>New partnership structure established – strategic leadership from the Gladstone Regional Tourism Alliance (GRTA).</td>
<td>GRTA GAPDL Councils DCTC Industry</td>
<td>Year 1</td>
<td>All</td>
</tr>
<tr>
<td>Forge stronger partnerships with delivery partners for identified priority DTP and Tourism Opportunity Plan projects via establishing project groups for each of the priority projects, including business tourism.</td>
<td>GAPDL Councils Operators</td>
<td>Years 1 and 2</td>
<td>All</td>
</tr>
<tr>
<td>Build on existing links with key resources, mining and agribusiness business partners, explore the potential of developing industrial tourism experiences.</td>
<td>GAPDL</td>
<td>Years 1 and 2</td>
<td>Niche Leisure</td>
</tr>
<tr>
<td>Develop tourism industry readiness for managing the impact of economic shocks and natural emergency events by integrating industry responsiveness into existing resilience programs. A particular emphasis for tourism businesses should be PR/social-media response readiness.</td>
<td>GAPDL Councils</td>
<td>Years 1 and 2</td>
<td>All</td>
</tr>
<tr>
<td><strong>MARKETING</strong></td>
<td><strong>PARTNERS</strong></td>
<td><strong>TIMING</strong></td>
<td><strong>MARKET</strong></td>
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</tr>
<tr>
<td>Continue to lead and drive forward the SBGR partnership with RTO partners and TEQ.</td>
<td>GAPDL BNBT CE TEQ</td>
<td>Ongoing</td>
<td>All</td>
</tr>
<tr>
<td>Partner support program to raise awareness of the importance of developing the volume of region-wide content on ATDW as a means of growing online presence</td>
<td>GAPDL DCTC Industry</td>
<td>Ongoing</td>
<td>All</td>
</tr>
<tr>
<td>Co-ordinated PR and media program to raise awareness of tourism’s contributions to quality of life for local communities.</td>
<td>GRTA GAPDL</td>
<td>Ongoing</td>
<td>All</td>
</tr>
<tr>
<td>Co-ordinated communication with industry - providing consistent messaging, talking up tourism and building belief and pride in the region.</td>
<td>GAPDL</td>
<td>Years 1 and 2</td>
<td>All</td>
</tr>
<tr>
<td>Work with residents, industry and relevant agencies to resolve the issue re naming of the Town of 1770 to ensure confusion for visitors is minimised.</td>
<td>GRC DCTC GAPDL</td>
<td>Years 1 and 2</td>
<td>All</td>
</tr>
<tr>
<td>Co-ordinated PR and media program to grow positive profile for the Region in regional, local and State press and media.</td>
<td>GAPDL Councils DCTC</td>
<td>Years 1-2</td>
<td>All</td>
</tr>
<tr>
<td>Evidence-based and co-ordinated lobbying on key infrastructure requirements (access, roads infrastructure, public transport, town centre planning and development) to deliver tourism growth objectives.</td>
<td>GAPDL Councils DCTC Industry</td>
<td>Years 1-2</td>
<td>All</td>
</tr>
<tr>
<td>Investigate high profile media opportunities – i.e. National Geographic documentary etc. to showcase positive stories about the Region with local audiences and key stakeholders.</td>
<td>GAPDL</td>
<td>Years 4 and 5</td>
<td>All</td>
</tr>
</tbody>
</table>
6. Growing Investment and Access

**Vision:** Targeted investment in tourism facilities and supporting infrastructure removes the barriers to tourism growth and enables operators to deliver experiences which meet visitor expectations.

**Priority Project:** Support the development of improved access to the Region’s key National Parks (Kroombit Tops, Deep Water and Eurimbula) and the range of adventure experiences available to visitors.

**Supporting projects:**

- Development of a regional tourism investment prospectus – identifying key investment opportunities relating to the Region’s hero experiences.
- Seek funding for development of the Gladstone Region Industry Interpretative Centre and development of a new signature industrial tourism experience.
- Promote opportunities to develop an increased range of options for visitors to access and enjoy reef/diving/snorkelling/bushwalking/rural work experiences.
- Support development of the Curtis Island South End Small Craft Facility Project to deliver a safe all weather, all tide small craft facility constructed adjacent to the existing caisson.
- Continued partnership with Gladstone Airport and airlines to maintain and develop the current route network.
- Investigate the potential for development of a marina at the Boyne River Mouth and associated river dredging to support building of a yacht cluster and a critical mass of marine infrastructure in the region.
- Prioritise and support development of flood-proofing on key routes including access routes to Agnes Water/ Town of 1770, and Burnett, Dawson & Leichardt Highways in Banana Shire.
- Masterplan development for Agnes Water and Town of 1770, incorporated support for improvements to access, precinct development, and enhanced marina capacity/facilities.
- Establish one major new fully signposted and packaged tourism drive route in the Region, linking Gladstone and the Discovery Coast.
- Development of a network of niche trails which focuses on the unique attributes, culture and history of the region.

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<thead>
<tr>
<th>PRODUCT</th>
<th>PARTNERS</th>
<th>TIMING</th>
<th>MARKET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support major investments by the private sector which develop new product and refresh existing assets, including:</td>
<td>GAPDL Councils DCTC</td>
<td>Ongoing</td>
<td>All</td>
</tr>
<tr>
<td>• Development of access and experiences to deliver the potential of Lady Musgrave Island;</td>
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<tr>
<td>• Ongoing investment in establishing the GECC;</td>
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<tr>
<td>• Investment in growing Gladstone’s retail and entertainment offer;</td>
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<tr>
<td>• New 4 and 5 star accommodation development in Gladstone and Discovery Coast; and</td>
<td></td>
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<tr>
<td>• Investment in youth and adventure product across the region.</td>
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</table>

Seek and secure funding for major public works for tourism oriented projects that have a broader community benefit, including:

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<tr>
<th>PRODUCT</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>GAPDL Councils</td>
<td>Ongoing</td>
<td>All</td>
</tr>
</tbody>
</table>
- Masterplan development for Agnes Water and Town of 1770, to guide the future planning scheme zoning and incorporating support for improvements to access, precinct development, and enhanced marina capacity/facilities;
- Flood-proofing of key intra-region access routes, in particular key access routes to Agnes Water/Town of 1770 (including development of a mitigation strategy during flooding for safe parking – Miriam Vale site);
- Ongoing Gladstone CBD revitalisation; and
- Gladstone Regional Industry Interpretation Centre.

Continue to invest in public amenities i.e. toilets, dump sites and signposting in key tourism hubs. | Councils, GAPDL | Ongoing | All
---|---|---|---
Support the ongoing development and promotion of Heron Island Resort, Lady Musgrave Island and other key reefs and islands. | GAPDL Industry | Ongoing |
Work with Government, TEQ and operators to find practical solutions to the red tape challenge, including:
- Regulatory barriers to developing industrial tourism experiences
- Reviewing the impact of GRC’s pedestal tax. | QTIC GAPDL Queensland Government Councils Operators | Ongoing | Niche Leisure
Work with potential investors to investigate the feasibility of opportunities to develop an increased range of options for visitors to access and enjoy reef/diving/snorkelling/bushwalking/rural work experiences.
Examine opportunities within the context of the SGBR partnership for new dive and snorkelling trails, clusters, packaging, events and infrastructure. | GAPDL DCTC Industry | Ongoing | Niche Leisure
Contribute to the review of Gladstone Regional Council planning schemes for key tourism destinations to establish frameworks that are pro-tourism re-provision of public amenities including parking, signposting, public amenities, etc. | Councils | Ongoing | All
Work with Council and operators to undertake reviews of planning requirements to ensure that planning schemes encourage the expansion/development of 4-5 star accommodation to develop the leisure and entertainment appeal of Gladstone – including expansion/development of stock to include 4-5 star accommodation experiences, and improved food and drink, retail and entertainment offers. | GRC CoC Industry GAPDL | Ongoing |
Support the development and maintenance of aviation services, working in close partnership with Gladstone Airport and airlines. | GAPDL Airport Industry | Ongoing | All
Investigate the opportunity to establish a new visitor attraction based around the concept of ‘big boys toys’ – providing an interactive experience for visitors linked to mega mining and agriculture vehicles, motorised activity pursuits etc. | GAPDL Industry Councils | Years 1 and 2 | VFR Niche Leisure
As an enabler for delivering the potential of the internal youth market, invest in backpacker related infrastructure and experiences in the SGBR are to ensure that the Region retains and expands its share of the youth market, including extending visas by working in a rural region and working holidays. | Operators | Years 2 And 3 | All
Investigate the potential of the Capricorn Bunker group of islands (including North West and Masthead) in terms of marketing and development potential.  

<table>
<thead>
<tr>
<th>GAPDL Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>QWPS</td>
</tr>
<tr>
<td><strong>Year 3</strong></td>
</tr>
</tbody>
</table>

Council-led development of a series of niche trails throughout the Region – telling the story of the Region, showcasing unique cultural, arts and heritage stories.

<table>
<thead>
<tr>
<th>Councils Arts QLD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Year 3</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Niche Leisure</th>
</tr>
</thead>
</table>

Investigate the potential for development of a marina at the Boyne River Mouth and associated river dredging to support building of a yacht cluster and a critical mass of marine infrastructure in the region.

<table>
<thead>
<tr>
<th>GRC GAPDL Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>GPC</td>
</tr>
<tr>
<td><strong>Year 3</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Niche Leisure</th>
</tr>
</thead>
</table>

Support the priority to ensure a flood proof access route is developed for Agnes Water/Town of 1770. In the intervening period, work with the statutory authorities to mitigation plans in place for alternative access arrangements.

<table>
<thead>
<tr>
<th>GRC DTMR DCTC</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Years 4 and 5</strong></td>
</tr>
</tbody>
</table>

| All |

Support development of the Curtis Island South End Small Craft Facility Project to deliver a safe all weather, all tide small craft facility constructed adjacent to the existing caisson to improve public safety, tourist access and general liveability of the South End settlement.

<table>
<thead>
<tr>
<th>LNG industry, GPC, QLD Govt., Community</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Years 4 and 5</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>VFR Leisure</th>
</tr>
</thead>
</table>

**MARKETING**

- Development of a regional tourism investment prospectus, linked to overall economic development and lifestyle marketing of the region – identifying key investment opportunities relating to the Region’s hero experiences.
  - Support prospectus with a proactive and tourism-friendly approach to development

<table>
<thead>
<tr>
<th>GAPDL Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>QPWS</td>
</tr>
<tr>
<td><strong>Years 1 and 2</strong></td>
</tr>
</tbody>
</table>

| All |

Gladstone Region Destination Tourism Plan 2014-2020
Southern GBR Strategies

The following strategies have been targeted for the Gladstone region to maximise the opportunities provided by utilising SGBR branding to lead and support marketing investment in target markets.

**Vision:** Maximise the potential and growing market recognition and awareness of SGBR branding in identified target markets, establishing Gladstone region at the centre of Southern Great Barrier Reef.

**Priority Project:** Promote opportunities to encourage operators to establish new and improved access opportunities, enabling visitors to enjoy island and reef experiences.

**Supporting projects:**
- Develop opportunities to establish Gladstone region at the centre of the Southern Great Barrier Reef, as part of Queensland’s positioning as the international destination of choice for youth self-changers - increasing expenditure and market share of the youth sector.

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>PARTNERS</th>
<th>TIMING</th>
<th>MARKET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Encourage and support the development of new and improved product and events – such as Lady Musgrave Island, beach walks and flora/fauna trails, snorkel/dive/swim opportunities, cruises and tours.</td>
<td>SGBR Partners QPWS Industry</td>
<td>Years 1 and 2</td>
<td>Niche Leisure</td>
</tr>
<tr>
<td>Engage with industry to better understand current provision for the youth sector in the Region as the basis for informing the Region’s position/opportunities for targeting the international youth market.</td>
<td>SGBR Partners GAPDL TEQ</td>
<td>Years 1 and 2</td>
<td>International/Leisure</td>
</tr>
<tr>
<td>Work with partner SGBR RTO partners to implement a clear and equitable policy stance for businesses on issues relating to membership, marketing and support services, particularly relating to businesses located close to RTO border areas.</td>
<td>GAPDL SGBR RTOs</td>
<td>Years 4 and 5</td>
<td>All</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MARKETING</th>
<th>PARTNERS</th>
<th>TIMING</th>
<th>MARKET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continue to lead, encourage, invest in, and support the SGBR marketing alliance, and ensure the Gladstone region Experiences and gateway position are to the fore.</td>
<td>SGBR Partners</td>
<td>Ongoing</td>
<td>All</td>
</tr>
<tr>
<td>Grow operator and Council awareness of the Southern Great Barrier Reef branding and partnership, working with TEQ to develop understanding of the economic benefits of using the brand to promote the Region in target markets, and the scale of State support and collateral behind SGBR’s position within overall marketing of Queensland</td>
<td>GAPDL TEQ</td>
<td>Ongoing</td>
<td>All</td>
</tr>
<tr>
<td>Within an overall marketing plan for the Region, integrate SGBR messaging across appropriate GAPDL channels</td>
<td>GAPDL</td>
<td>Ongoing</td>
<td>All</td>
</tr>
<tr>
<td>Grow financial commitment to the SGBR partnership, seeking a substantial increase in resources to establish the brand and the Gladstone region experiences in the marketplace</td>
<td>SGBR partners</td>
<td>Ongoing</td>
<td>All</td>
</tr>
<tr>
<td>Grow operator and Council support for, and buy-in to the Southern Great Barrier Reef partnership, working with TEQ to encourage stand-alone cooperative marketing and participations in campaigns.</td>
<td>TEQ SGBR partners Industry</td>
<td>Ongoing</td>
<td>International/Leisure</td>
</tr>
<tr>
<td>Use in-market partnerships to promote SGBR and Regional experiences in international and interstate markets via PR/social media.</td>
<td>GAPDL SGBR partners</td>
<td>Ongoing</td>
<td>International/Leisure</td>
</tr>
</tbody>
</table>
APPENDICES
Appendix 1: Southern Great Barrier Reef Partnership

The Southern Great Barrier Reef (SGBR) region incorporates the Gladstone, Capricorn and Bundaberg tourism regions. The aim of this partnership is to collectively market the region according to its competitive advantages and create products and infrastructure that reflect this.

Visitation

Last year (YE June 2013), SGBR received 1,711,000 domestic overnight visitors and 132,000 International overnight visitors. This represents a 1% increase in domestic visitors and a 5% decrease in International visitors since 2010.

Visitor Origins

Domestic visitors primarily come from regional Queensland or Brisbane (Table A) while the majority of international visitors come from Europe (UK and Germany) and New Zealand.

<table>
<thead>
<tr>
<th>Total Visitors</th>
<th>Domestic</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional QLD</td>
<td>1,084,000</td>
<td></td>
</tr>
<tr>
<td>Brisbane</td>
<td>364,000</td>
<td></td>
</tr>
<tr>
<td>Regional NSW</td>
<td>79,000</td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>25,000</td>
<td></td>
</tr>
<tr>
<td>New Zealand</td>
<td>19,000</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>16,000</td>
<td></td>
</tr>
</tbody>
</table>

Purpose of Visit

The primary purpose of visit for domestic overnight visitors is having a holiday (35%) closely followed by visiting friends and relatives (36%). Similarly, for International overnight visitors the primary purpose of visit is for a holiday (76%) and the next most common purpose for visiting the SGBR is to visit friends and relatives (14%).

Youth Market

International visitor statistics indicate that in 2013, 51.2% of visitors were aged between 15 and 29. The majority of these international visitors come from Europe as seen in table 4.

<table>
<thead>
<tr>
<th>Country</th>
<th>Total visitors</th>
<th>Youth share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Euro- UK+DE</td>
<td>54,000</td>
<td>64.45%</td>
</tr>
<tr>
<td>France</td>
<td>7,000</td>
<td>80.6%</td>
</tr>
<tr>
<td>Germany</td>
<td>16,000</td>
<td>71.5%</td>
</tr>
<tr>
<td>UK</td>
<td>25,000</td>
<td>62.7%</td>
</tr>
</tbody>
</table>

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11 SGBR regional snapshot June 2013 from TEQ

12 SGBR Youth Strategy Update 2013
Appendix 2: Southern Great Barrier Reef Opportunities and Challenges

Opportunities
The marketing and positioning of the Southern Great Barrier Reef is beginning to deliver results. To continue to drive results and position the region as a primary gateway to the Great Barrier Reef more marketing funds are needed. These could build on the great results to date that show a movement in perception of where the best place in Queensland is to experience nature-related activities:

• In 2012, 1% of Queenslanders nominated Bundaberg as the best place in Queensland to experience the Great Barrier Reef, 2% Gladstone region, 2% Capricorn and 45% Tropical North Queensland (TNQ). In 2013, 31% of Queenslanders nominated the Southern Great Barrier Reef as the best place in Queensland to experience the Great Barrier Reef and 28% TNQ.
• In 2012, 2% of Queenslanders nominated Bundaberg as the best place in Queensland to experience awe-inspiring natural wonders, 2% Gladstone region, 3% Capricorn and 36% TNQ. In 2013, 17% of Queenslanders nominated the Southern Great Barrier Reef as the best place in Queensland to experience awe-inspiring natural wonders.
• In 2012, 2% of Queenslanders nominated Bundaberg as the best place in Queensland to experience Natural World Heritage sites, 2% Gladstone region, 5% Capricorn and 39% TNQ.
• In 2013, 14% of Queenslanders nominated the Southern Great Barrier Reef as the best place in Queensland to experience Natural World Heritage sites

New and enhanced product development is needed in the Gladstone region to deliver the brand and hero experiences of the Southern GBR. This should include new snorkelling and dive experiences (preferably walk off the beach experiences), new remote island camping opportunities and new sailing and ‘choose your our adventure’ style activities.

Challenges
• The Southern GBR will remain a seasonal destination, building on the marine encounters year-round will be vital to creating a viable experience for the growing international markets. This needs to start by growing the ‘shoulder-seasons’
• Air and marine access, including public transport between the airport and islands, will constrain growth and the perception of the destination as a GBR gateway.
• Building community support for tourism, and in particular getting behind the Southern GBR brand needs to be a priority.
• More Southern GBR product needs to be domestic, and preferably international, market ready. This will take more one-on-one mentoring for identified businesses.