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Executive Summary

The Queensland Government has identified the tourism industry as one of four key pillars that will drive economic development and growth in the coming decade, and has set a goal to increase visitor expenditure across Queensland from $21.5 billion in 2012 to $30 billion by the year 2020.

All tourism regions will contribute to achieving this goal and have been set milestones to aim for in raising their annual visitor expenditure. In the case of the Whitsundays region the aim is to raise expenditure from $705 million in 2012-2013 to $1.24 billion in 2019-2020.

This Whitsundays Destination Tourism Plan (DTP) seeks to guide the industry in reaching this aspirational target, in growing sustainability and in achieving its vision that, ‘by 2020 the Whitsundays will be globally recognised as one of the world’s leading tropical island and marine leisure holiday destinations’

In being aware of numerous megatrends that will impact of the industry in the coming decade state government has identified six key themes upon which tourism development should be based, namely;

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

Research to develop this DTP included desktop review of existing key plans and strategies; review of extensive local industry and stakeholder 2013 consultation (Airlie Beach, Bowen, Collinsville and Proserpine 2013 tourism forums results); industry focus group and steering committee workshops; and individual key business and government stakeholder consultation undertaken in early 2014.

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

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

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

The top opportunities and challenges the region faces in achieving the 2020 growth in annual visitor expenditure are identified as;

**Top Opportunities**
1. Regional population growth
2. Optimise the regions marketing outcomes
3. Product and facilities development
4. Events development
5. Developing drive tourism
6. International access potential of Whitsunday Coast Airport

**Top Challenges**
1. Threats to and decline in the marine and natural environment
2. High cost of doing business in Australia
3. Impacts of severe weather events
4. Lack of mainland product and activities
5. Attracting, developing and retaining a skilled workforce
The region’s stakeholders recognise that they can’t keep going as they have been, if they are to achieve a 70% growth in annual visitor expenditure over the next 6 years. There will be an ongoing marketing effort to grow traditional and emerging markets and some island resorts and mainland businesses are undertaking significant refurbishments and rebranding to attract new high-yield markets; it is recognised that there is a strong need for increased mainland product and infrastructure that caters to families, the drive market and provides bad weather alternatives (this will also support efforts to substantially grow the resident population).

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

The DTP identifies twelve key strategies for the region to focus on to achieve 2020 targets:

1) Take advantage of population growth in the immediate and greater region (Galilee and Bowen basins, Townsville) by maximising opportunities to grow day-trip, short-break and VFR visitation to the Whitsunday region;

2) Refocus regional marketing initiatives to improve performance/attract more visitors from southern, interstate and eastern seaboard markets, in particular Melbourne, Sydney and N.Z. markets;

3) Grow consumer recognition that the Whitsundays is the gateway to the central Great Barrier Reef (heart of the reef);

4) Increase the attractiveness of the Whitsundays as an Australian holiday destination to Chinese target markets;

5) Support the development of major projects that will enhance the visitor experience and appeal of the region;

6) Support the development of new product and experiences that encourage distribution of visitors and tourist dollars throughout the region;

7) Grow the number and quality of events across the Whitsundays region;

8) Protect and promote Whitsundays marine and natural environments;

9) Support tourism industry workforce development;

10) Improve industry resilience to the impacts of severe weather events;

11) Establishment of international flights into Whitsunday Coast Airport; and

12) Increase engagement by the tourism industry in advocacy and planning activities that impact upon the industry.

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

Key to the progress of this plan will be;

• Negotiations between Whitsundays Marketing and Development Ltd (WMDL - the key tourism, business events/conventions and economic development agency for the Whitsunday region), funding partners and respective government agencies to ensure adequate funds are available for the staged implementation of the plan;

• Engaging business and communities to ensure in kind and volunteer contributions are maximised;

• Attraction of external grant funds to support available agency and community contributions; and

• WMDL, Whitsunday Regional Council and other agencies getting the balance right between supporting/attracting major developments versus community-economic and small business development.
Setting The Scene

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

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

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

In order to deliver on the vision and the targets for 2020, each RTO has led the development of a Destination Tourism Plan (DTP). These plans were developed in partnership with Local Government, State Government, Industry Associations, and Tourism and Events Queensland (TEQ) to set the direction for the future of tourism and events in each destination.
The Tourism Queensland 2012 Economic Update provides the 2020 and interim Annual Visitor Expenditure targets for the Whitsundays, as follows;

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

1. An integrated approach to planning that seeks to deliver, improved destination competitiveness; increased visitor satisfaction; economic, social and environmental sustainability; effective partnerships and continuous improvement;

2. Recognition of megatrends identified in the 2013 CSIRO authored report, ‘The Future of Tourism in Queensland – Megatrends, Creating Opportunities and Challenges Over the Coming Twenty Years’ (For further information see Appendix A); and

3. Alignment with the six key themes that make up the vision for the Queensland tourism 20-year plan;
   - Preserving our nature and culture;
   - Offering iconic experiences;
   - Targeting a balanced portfolio of markets;
   - Delivering quality, great service and innovation;
   - Building strong partnerships; and
   - Growing investment and access;

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

- Is there a demonstrated market demand?
- Is there destination stakeholder support?
- Are identified target markets and segments key contributors towards the Whitsundays 2020 vision?
- Will strategies make a significant contribution to achieving the Whitsunday 2020 targets?
- Do strategies leverage Whitsundays ‘hero experiences’?
- Are strategies realistic (but aspirational)?

The DTP is a living document. In recognition of ever-changing environments and influences, it will be reviewed and upgraded on an ongoing basis. The involvement of a comprehensive range of stakeholders in the development and ongoing monitoring of the DTP, combined with the selection of a small number of strategies likely to best assist the region in meeting its 2020 goals, provides an agreed direction for the Whitsunday region to pursue with tourism and events development to 2020.
ROLE OF TOURISM AND EVENTS IN OUR COMMUNITY
The region is home to 74 islands and is surrounded by one of the world’s seven natural wonders, the Great Barrier Reef. The region contains substantial national parkland, providing a vital life support system for ancient rainforests and exotic wildlife. The local economy is driven by tourism, mining, sugarcane, farming and cattle grazing.’
(Source: Mackay-Whitsundays RDEC 2012 Economic Snapshot)

The Whitsunday regional population is approximately 33,000. The Airlie Beach-Shute Harbour-Cannonvale precinct (population approx. 10,000), along with the adjacent islands, is recognised as the region’s key tourism precinct. Cannonvale continues to grow as a retiree and lifestyle residential location, and regional service centre.

Tourism accounts for an estimated 18% of the region’s economy (compared to 3.7% for Queensland and 3.0% for the national average). This ranks Whitsundays the 3rd highest region for the economic importance of tourism among the 77 tourism regions in Australia. (Source: Tourism Research Australia, ‘The Economic Importance of Tourism in Australia’s Regions’; published April 2011)

There were 634 tourism related businesses in the Whitsundays as at June 2011, of which 9 in 10 were small businesses employing less than 20 employees. (Source: Tourism Research Australia, ‘Tourism Businesses in Australia June 2009 to June 2011’; published July 2012)

In 2007-08 tourism directly accounted for 3,400 jobs in the Whitsunday region. Retail trade had the largest share of tourism employment (22.4%), followed by accommodation (20.6%) and cafes and restaurants (14.4%). (Source: STCRC, ‘Regional Economic Contribution of Tourism Destinations in Queensland’; published June 2010)

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

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

As such the Whitsunday region is continually raising the profile of Queensland’s ecotourism experiences and contributing to the Queensland Ecotourism Plan 2013-2020 vision for 2020. That is by 2020, ‘Queensland is Australia’s number one ecotourism destination and recognised as a world leader in ecotourism, delivering best practice nature-based experiences that contribute to the conservation of our natural resources and cultural heritage.’

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

• Bruce Highway (national Highway One) passing through the region;
• Importance of the grey nomad market;
• Large fly-drive market; and
• Attraction of the region to the expanding population of the greater/surrounding region (spurred by resources industry growth over the past decade);
Drive-tourism is of huge importance to the region, not only for tourism businesses, but also in supporting a large number of other services, retail businesses and jobs. Drive-tourism presents numerous future economic growth opportunities for the Whitsunday region. (Refer to the Queensland Drive Tourism Strategy 2013–2015)

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

Whitsunday Regional Council is a key partner in tourism development, as evidenced in the following Corporate Program statement in the Whitsunday Regional Council Community Plan 2011-2021;

‘Tourism and Economic Development

Objective
To pursue in conjunction with Economic Development and Tourism Agencies, the promotion and creation of new economic, social, tourism and cultural opportunities for all residents of the Whitsunday Regional Council.

Strategies
1. To foster and support Economic, Tourism, Social and Cultural Development within the region.
2. To collaboratively pursue funding opportunities.
3. To enhance opportunities for the creation of Tourism within the region.
4. To be a key player in economic growth within the region.
5. To continually maintain and improve Council’s tourism and community infrastructure to the highest standard, including Airlie Beach Lagoon, Bowen Foreshore, Shute Harbour Transit facility, Whitsunday Coast Airport and Proserpine Tourist Park.’

(Source: Whitsunday Regional Council Community Plan 2011-2021)
ABOUT OUR DESTINATION
About Our Destination

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

Historic development around Bowen is attributed to agriculture, fishing and development of Port Denison. Further south, Proserpine’s existence is attributed to agriculture, processing of raw materials such as timber, and beef cattle and sugar milling. Settlement at Airlie Beach and surrounds has been a result of its position, as the gateway to the Whitsunday Islands and Great Barrier Reef. Development of Airlie Beach and the tourism sector has led to the expansion of Cannonvale as a residential and retailing service centre, housing and servicing needs of local workers. The larger communities in the subregion, such as Proserpine, Bowen, Airlie Beach, Cannonvale and Collinsville are all expected to grow significantly. The subregion contains regional landscape and natural environmental values of national and international importance including the Whitsunday Islands, national parks, protected areas, riparian areas and sandy beaches that require protection for their ecological and scenic value. (Source: Qld Dept. of Local Government and Planning, Mackay, Isaac and Whitsunday Regional Plan 2012)
Visitors usually come to the Whitsundays to experience the scenic tropical seas, beaches, reefs and islands of the region. Whether it be a guided or on-tour experience or just finding your own way, sailing, snorkelling, diving, visiting national parks, bush-walking and fishing are all popular activities; as are relaxing on the beach or at a resort, socialising or ‘partying’ at a bar, dining out and shopping.

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

The following tables list Whitsundays visitors ‘Top 10 activities’

<table>
<thead>
<tr>
<th>Domestic Visitors Top 10</th>
<th>YE June 2013</th>
<th>International Visitors Top 10</th>
<th>YE June 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eat out at restaurants</td>
<td>74.8%</td>
<td>Go to the beach (incl. swimming, surfing, diving)</td>
<td>97.2%</td>
</tr>
<tr>
<td>Go to the beach (including swimming)</td>
<td>59.6%</td>
<td>Eat out / dine at a restaurant and/or cafe</td>
<td>94.5%</td>
</tr>
<tr>
<td>General sight seeing</td>
<td>44.8%</td>
<td>Sightseeing/looking around</td>
<td>94.5%</td>
</tr>
<tr>
<td>Go shopping (pleasure)</td>
<td>25.4%</td>
<td>Go shopping for pleasure</td>
<td>86.2%</td>
</tr>
<tr>
<td>Water activities or sports</td>
<td>23.5%</td>
<td>Visit national parks / State parks</td>
<td>80.1%</td>
</tr>
<tr>
<td>Visit friends and relatives</td>
<td>22.8%</td>
<td>Snorkelling</td>
<td>77.9%</td>
</tr>
<tr>
<td>Bushwalking or rainforest walks</td>
<td>21.6%</td>
<td>Pubs, clubs, discos etc</td>
<td>74.0%</td>
</tr>
<tr>
<td>Pubs, clubs, discos etc.</td>
<td>19.9%</td>
<td>Charter boat / cruise / ferry</td>
<td>73.5%</td>
</tr>
<tr>
<td>Visit national parks or State parks</td>
<td>17.1%</td>
<td>Go to markets</td>
<td>71.3%</td>
</tr>
<tr>
<td>Charter boat, cruise or ferry ride</td>
<td>15.9%</td>
<td>Bushwalking / rainforest walks</td>
<td>70.7%</td>
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The region is popular for annual sports and community events such as the Airlie Beach Race Week (sailing regatta); Schoolies Week; Airlie Beach Music Festival; Bowen Fishing Classic; Hamilton Island Race Week and growing events such as the Whitsunday Reef Festival, Airlie Beach Running Festival and Dirty Molle Island Escape (mountain biking event).

Whitsundays experiences align with all four key themes that contribute to the Queensland Brand – Queensland - Where Australia Shines;

1. Queensland Lifestyle... food, wine, produce, events, shopping, indulgence Queensland style
2. Islands and Beaches... reef experiences, water activities, surfing, beach culture
3. Natural Encounters... reef, rainforest, flora and fauna
4. Adventure... adventure activities, sailing, diving

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

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

Whitsundays ‘hero experiences’ are;

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

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

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

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

(Source: Whitsundays Hero Experiences Fact Sheet)

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

1. **Icons** – e.g. Heart Reef; Whitehaven Beach; Great Barrier Reef (one of the 7 Natural Wonders of the World and World Heritage Listed); Whitsundays Islands National Park. It is the only place in the world where there is reef in such quality and quantity!

2. **Un-spoilt environment** – other natural attractions (e.g. 74 islands - 66 not developed, pristine beaches, fringing reefs, Conway N.P.); clean potable water; clean air/lack of air pollution; clean seas

3. **Safe environment** - safe/regulated food industry; low crime rates; political stability; safe/regulated passenger transport industry; etc.

4. **Accessibility** – Two regional airports with Regular Passenger Transport (RPT) services; good road access (Bruce Highway; Greyhound Australia; local timetabled bus services; rental cars); Queensland Rail and year-round sea access (ports, marinas and safe mooring at islands and on the mainland);

5. **Industry skills & experience** – mature industry; best practice focus; WMDL, WRC and TEQ knowledge, advocacy and support;

6. **Diversity** – of product, accommodation; dining experiences; experiences; target markets; etc.
MORE VISITORS      INCREASED LENGTH OF STAY      INCREASED SPEND PER DAY

DESTINATION TOURISM
PERCEPTIONS
Destination Tourism Perceptions

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

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

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

The following related information is sourced from the TEQ research publication, ‘Whitsundays Social Indicators 2013’. Of those Whitsundays residents surveyed;

- 70% wanted more tourists (compared to 45% Qld wide) Only 1% wanted fewer tourists;
- 74% ‘like tourists’ (compared to 57% Qld wide);
- 67% were happy with continued development growth (compared to 59% Qld wide). Note: 25% wanted growth in a different direction;
- 99% agreed that tourism provided greater cultural diversity (compared to 92% Qld wide);
- 95% agreed that tourism provided important economic benefits (compared to 91% Qld wide);
- 89% agreed that festivals and events attract tourists and raise awareness (compared to 87% Qld wide); and
- 42% thought tourism had a negative impact of local character (compared to 29% Qld wide)
COMPETITOR ANALYSIS
COMPETITOR ANALYSIS

In terms of destinations offering coastal or island holidays in tropical/subtropical climates; opportunities to dive and snorkel coral reefs; unspoilt environments; a place to escape your normal life and discover new experiences; a place to socialise and party; etc. the local industry (at a January 2014 workshop) identified the following competitors;

<table>
<thead>
<tr>
<th>Key Direct Competitors</th>
<th>Other Direct Competitors</th>
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<tr>
<td>Cairns</td>
<td>Cruise Ships</td>
</tr>
<tr>
<td>Southern Great Barrier Reef</td>
<td>Maldives</td>
</tr>
<tr>
<td>Bali</td>
<td>Greek Islands</td>
</tr>
<tr>
<td>Fiji</td>
<td>Thailand</td>
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It was also recognised that other key tourism destinations (such as Brisbane/Gold Coast; Queenstown N.Z.; ski resorts) are competitors. Importantly there is also competition for expenditure of disposable income from outside the tourism industry, e.g. Harvey Norman, paying off the mortgage, a new car.

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

- **The Great Barrier Reef** is one of the seven natural wonders of the world. It is World Heritage Listed and is the only place in the world where there is reef in such quality and quantity!

- **The regions ‘pristine’ natural environment.** Because of its clean environment and waters and excellent management practices over decades the Great Barrier Reef; islands; fringing reefs; and mainland parks and reserves offer great diversity of habitats and ecosystems; fauna and flora and a wealth of associated experiences. It boasts 74 islands of which 66 are not developed and more national parks and walking trails than many competitors.

- **Key icons such as Heart Reef and Whitehaven Beach**

- **The Whitsundays is a year-round sailing destination and one of the best sailing grounds in the world,** supported by international quality marina developments, ports that are accessible year-round and a calendar of events

- **Ease of access,** e.g. good road and self-drive access; two regional airports; ports; ferry, cruise and boat hire equals easy access around the mainland, islands and to the Great Barrier Reef

- **Value for money,** i.e. in terms of all the above and in consideration of the high quality experiences and services on offer the Whitsundays offers great value for money.

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

From a domestic viewpoint competitive advantages include **strong brand recognition** amongst consumers.
WHERE ARE WE NOW?
Where Are We Now?

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

Bowen is an extremely popular destination with the grey nomad market (unwinders and social fun-seekers) from May-October with boating, fishing, swimming and relaxing at a caravan park being popular beach side activities. Bowen also attracts 1,000 - 1,500 backpackers on working holidays from May-December annually to work in the fruit, horticulture and sugar industries.

Proserpine is located inland on the Bruce Highway and attracts a combination of self-drive travellers taking a rest or short break; recreational fishers fishing for Barramundi at Peter Faust Dam and day-trippers from the main Airlie Beach tourist precinct 40km away.

Collinsville is largely a coal mining town. Located 80 km inland from Bowen it traditionally attracts visitors to local events, the VFR market and self-drive tourists exploring alternative routes to destinations.

Like many Australian regions, the Whitsundays tourism industry has had some tough times over the past decade. The GFC and strong Australian dollar over recent years resulted in a significant reduction in the numbers of European backpackers coming to Australia and to the region (see table below – International Source Markets). Similarly many domestic tourists took advantage of the cheap international travel and headed overseas rather than holidaying at home. Tropical cyclones and the negative impacts of the Queensland floods in 2010-2011 resulted in fewer visitors coming to Queensland and to the region.

Whilst a majority of operators successfully traded through these tough times, some resorts and businesses did close. Fortunately many operators from the Airlie Beach district report a positive rebound in visitor and backpacker numbers over the past 6 months (due to a strengthening recovery of the European economy and weakening of the Australian dollar).

For the 2012-2013 financial year;

• There were 654,000 visitors to the Whitsundays who stayed an average 5.25 nights
• There was a 5 year trend of 3% negative growth in total visitor numbers, which can be attributed to the impact of the GFC and high Australian Dollar.
• Of these total visitors there were 181,000 international visitors who spent an average 7.12 nights each in the region
• This represented a 5-year trend of 4% negative growth in international visitor numbers but a 1% positive growth in night stays
• Approx. 95% of international visitors came for holidays
• There were 279,000 intrastate visitors who stayed an average 3.36 nights in the region
• There were 193,000 interstate visitors who stayed and average 6.23 nights in the region
• 70% of total visitors are for the purpose of holidays and 12% are VFR (visiting friends or relatives)
• Domestic visitor expenditure in the region was $577K for the year. International Visitor expenditure was $128K. Total expenditure was $705K
• There were an additional 249,000 domestic day trips to the Whitsundays, making a total of 903,000 visitors for the year. 59% of day visitors were from the Mackay region; 22% from the Whitsundays and 18% from the Northern region

Data averaged over 2009-2012 (3 years) indicates;

• 44% of internationals are from continental Europe; 28% from the United Kingdom and 12% from North America
• 13% of domestic visitors are from Brisbane; 36% from regional Qld and 51% from interstate (mainly NSW and Vic)
<table>
<thead>
<tr>
<th>SUBJECT</th>
<th>DOMESTIC VISITORS</th>
<th>INTERNATIONAL VISITORS</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ spend per night in the Whitsundays</td>
<td>$251 (compared to $174 in Qld)</td>
<td>$110 (compared to $94 in Qld)</td>
</tr>
<tr>
<td>come by road - drive</td>
<td>52%</td>
<td>33%</td>
</tr>
<tr>
<td>come by road – coach or bus</td>
<td>-</td>
<td>37%</td>
</tr>
<tr>
<td>come by air</td>
<td>41%</td>
<td>25%</td>
</tr>
<tr>
<td>stay in a hotel, motel, resort</td>
<td>36%</td>
<td>-</td>
</tr>
<tr>
<td>stay in rented house or apartment</td>
<td>16%</td>
<td>11%</td>
</tr>
<tr>
<td>stay in friend or relatives property</td>
<td>15%</td>
<td>-</td>
</tr>
<tr>
<td>stay in serviced apartment</td>
<td>8%</td>
<td>-</td>
</tr>
<tr>
<td>stay in caravan park or commercial camp ground</td>
<td>7%</td>
<td>11%</td>
</tr>
<tr>
<td>stay in backpacker or hostel</td>
<td>-</td>
<td>35%</td>
</tr>
<tr>
<td>travelling as adult couple</td>
<td>31%</td>
<td>26%</td>
</tr>
<tr>
<td>travelling as family group</td>
<td>31%</td>
<td>4%</td>
</tr>
<tr>
<td>travelling alone</td>
<td>11%</td>
<td>52%</td>
</tr>
<tr>
<td>travelling friends and/or relatives group</td>
<td>21%</td>
<td>17%</td>
</tr>
<tr>
<td>age group 15-24 years</td>
<td>17%</td>
<td>39%</td>
</tr>
<tr>
<td>age group 25-34 years</td>
<td>18%</td>
<td>37%</td>
</tr>
<tr>
<td>age group 35-44 years</td>
<td>2%</td>
<td>8%</td>
</tr>
<tr>
<td>age group 45-54 years</td>
<td>17%</td>
<td>6%</td>
</tr>
<tr>
<td>age group 55 -64 years</td>
<td>16%</td>
<td>7%</td>
</tr>
<tr>
<td>age group 65 years and over</td>
<td>10%</td>
<td>4%</td>
</tr>
</tbody>
</table>

The following table identifies trends in Whitsundays international visitors/source markets.

<table>
<thead>
<tr>
<th>INTERNATIONAL SOURCE MARKETS</th>
<th>YE June 2008</th>
<th>YE June 2012</th>
<th>Ye June 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Zealand</td>
<td>10,000</td>
<td>6,000</td>
<td>8,000</td>
</tr>
<tr>
<td>Japan</td>
<td>6,000</td>
<td>7,000</td>
<td>8,000</td>
</tr>
<tr>
<td>Hong Kong (SAR of China)</td>
<td>2,000</td>
<td>1,000</td>
<td>2,000</td>
</tr>
<tr>
<td>Korea</td>
<td>2,000</td>
<td>1,000</td>
<td>2,000</td>
</tr>
<tr>
<td>China (excludes SARs and Taiwan Province)</td>
<td>0</td>
<td>2,000</td>
<td>4,000</td>
</tr>
<tr>
<td>USA includes Hawaii</td>
<td>13,000</td>
<td>13,000</td>
<td>13,000</td>
</tr>
<tr>
<td>Canada</td>
<td>16,000</td>
<td>9,000</td>
<td>9,000</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>65,000</td>
<td>42,000</td>
<td>48,000</td>
</tr>
<tr>
<td>Germany</td>
<td>29,000</td>
<td>21,000</td>
<td>26,000</td>
</tr>
<tr>
<td>Scandinavia</td>
<td>12,000</td>
<td>10,000</td>
<td>10,000</td>
</tr>
<tr>
<td>France</td>
<td>7,000</td>
<td>9,000</td>
<td>10,000</td>
</tr>
<tr>
<td>Italy</td>
<td>4,000</td>
<td>3,000</td>
<td>6,000</td>
</tr>
<tr>
<td>Netherlands</td>
<td>11,000</td>
<td>6,000</td>
<td>7,000</td>
</tr>
<tr>
<td>Switzerland</td>
<td>7,000</td>
<td>6,000</td>
<td>6,000</td>
</tr>
<tr>
<td>Other Europe</td>
<td>25,000</td>
<td>14,000</td>
<td>14,000</td>
</tr>
</tbody>
</table>
Whitsundays current target markets are;

**Tier One (Primary):**

- Connectors in Brisbane and Regional Queensland
- Social Fun-seekers in Sydney and Melbourne
- North America, United Kingdom, Germany and France

**Tier Two (Secondary):**

- New Zealand, China, Scandinavia, Netherlands, Switzerland and Korea

**Tier Three (Emerging):**

- Active Explorers in Sydney and Melbourne
- Taiwan, Hong Kong, Japan, India and Middle East

It is important to note that the Whitsundays lies at the top of the Bowen Basin and significant resources industry expansion (mainly coal mining and associated infrastructure construction) has driven up the residential population in the Mackay-Isaac-Whitsundays region by estimated 20-25% over the past decade (e.g. Mackay population has grown by over 27% to be approx. 120,000). As a result the Whitsundays has seen an 8% p.a. rise in the VFR market over the past 5 years (256,000 nights in 2007-08 to 417,000 nights in 2012-13).
WHERE WILL WE BE IN 2020?
Where Will We Be In 2020?

‘By 2020 the Whitsundays will be globally recognised as one of the world’s leading tropical island and marine leisure holiday destinations’.

During the course of community consultation it was clear that there are a number of drivers or catalytic activities that will ensure that the Whitsundays meet its 2020 targets.

Key drivers include:
• Better access into Whitsunday Coast Airport (more domestic direct flights and charter flights direct from China and New Zealand);
• More resorts/hotels (including a full service internationally branded hotel at Airlie Beach);
• Increased numbers of events creating a full annual calendar.
• Improved access to attractions and products (more tour operations and attractions etc.);
• Growth in cooperative marketing and packaging by local operators in partnership with WMDL and TEQ; and
• Increased infrastructure to support tourism growth.

Other key drivers identified in the process include:
• Significantly more higher yield Chinese visitors;
• More short intense visits (higher yield and crammed with experiences);
• Improved services, social infrastructure and more retail diversity (more shopping centres, education and health facilities, entertainment and leisure facilities supporting a growing resident population and tourism industry);
• Better customer service and increased employment of local residents in tourism;
• Growth in cooperative packaging and marketing initiatives by local operators;
• Increased product/attractions for youth and families;
• Growth in delivery of experiences;
• More glamping;
• Increased regional and VFR visitors;
• New as well as refurbished island resorts;
• A regional tourism education/training facility (the Whitsundays recognised as a regional tourism centre of excellence).

The Whitsundays 2020 goal is to raise annual visitor expenditure from $705 million in 2012-13 to $1.24 billion in 2019-20. That is a 75.9% increase or an annual growth of 8.2%.

### WHITSUNDAYS GROWTH GOALS TO ACHIEVE 2020 TARGET

<table>
<thead>
<tr>
<th>source of visitors</th>
<th>number visitors</th>
<th>average stay (number nights)</th>
<th>total nights 000's</th>
<th>average $ spend/night (day)</th>
<th>total $ 000's contribution to annual visitor expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Qld</td>
<td>279,000</td>
<td>340,000</td>
<td>3.36</td>
<td>4.0</td>
<td>938</td>
</tr>
<tr>
<td>Domestic</td>
<td>193,000</td>
<td>240,000</td>
<td>6.23</td>
<td>6.9</td>
<td>1,203</td>
</tr>
<tr>
<td>Interstate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>International</td>
<td>181,000</td>
<td>210,000</td>
<td>7.12</td>
<td>7.5</td>
<td>1,289</td>
</tr>
<tr>
<td>Subtotal</td>
<td>653,000</td>
<td>790,000</td>
<td>3,430</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domestic Day Trips</td>
<td>249,000</td>
<td>300,000</td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>902,000</td>
<td>1,090,000</td>
<td>3,430</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Note: there is no analysis or breakup in statistics provided to differentiate the daily spend between intrastate and interstate visitors, so the same $269/night figure is used in this table.

** Note: Qld average is $113, so assume $130
In summary, for the Whitsundays to reach the 2020 milestone/goal, between 2013 and 2020 the region will need to increase:

- Visitor numbers by 20.8%;
- The average length of stay by approx. half a day/night (approx. 11%);
- Total number of nights in the region by 33.8%;
- The average spend/night/day by approx. $58.

The Deloitte Access Economics report, ‘Queensland Tourism - Industry Outlook and Potential to 2020’, for the Qld Department of Tourism, Major Events, Small Business And Commonwealth Games - August 2012, makes the following forecasts for the Whitsundays region:

- Both the TFC forecast and industry potential suggest strong growth in international visitor nights in the Whitsundays. The TFC forecasts indicate about 1.6 million international visitor nights are expected by 2020 (18% increase from 2010 levels), while the industry potential estimates 2 million visitors nights, which is a 48% increase from 2010.

- In terms of domestic overnight visitors, the TFC forecasts a relatively small growth of a total of 1.5% over the coming decade, while the industry potential shows a substantial increase of 24% by 2020.

- Current expectations on the domestic and international visitor market will drive a notable growth in total tourist expenditure forecasts in the Whitsundays by 2020. The outlook provided by the TFC forecast indicates that total expenditure will increase nominally by 56% by 2020, while the industry potential suggests 101% growth.

In developing and prioritising strategies that will enable the Whitsunday region to achieve its 2020 goal, recent research and planning by state government provides valuable information.
MORE VISITORS      INCREASED LENGTH OF STAY      INCREASED SPEND PER DAY

MEGATRENDS
Megatrends

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

The Orient Express – Although currently Asian tourists are relatively few in percentage terms to the Whitsundays, being located in Queensland with easy air access from China, India and S.E. Asia, provides numerous opportunities for our industry/operators to take advantage of a growing Asian middle class (their capacity and desire to travel) providing we can provide an aspirational destination and offer value-for-money.

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

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

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

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

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

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

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

The Lucky Country – Although Australia has weathered the GFC comparatively well, the region recognises its limitations in terms of high labour costs and other input costs. Our focus is in delivering value for money experiences rather than lowest cost.
The Whitsundays product, experiences and opportunities align strongly with the state marketing directions and opportunities identified in the 2020 Strategic Marketing Plan Tourism And Events In Queensland (2012 Publication). As follows:

- As one of the Great Barrier Reef regions the Whitsundays is fortunate in that the Reef has tremendous visitational pull at an international level;
- The Whitsundays also has a specific visitational pull for niche opportunities, e.g. the wedding, sailing and incentives markets;
- To maximise the effectiveness of marketing efforts the Whitsundays has an ongoing program of reviewing/fine-tuning the effectiveness of its brand (positioning, recognition, delivery);
- Whitsundays target markets align with the state 2020 Marketing Plan aims, e.g. to
  » To nearly double visitor expenditure from Victoria, NSW, rest of Australia and New Zealand markets by 2020 (all of which are Whitsundays key markets)
  » To raise intrastate and international visitor expenditure, specifically from the USA and UK markets (which are important international markets for the Whitsundays);
- WMDL has a Tourism Whitsundays Events Innovation Strategy (2011) that forms an agreed basis for events development in the region. However further opportunities to align events with leisure, healthy lifestyles and underutilised product and resources exist and will be pursued;
- There are numerous opportunities for the Whitsundays to;
  » Convert day trippers to overnight visitors
  » Increase visitor expenditure from VFR
  » Focus on fewer marketing activities with greater impact
- WMDL will continue its digital focus to ensure related marketing leverages ‘the credibility, authenticity and immediacy of digital and social media opportunities as they continue to emerge and evolve’.
MORE VISITORS      INCREASED LENGTH OF STAY      INCREASED SPEND PER DAY
Queensland Ecotourism Plan 2013-2020

Many Whitsundays experiences are based on pristine natural environments (marine and terrestrial); discovering Australia (nature, people, culture); and enjoying healthy lifestyle outdoor activities. There is strong alignment between the direction the Whitsundays region wishes to take in growing the tourism industry and the Queensland Ecotourism Plan 2013-2020, e.g. we share the vision for Queensland to be, ‘Australia’s number one ecotourism destination and recognised as a world leader in ecotourism, delivering best practice nature-based experiences that contribute to the conservation of our natural resources and cultural heritage.’

The Whitsundays Islands and Great Barrier Reef already have recognition as world-class beauty and natural environments. The region has numerous eco-tourism accredited businesses providing world-class nature based activities and experiences. To grow sustainable eco-tourism the Whitsunday Region can:

- Advocate for development control and government decision making to ensure that the regions natural environments and eco-systems are protected;
- Develop opportunities to engage visitors in experiencing the regions parks, reserves, marine environments, etc. with a particular focus on new or refreshed events, products and infrastructure that;
  - Realigns existing experiences to remain relevant to traditional markets and engages new markets
  - Grow the number of overnight and day-trip visitors wanting to participate in nature-based activities
  - Capitalise on the increasing number of visitors seeking active engagement and improved wellbeing from their holidays
- Development of a Whitsundays Airlie Beach Marine Discovery Centre, a facility providing excellence in interpretation—drawing on science, research and storytelling to provide visitors with an enriching experience.
MORE VISITORS INCREASED LENGTH OF STAY INCREASED SPEND PER DAY

QUEENSLAND DRIVE TOURISM STRATEGY 2013-2020
Queensland Drive Tourism Strategy 2013-2020

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

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

Challenges to overcome include:

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

WHITSUNDAY REGIONAL COUNCIL
CORPORATE PLAN 2014-2019
The Whitsunday Regional Council (WRC) is focused on growing the Whitsunday Region economy and delivering the infrastructure and services required to accommodate growth. In 2014, WRC developed through strong community consultation, a new Corporate Plan for the Council focussed on delivering key actions by the year 2020.

WRC identified a number of strategic priorities which are central to the growth and development of the region. These are;

- Advocating for the implementation of the Bruce Highway Action Plan;
- Development of the Whitsunday Coast International Export Hub as a significant transport and exports hub;
- Advocate for the establishment of a significant integrated resort development;
- Advocate for the growth of the agriculture, horticulture and seafood sectors for expanding export opportunities;
- Advocate for the construction of the Urannah Dam and improvements to the Burdekin Falls Dam;
- Advocate for the establishment of a base load power station at Collinsville and alternative energy sources; and
- Advocate for the continued development of the Port of Abbot Point and the Abbot Point State Development Area.

The Council’s key goal in terms of economic development is;

“In 2020, the Whitsunday Region is the economic hub of North Queensland and the state’s leading regional economy. The diversity of our agriculture, mining, small business and tourism sectors has allowed our region to prosper, with our residents enjoying access to strong education and employment pathways”
MORE VISITORS
INCREASED LENGTH OF STAY
INCREASED SPEND PER DAY

GROWTH IMPLICATIONS
There are growth implications if the Whitsunday region is to achieve its 2020 goal;

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

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

- Will provide additional 4½ to 5-star plus accommodation required to attract business conventions and conferences, and higher yield domestic and international markets;
- Will deliver additional marketing resources and international promotion for the Whitsundays, which (it is assumed) would come from a brand chain promoting its brand and hotel at Airlie Beach; and
- May be incorporated into a multi-function precinct that could include convention, hotel, entertainment and retail/dining facilities.

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

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

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

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

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

The **Whitsundays Ecotourism Strategy** (Dec 2008 - prepared for Tourism Whitsundays and Tourism Queensland) identifies numerous new eco-tourism opportunities that will provide new product that aligns with the aspirations of both the Whitsundays and Queensland tourism industries to preserve our environment and culture.

**Workforce** – Leading up to 2020 the Whitsunday region’s tourism industry will require increasing levels of labour, that far outreaches forecast...
population increases. Compared to other regions there will be higher demand, ‘for those with specialist skills relating to water-based activities, and the high-end nature of a number of the hotel and restaurant operations with associated skills requirements’.

(Source: Deloitte Access Economics report, ‘Queensland Tourism - Industry Outlook and Potential to 2020’, for the Qld Department of Tourism, Major Events, Small Business and Commonwealth Games - August 2012)

The region experiences ongoing issues with worker attraction and retention. The nature of much work is casual and the workforce is transient, so when demand slows and hours reduce, employees are dismissed. Many workers are backpackers on a working holiday and are restricted in the length of time they are able to work in Australia. Some operators have particular difficulties attracting and retaining management staff as there is a lack of suitably qualified candidates. This is particularly an issue on the islands where staff are often required to live on-site and where the island’s lifestyle is restrictive in terms of leisure and socialising opportunities.

In terms of preparing for opportunities to grow international visitation from Asia (particularly China) it has been identified that many operators and front line workers require training and skills development (up-skilling) to be able to deliver services and communicate in a culturally aware manner.

WMDL has produced a Draft Whitsunday Workforce Development Plan 2013-2015 with a view to addressing workforce issues, e.g. improving worker skills and qualifications, improving staff attraction and retention outcomes.

**Community** - The Whitsunday Regional Council Estimated Resident Population for 2012 is 33,324. (Source: http://profile.id.com.au/whitsunday/home)

The Whitsundays resident community are very supportive of the tourism industry and tourism development, appreciative of the fact that it is a cornerstone of the local economy, employing 3,000 people.

Key to the Whitsunday region’s success in achieving its 2020 goals will be engaging the community as a resource, to develop and grow new tourism product and events. This will require strategies that provide facilitation assistance, skills development and mentoring within and in between communities.

Forecasts are for considerable residential growth in the Whitsundays with people attracted to the region as a lifestyle choice and for the attractive environment and climate. A majority of this growth will be at Cannonvale and Cannon Valley adjacent to the key Airlie Beach tourist precinct.

In addition, there is substantial population growth forecast for the adjoining regions that make up a substantial source of day-trip and short-break visitors to the Whitsundays. Much of this growth relates to the resources and construction industries. Residents with higher wages and levels of disposable income will make up a substantial portion of increases in annual visitor expenditure in the Whitsundays during the next decade. A key component of this will be the VFR market.

**Other infrastructure** – There is strong local support for a fully integrated, brand name resort development at Airlie Beach. The preferred concept is an International Hotel-Convention Centre-Retail and Dining precinct.

At a January 2014 workshop held in Airlie Beach members of the local tourism industry and key stakeholders identified a Conference/Convention Venue (for weddings, events, meetings, incentives, conferences, and exhibitions; having iconic design) as the number one priority to pursue to enable delivery of the Whitsunday Region’s Tourism 2020 increase in annual visitor expenditure goal.

Whitsunday Regional Council is pursuing a broader economic development infrastructure project (with tourism implications) for the Whitsunday Coast Airport, i.e. an integrated transport hub. Advantages are the close proximity of the north-south rail line and Bruce Highway. A Master Plan has been adopted by the Council. Processes are in place to gain the appropriate planning approvals and attract joint venture partners. The vision for the site includes a FIFO site for the regions resources and construction industries workforces; direct flights out of regional agricultural (horticulture) produce to domestic and international markets; related industry development on-site; eventually international airport status with direct international passenger flights. Development of Abbott Point will contribute to the success of the project/to attaining the vision.

At a January 2014 workshop members of the local tourism industry and key stakeholders identified an international airport in the Whitsundays as the second highest priority to help deliver the Whitsunday Region’s 2020 Tourism goal.
TOP OPPORTUNITIES AND CHALLENGES
### Top Opportunities and Challenges

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

<table>
<thead>
<tr>
<th>Review of key local plans and strategies e.g.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The Whitsundays Destination Tourism Strategy 2012–2016</td>
</tr>
<tr>
<td>• The Whitsundays Tourism Opportunity Plan 2012–2016</td>
</tr>
<tr>
<td>• Whitsunday Priority projects 2013</td>
</tr>
<tr>
<td>• Tourism Whitsundays Events Innovation Strategy (2011)</td>
</tr>
<tr>
<td>• Whitsunday Regional Council Community Plan 2011–2021</td>
</tr>
<tr>
<td>Review of Airlie Beach, Bowen, Collinsville and Proserpine Tourism Summit 2013 results</td>
</tr>
<tr>
<td>New research</td>
</tr>
<tr>
<td>• January 2014 DTP Working Group (focus group) Workshop results</td>
</tr>
<tr>
<td>• Individual key stakeholder consultation</td>
</tr>
</tbody>
</table>

Filtered to ensure alignment with state strategies e.g.

• The CSIRO Futures ‘The Future of Tourism in Queensland – Megatrends, etc’ report
• Queensland Ecotourism Plan 2013-2020
• Queensland Drive Tourism Strategy 2013-2015
• TEQ 2020 Strategic Marketing Plan
• Destination Q Blueprint 2012-2015
• Queensland Tourism 20-year Plan key themes

### Top Opportunities

1. Regional population growth
2. Optimise the regions marketing outcomes
3. Product and facilities development
4. Events development
5. Developing Drive Tourism
6. Development of international runway at the Whitsunday Coast Airport

### Top Challenges

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

**Take advantage of population growth in the immediate and greater region (Galilee and Bowen basins, Townsville, etc.) by maximising opportunities to grow day-trip, short-break and VFR visitation to the Whitsunday region**

**Rationale**

Queensland Trade and Treasury Office of Economic and Statistical Research Population and Dwelling Profiles (April 2012 Update publications) project that the populations of the region will increase by approx. 100,000 (20%) between 2011 and 2020 (low series projections). The Whitsundays are already popular as a day-trip and short-break destination for residents from surrounding regions. Between 2009 and 2012, 19% of domestic overnight travellers to the Whitsundays identified ‘visiting friends or relatives’ as the purpose of their visit. Maintaining or growing these markets in line with regional population growth (should this growth occur as forecast) provides the region with one of its best opportunities to attain the 2020 $1.24 billion annual visitor expenditure milestone.

**Alignment with WRC Corporate Plan**

- Promote the Whitsunday Region as a desirable domestic and international tourist destination;
- Promote the continued development of the tourism sector;
- Promote living, investing and shopping locally;
- Encourage the retention of existing local industries and business and the development of emerging industries and businesses;

**Alignment with the state 20 Year Tourism Plan six strategic directions**

- Offering iconic experiences
- Targeting a balanced portfolio of markets

### Strategy Two

**Refocus regional marketing initiatives to improve performance/attract more visitors from southern, interstate and eastern seaboard markets, in particular Melbourne, Sydney and N.Z. markets**

**Rationale**

Sydney, Melbourne and eastern seaboard markets are the backbone of high-yield visitation to the Whitsundays. There is a view that the region is not performing as well as it could in these markets. In addition there are local desires to re-establish lost Melbourne and Sydney direct flights to Whitsunday Coast Airport. An important step in doing this (and supporting the new Tiger Airlines Sydney-Proserpine service as well as the Melbourne-Hamilton Island service) is to increase patronage from these markets. In 2012-13 there were 8,000 NZ visitors to the Whitsundays. They stayed 84,000 nights, i.e. 10.5 nights per visitor on average. This compares to the average international length of stay of 7.12 nights. NZ visitors stay longer. Exchange rates between NZ and $A are now very favourable for NZ travel to Australia. In Feb 2013 it cost approx. NZ$1.27 for A$1. It is now NZ$1.07 for A$1. NZ visitors have a high repeat visitation to Australia.

It is interesting to note that in the TEQ Whitsundays Brand Health Check 2013 publication, one in five Whitsundays consumers identified the Whitsundays as their first or second preferred destination (preferrers). Yet only one in ten consumers would recommend (recommenders) the Whitsundays to others. This perhaps presents an opportunity for the region to pursue, i.e. encourage more consumers and all preferrers to become recommenders.

**Alignment with WRC Corporate Plan**

- Enhance tourism and entry signage across the Whitsunday Region;
- Partner with tourism, business and economic development organisations to promote the local tourism and small business sectors;
- Promote the Whitsunday Region as a desirable domestic and international tourist destination;
- Promote the continued development of the tourism sector;
- Promote living, investing and shopping locally;
- Encourage the retention of existing local industries and business and the development of emerging industries and businesses;
- Improve the utilisation of Council owned aerodromes and aviation assets.

**Alignment with the state 20 Year Tourism Plan six strategic directions**

- Offering iconic experiences
- Targeting a balanced portfolio of markets
- Building strong partnerships
### Strategy Three

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

**Rationale**

DTP consultation provided feedback that;
- It is not generally recognised by consumers that they can access the Great Barrier Reef (GBR) from Airlie Beach/the Whitsundays
- Heart Reef in the GBR is one of the region's key icons and USP's
- It is a strategy of the WMDL/Whitsundays China Plan to, ‘position Heart Reef as a must do Australian Icon alongside Sydney Harbour Bridge and Ayers Rock’ (Uluru)
- The Whitsunday brand needs to better embrace the GBR (more emphasis on)
- The Great Barrier Reef has tremendous visitational pull at an international level and the Whitsundays need to make more of its position in the centre (heart) of the reef

It is also the case that WMDL events development activities include developing a month of romance (weddings, honeymoons, anniversaries special interest markets). The Whitsundays has visitational pull for the wedding market and the presence of Heart Reef adds to opportunities.

It is also noted that the region is at a disadvantage with some competitors in terms of accessing the GBR. The GBR is further away (2-3 hours by fast boat) and as a dive/snorkelling experience it is a daytrip. This extra sea travel adds to the tour cost. There is only one boat tour operator (regular tours) (although other boats can be chartered). It follows that care must be taken to ensure that false consumer expectations are not generated and that demand can be met.

**Alignment with WRC Corporate Plan**

- Partner with tourism, business and economic development organisations to promote the local tourism and small business sectors;
- Promote the Whitsunday Region as a desirable domestic and international tourist destination;
- Promote the continued development of the tourism sector;
- Encourage the retention of existing local industries and business and the development of emerging industries and businesses;
- Develop and implement policies and strategies that protect and enhance the Whitsunday region’s natural environment;

**Alignment with the state 20 Year Tourism Plan six strategic directions**

- Offering iconic experiences
- Targeting a balanced portfolio of markets

### Strategy Four

**Increase the attractiveness of the Whitsundays as an Australian holiday destination to Chinese target markets**

**Rationale**

In terms of visitor numbers, China is currently Australia’s third largest inbound market. In the year ended December 2012, there were 589,000 Chinese visitors to Australia, accounting for 10% of total international visitors. 44% of Chinese visitors came to Queensland. Chinese visitor numbers to the Whitsundays were 4,000 in 2012-13. Although only 2.3% of international visitors over 25% annual growth in the Chinese market is forecast, if the Whitsundays can take advantage of the strong alignment of their product and experiences with what the Chinese market looks for when choosing a holiday destination.

The region has the advantage of some key operators already focussed on the Chinese market. A challenge is to increase the amount of China ready product and generally align the local industry to meet forecast growth in Chinese visitors. *The Whitsundays 74 Island Wonders China Plan - July 2013 – June 2015* addresses these issues, targeting;
- Australian based Chinese families and students (targeting VFR from China)
- Inbound Tour Operators and Chinese Aussie Specialists
- Chinese Independent Travellers (with a geographic focus on Shanghai, Beijing and Guangzhou as source markets) (Aligning with TEQ target markets identified in *Setting the direction for the China market 2012 – 2016*; Tourism Qld publication)
### Alignment with WRC Corporate Plan
- Partner with tourism, business and economic development organisations to promote the local tourism and small business sectors;
- Promote the Whitsunday Region as a desirable domestic and international tourist destination;
- Advocate for the establishment of an integrated resort development within the Whitsundays Region;
- Promote the continued development of the tourism sector;
- Promote living, investing and shopping locally;
- Encourage the retention of existing local industries and business and the development of emerging industries and businesses;
- Improve the utilisation of Council owned aerodromes and aviation assets.

### Alignment with the state 20 Year Tourism Plan six strategic directions
- Preserving our nature and culture
- Offering iconic experiences
- Targeting a balanced portfolio of markets
- Delivering quality, great service and innovation

### Strategy Five Support the development of major projects that will enhance the visitor experience and appeal of the region

**Rationale**
Recent WMDL planning (supported by DTP research and consultation) has identified key projects that are highly sought after by the Whitsundays tourism industry. These include;

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

**A community, entertainment and events centre.** It is reported that once numbers are 260-300 then the only venue in the Airlie Beach–Islands region capable of conference hosting is Hamilton Island (which already has significant year-round business). It has been suggested that a multi-purpose convention centre at Airlie Beach is needed to host large events and provide an undercover venue during inclement weather. Anecdotal evidence suggests this will present an opportunity to boost mid-week occupancy rates, i.e. by hosting Australian (national/regional business meetings/events. Such a venue should be located within walking distance of most Airlie Beach accommodation and should have plenty of break-out rooms/facilities, large plenary theatre with tiered seating, dining room, exhibition spaces, etc. and be capable of hosting over 500 delegates. Such a facility could be multipurpose, including car parking, a cinema and dining outlets. The idea requires concept and feasibility planning.

**A wave pool.** It is reported that a developer wants to invest substantial finances in establishing a Flow House™ entertainment venue at Airlie Beach. Such a venue may incorporate flow-boarding, food, beverage, retail and events. It would address a need the local tourism industry constantly expresses for, ‘more land-based activities for families and youth’ and ‘something to do when the weather turns foul’. As an international brand and venue capable of hosting international events it would be a significant marketing asset/attraction for the Whitsundays.

### Alignment with WRC Corporate Plan
- Ensuring a regulatory environment which is business friendly and considerate of business needs;
- Enhance tourism and entry signage across the Whitsunday Region;
- Partner with tourism, business and economic development organisations to deliver training programs and initiatives for the tourism and small business sectors;
- Advocate for the establishment of an integrated resort development within the Whitsundays Region;
- Promote the continued development of the tourism sector;
- Promote living, investing and shopping locally;
- Encourage the retention of existing local industries and business and the development of emerging industries and businesses;
- Advocate for the implementation of the Bruce Highway Action Plan; and
- Improve the utilisation of Council owned aerodromes and aviation assets.

### Alignment with the state 20 Year Tourism Plan six strategic directions
- Offering iconic experiences
- Targeting a balanced portfolio of markets
- Delivering quality, great service and innovation
- Building strong partnerships
- Growing investment
<table>
<thead>
<tr>
<th>Strategy Six</th>
<th>Support the development of new product and experiences that encourage distribution of visitors and tourist dollars throughout the region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rationale</td>
<td>Project research and consultation identified a need to distribute visitors and tourist dollars throughout the region and to provide opportunities for Airlie Beach visitors when the weather is bad enough to restrict marine activities. Fly-drive is how many visitors get to and experience the Whitsundays, but there is a lack of developed self-drive routes/experiences. Most communities express a desire to develop local self-drive routes, e.g. 4WD routes; a local heritage trail; a shopping experience/trail; a farm-gate local produce trail. Population ageing and growth, combined with the popularity of caravaning and RV’s, is driving continued expansion in numbers of grey-nomads on the roads. This market could be better targeted/groomed by the Whitsundays. There are also opportunities for cross-regional cooperation, e.g. link Proserpine and Collinsville drive-tourism with Mackay-Isaac region drive-tourism and experiences (discover the hinterland, camping, mining trail, alternative north-south route); fly-drive/hire caravan experience from Mackay or/and Townsville airports. Tourism Queensland and Tourism Whitsundays commissioned a Whitsundays Ecotourism Strategy in 2008. The strategy, focussed on mainland initiatives, is largely un-implemented; which it appears was due to a lack of capacity within the region at the time. A number of issues and suggested projects in the ecotourism strategy align with findings from this DTP process, e.g. the need for mainland product and experiences; product that should be in synergy with the regions natural environment assets; opportunities to grow drive-tourism; potential to grow visitation to the region and/or extend lengths of stay. Some examples of potential projects identified in the ecotourism strategy include;</td>
</tr>
</tbody>
</table>
|             | Brandy Creek canopy walkway  
|             | 4wd opportunities  
|             | Heritage trails (self-drive routes)  
|             | Bird-watching  
|             | Eco-accommodation  
|             | Ecotourism precinct at Bowen  
|             | Collinsville environs experiences  
|             | Peter Faust Dam fishing and kayaking experience  
|             | Eco tour packages  
|             | A wave pool. A developer wants to invest in establishing a Flow House ™ entertainment venue at Airlie Beach. Such a venue may incorporate flow-boarding, food, beverage, retail and events. It would address a need the local tourism industry constantly expresses for, ‘more land-based activities for families and youth’ and ‘something to do when the weather turns foul’. As an international brand and venue capable of hosting international events it would be a significant marketing asset/attraction for the Whitsundays. |
| Alignment with WRC Corporate Plan | ✓ Enhance tourism and entry signage across the Whitsunday Region;  
| | ✓ Partner with tourism, business and economic development organisations to deliver training programs and initiatives for the tourism and small business sectors;  
| | ✓ Partner with tourism, business and economic development organisations to promote the local tourism and small business sectors;  
| | ✓ Promote the Whitsunday Region as a desirable domestic and international tourist destination;  
| | ✓ Promote the continued development of the tourism sector;  
| | ✓ Promote living, investing and shopping locally;  
| | ✓ Encourage the retention of existing local industries and business and the development of emerging industries and businesses;  
| | ✓ Develop and implement policies and strategies that protect and enhance the Whitsunday region’s natural environment; |
| Alignment with the state 20 Year Tourism Plan six strategic directions | ✓ Offering iconic experiences  
| | ✓ Targeting a balanced portfolio of markets  
| | ✓ Delivering quality, great service and innovation  
| | ✓ Building strong partnerships  
| | ✓ Growing investment |
### Strategy Seven
**Grow the number and quality of events across the Whitsundays region**

**Rationale**
WMDL already has and is implementing an Events Innovation Strategy. Within WMDL resources, the organisation is contributing valuably to growing the standard and quality of events in the region. However, the importance stakeholders place on events as a strategy to grow tourism in the Whitsundays, suggests WMDL identify whether they can introduce new strategies; attract additional resources; or engage external partners to grow and fast-track the development of a full program of events across the region. It has been suggested, ‘we have a Season of Sailing, why not a Season of Adventure, a Season of the Arts?’

**Alignment with WRC Corporate Plan**
- Partner with tourism, business and economic development organisations to deliver training programs and initiatives for the tourism and small business sectors;
- Partner with tourism, business and economic development organisations to promote the local tourism and small business sectors;
- Promote the Whitsunday Region as a desirable domestic and international tourist destination;
- Promote the continued development of the tourism sector;
- Encourage the retention of existing local industries and business and the development of emerging industries and businesses;

**Alignment with the state 20 Year Tourism Plan six strategic directions**
- Preserving our nature and culture
- Offering iconic experiences
- Targeting a balanced portfolio of markets
- Delivering quality, great service and innovation
- Building strong partnerships
- Growing investment

### Strategy Eight
**Protect and Promote Whitsundays marine and natural environments**

**Rationale**
There is almost unanimous agreement locally that the tourism industry (employing approximately 3,000 people in the Whitsundays) is based on the region’s unique and relatively pristine marine, island and natural environments. ‘The reef is undergoing death by a thousand cuts. Already we have lost a substantial percentage of the coral cover. Numerous reasons will be cited to do with crown of thorns starfish; riparian water run-off; polluting water; climate change/warming oceans, etc.’, is a view many people hold. Despite this the Great Barrier Reef remains in good condition in comparison to many competing destinations. The region’s competitive advantages include:

- The large amount and diversity of reef/marine environments
- Pristine waters and clean environment
- World Heritage Listing
- 74 islands of which 66 are not developed
- Heart Reef & Whitehaven Beach.

The message is lose our coral, quality of reef and natural environments and we lose our competitive advantage, unique selling position and the base on which the Whitsunday tourism industry is built. It follows that every effort must be made to protect the regions marine and natural environments, clean waters, etc.

The *Whitsundays Tourism Opportunity Plan 2012-2016* identifies a potential project that has been a community aspiration for a number of years, i.e. an Airlie Beach Marine Discovery Centre. Such a facility would be invaluable in industry desires to protect and promote the reef. A feasibility study was completed in 2008 for a state-of-the-art Marine Education Centre and Aquarium that could offer visitors an interpretive facility showcasing the Great Barrier Reef. This concept and related feasibility study needs to be revisited.

**Alignment with WRC Corporate Plan**
- Ensuring a regulatory environment which is business friendly and considerate of business needs
- Promote the Whitsunday Region as a desirable domestic and international tourist destination;
- Promote the continued development of the tourism sector;
- Encourage the retention of existing local industries and business and the development of emerging industries and businesses;
- Develop and implement policies and strategies that protect and enhance the Whitsunday region’s natural environment;
Strategy Nine  
Support tourism industry workforce development

Rationale

A number of workforce issues were raised in project consultation, including the need for;

- Raising customer service standards and local knowledge, e.g. through a Whitsundays induction, ambassadors or local accreditation scheme
- Increasing the supply of both skilled and unskilled tourism and hospitality staff willing to work in regional Australia, e.g. through advocating for an increase in the period backpackers can work when on a working-holiday; programs focussed on transitioning local high school leavers into the local tourism industry
- A need to prepare businesses (e.g. cultural awareness training for customer service staff and management; realignment of product to meet market expectations) in preparation for anticipated growth in visitation from Asian markets (particularly China)
- Development of creative strategies to address difficult issues such as:
  - The transient workforce;
  - Businesses constantly in training mode;
  - A lot of people move to Airlie for lifestyle reasons and have lifestyle attitudes to business, i.e. some may not be as committed to growing their business as one may like?;
  - Staff attraction and retention (particularly on the islands, where leisure and socialising opportunities outside of work are limited. And where some businesses have particular difficulty attracting management staff).

WMDL have produced a draft Whitsunday Workforce Development Plan 2013-2015 targeting the various industry sectors in the region. Ideally this plan should;

- Address the abovementioned issues
- Provide indicative timeframes and list key and supporting stakeholders responsible for actions
- Acknowledge the potential for the Whitsundays to establish a regional tourism training facility and grow recognition of the region as a Regional Tourism Centre of Excellence

Alignment with WRC Corporate Plan

- Ensuring a regulatory environment which is business friendly and considerate of business needs;
- Partner with tourism, business and economic development organisations to deliver training programs and initiatives for the tourism and small business sectors;
- Promote the continued development of the tourism sector;
- Promote living, investing and shopping locally;
- Encourage the retention of existing local industries and business and the development of emerging industries and businesses;

Alignment with the state 20 Year Tourism Plan six strategic directions

- Offering iconic experiences
- Delivering quality, great service and innovation
- Building strong partnerships
- Growing investment
Strategy Ten  Improve industry resilience to the impact of severe weather events

| Rationale | Tidal surges, heavy rain, rough seas and high winds from tropical storms and cyclones can cause occasional road closures, flight delays, power cuts, floods and associated damage; all impacting negatively on the region’s tourism industry. This can occur any time from November to May, but February-March is the most likely time/when the weather is at its worst. The tourism industry needs to continue pursuing strategies aimed at reducing the impact of such weather, including:
- Advocating for flood-proofing of the road between Whitsunday Coast Airport and Airlie Beach-Shute Harbour (and for flood-proofing the Bruce Highway generally)
- The development of a large undercover multi-purpose convention and events centre, which can provide the capacity to hold or move events undercover in inclement weather (and which could possibly also serve as a community emergency evacuation centre when required)
- Identifying whether there are alternative transport options/routes to get visitors to the Airlie Beach precinct when roads are closed/flooded, e.g. by sea, by helicopter
- Avoid the peak cyclone season when staging large events (depending on the nature of the event and target markets)
- Communication and media strategies by WMDL, TEQ, VIC’s and operators (all stakeholders) to counter negative public, e.g. ensuring the message gets out that the region is open for business as usual as soon as the region is accessible

| Alignment with WRC Corporate Plan | ✓ Ensuring a regulatory environment which is business friendly and considerate of business needs
✓ Partner with tourism, business and economic development organisations to promote the local tourism and small business sectors;
✓ Promote the Whitsunday Region as a desirable domestic and international tourist destination;
✓ Promote the continued development of the tourism sector;
✓ Develop and implement policies and strategies that protect and enhance the Whitsunday region’s natural environment;
✓ Advocate for the implementation of the Bruce Highway Action Plan; and
✓ Improve the utilisation of Council owned aerodromes and aviation assets.

| Alignment with the state 20 Year Tourism Plan six strategic directions | ✓ Offering iconic experiences
✓ Targeting a balanced portfolio of markets
✓ Delivering quality, great service and innovation
✓ Building strong partnerships
✓ Growing investment

Strategy Eleven  Establishment international flights into the Whitsunday Coast Airport

| Rationale | Development of Whitsunday Coast Airport as an international airport, with a view to being able to host direct Asia-Whitsundays and NZ-Whitsundays flights. The Whitsunday Regional Council has identified within their Corporate Plan 2014-19 the opportunity to develop the Whitsunday Coast Airport into an International Airport – with specific opportunity out of Asia and New Zealand.
The terminal facility has been recently re-developed to allow for an international configuration.

| Alignment with WRC Corporate Plan | ✓ Ensuring a regulatory environment which is business friendly and considerate of business needs;
✓ Enhance tourism and entry signage across the Whitsunday Region;
✓ Partner with tourism, business and economic development organisations to promote the local tourism and small business sectors;
✓ Promote the Whitsunday Region as a desirable domestic and international tourist destination;
✓ Promote the continued development of the tourism sector;
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✓ Improve the utilisation of Council owned aerodromes and aviation assets.
Alignment with the state 20 Year Tourism Plan six strategic directions

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

Strategy Twelve
Increase engagement by the tourism industry in advocacy and planning activities that impact upon the industry

Rationale
Project research encountered, on numerous occasions, evidence that tourism businesses and communities would benefit from increased engagement with various government agencies and representatives, e.g.;

- At the January 2014 DTP Working Group workshop, a lack of understanding of an agreed tourism industry-residents-council vision for the future of the Airlie Beach-Cannonvale-Shute Harbour district was evident. Issues such as a cap on population/development; the impact of residential growth on tourism assets and development; the restraints/constraints of existing (and near future) sewerage, potable water and roads infrastructure; an economic and urban design master-plan for the district (and region) were raised. (It is noted that the council are focused on development and growth. Council advises that they are currently amalgamating existing old plans to produce a Whitsunday Regional Council Planning Scheme, which will include a Local Area Plan (Urban Design Master Plan) for each town. This should be completed by the end of 2014 and will provide direction on development control/issues);

- Communities lack resources or ability to undertake grass roots tourism development initiatives, e.g. heritage trails, self-drive routes, farm-gate food trail, producers/farmers market, and would benefit from increased government resources directed to hands-on design and implementation of such initiatives; and

- A lack of resources directed to implementing existing strategies, e.g. Whitsundays Eco-Tourism Strategy.

WMDL is has recently produced a draft Whitsunday Workforce Development Plan 2013-2015 and is currently reviewing/updating the Whitsunday Region Economic Development Strategy. Small business, tourism and hospitality businesses are crucial to the regional economy and need to grow the sector they need to be aggressive in engaging in the development of related plans.

Industry members need to be putting their views forward about their desires for the future, to ensure the industry has the best chance possible in;

- Maximising product development opportunities;

- Realizing such visions as establishing a regional tourism training facility and growing recognition of the region as a Regional Tourism Centre of Excellence, or for the Whitsunday Coast Airport to become an international airport;

- Investment attraction, and

- Successfully managing change and adjusting to ever-changing consumer preferences.

Alignment with WRC Corporate Plan

- Ensuring a regulatory environment which is business friendly and considerate of business needs
- Partner with tourism, business and economic development organisations to deliver training programs and initiatives for the tourism and small business sectors;
- Promote the continued development of the tourism sector;
- Encourage the retention of existing local industries and business and the development of emerging industries and businesses;

Alignment with the state 20 Year Tourism Plan six strategic directions

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

International Access to the Whitsunday Coast Airport

Development of major events centre incorporating a significant business events venue

Investment in Events as a driver for visitation growth.

Development of Integrated Resort Development
### Strategic Priorities And Actions To 2020

**Strategy One - Take advantage of population growth in the immediate and greater region (Galilee and Bowen basins, Townsville, etc.) by maximising opportunities to grow day-trip, short-break and VFR visitation to the Whitsunday region**

<table>
<thead>
<tr>
<th>Action</th>
<th>KPI/Target</th>
<th>Lead Organisation</th>
<th>Partner Organisations</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 Annually monitor and review regional and surrounding regions population growth and demographic changes/trends</td>
<td>Annual review undertaken</td>
<td>WMDL</td>
<td>WRC; DSDIP</td>
<td>2014-2020</td>
</tr>
<tr>
<td>1.2 Develop and run innovative new marketing campaigns targeting VFR markets, short-break markets and conversion of day-trip markets to overnight stays.</td>
<td>24% growth in domestic visitor numbers from 2013 to 2020</td>
<td>WMDL</td>
<td>local business chambers of commerce; Tourism Bowen; individual businesses</td>
<td>2014-2020</td>
</tr>
<tr>
<td>1.4 Strategically market new and existing events in a way to stimulate the 400km radius market.</td>
<td>24% growth in domestic visitor numbers from 2013 to 2020</td>
<td>event organising committees</td>
<td>WMDL; Tourism Bowen</td>
<td>2014-2020</td>
</tr>
</tbody>
</table>

**Strategy Two - Refocus regional marketing initiatives to improve performance/attract more visitors from southern, interstate and eastern seaboard markets, in particular Melbourne, Sydney and N.Z. markets**

<table>
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<tr>
<th>Action</th>
<th>KPI/Target</th>
<th>Lead Organisation</th>
<th>Partner Organisations</th>
<th>Timeframe</th>
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</thead>
<tbody>
<tr>
<td>2.1 Develop and deliver innovative increased brand, tactical and marketing activity in partnership with TEQ and industry that drives improved performance from southern, interstate and eastern seaboard target markets, in particular Melbourne, Sydney and N.Z. markets.</td>
<td>24% growth in domestic visitor numbers from 2013 to 2020; increase in domestic average $ spend/night from $269 in 2012-13 to $333 in 2019-20; doubling of NZ visitor numbers from 8,000 in 2012-13 to 16,000 in 2019-2020</td>
<td>WMDL</td>
<td>TEQ; individual businesses; Tourism Bowen</td>
<td>2014-2016</td>
</tr>
<tr>
<td>2.1 Review research data and consult with the local industry, to develop strategies to improve both the rates of repeat visitation and the rate of recommendations by preferrers</td>
<td>5% annual increase in repeat visitation</td>
<td>WMDL</td>
<td>TEQ; individual businesses; Tourism Bowen</td>
<td>2014-2020</td>
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</table>

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

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<tbody>
<tr>
<td>3.1 Develop an industry toolkit that assists operators to amplify the experiences of the Great Barrier Reef and other key, competitive nature based assets in context of the destination brand</td>
<td>50% of WMDL membership utilising brand toolkit assets</td>
<td>WMDL</td>
<td>individual businesses; TEQ</td>
<td>2014-2015</td>
</tr>
<tr>
<td>3.2 Continue to work with the industry and community to align marketing communications to the destination brand</td>
<td>Conduction 4 brand updates per annum on the use of brand and brand assets</td>
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<tr>
<td>3.3 Undertake annual marketing activity that reinforces Airlie Beach’s proximity to the Great Barrier Reef and Islands within the context of the regional brand attributes and values in collaboration with industry and the community</td>
<td>A minimum of $200,000 in generated PR Value annually</td>
<td>Airlie Beach Chamber of Commerce and SKAL</td>
<td>individual businesses; WMDL</td>
<td>2014-2020</td>
</tr>
<tr>
<td>Action</td>
<td>KPI/Target</td>
<td>Lead Organisation</td>
<td>Partner Organisations</td>
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<tr>
<td>4.2</td>
<td>Revisit the Whitsundays Heritage Trails Development Plan 2010-15 with a view of developing and implementing an action plan designed to grow cultural and heritage tourism across the region. Particular attention should be placed on prospects at Proserpine, Collinsville and Bowen; community and special events; and Indigenous culture.</td>
<td>WMDL</td>
<td>community stakeholders; WRC; Queensland Museum, Arts QLD, Chambers of Commerce</td>
<td>2015</td>
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</table>

**Strategy Five - Support the development of major tourism projects that will enhance the visitor experience and appeal of the region**

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<tr>
<th>Action</th>
<th>KPI/Target</th>
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<th>Timeframe</th>
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<tbody>
<tr>
<td>5.1</td>
<td>Advocate for the development of additional new or existing fully integrated brand name resort developments within the region.</td>
<td>WRC</td>
<td>WMDL; individual businesses; DSDIP</td>
<td>2014-2020</td>
</tr>
<tr>
<td>5.2</td>
<td>Advocate for the development of an Events Centre to be located in Airlie Beach that provides a business events, cultural and entertainment precinct.</td>
<td>WMDL</td>
<td>TEQ; WRC; DSDIP</td>
<td>2014</td>
</tr>
<tr>
<td>5.3</td>
<td>Advocate for and provide facilitation assistance (as applicable) for the establishment of a Flow House entertainment venue at Airlie Beach.</td>
<td>DSDIP</td>
<td>WMDL, WRC; individual businesses; Airlie Beach Chamber of Commerce</td>
<td>2014-2020</td>
</tr>
<tr>
<td>5.4</td>
<td>Pursue opportunities to develop a Regional Cycle and Footpath Strategy and a Whitsunday Region Open Space and Recreation Strategy.</td>
<td>WRC as key implementing agency</td>
<td>Qld Health; DNPRSR (Sport &amp; Rec); WMDL as advocate; TEQ</td>
<td>2016-2020</td>
</tr>
<tr>
<td>5.5</td>
<td>Implement recommendations from the Regional Cycle and Footpath Strategy and Whitsunday Region Open Space and Recreation Strategy.</td>
<td>WRC</td>
<td>WMDL; Events organisers; Qld Health; DNPRSR (Sport &amp; Rec); TEQ</td>
<td>2016-2020</td>
</tr>
<tr>
<td>5.6</td>
<td>Build demand for air travel from domestic source markets to the destination via Whitsunday Coast and Hamilton Island Airports</td>
<td>WRC, WMDL, TEQ</td>
<td>individual businesses; DSDIP</td>
<td>2014-2020</td>
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</table>

**Strategy Six - Support the development of new product and experiences that encourage distribution of visitors and tourist dollars throughout the region**

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<thead>
<tr>
<th>Action</th>
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<th>Lead Organisation</th>
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<th>Timeframe</th>
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<tbody>
<tr>
<td>6.1</td>
<td>Establish a Working Party to review the Whitsundays Ecotourism Strategy (2008) and develop and implement the action plan.</td>
<td>WMDL</td>
<td>DNPSRR (QPWS); TB; WRC; DSDIP</td>
<td>early-mid 2014, mentation 2015 onwards</td>
</tr>
</tbody>
</table>
6.2 Develop and implement the development of a series of self-drive trail brochures (joint use as web content) for the Whitsundays region. (Note: A 4WD trail plan as identified in the Whitsundays Ecotourism Strategy should be part of considerations)

Self-drive trails brochures finalised and distributed

WMDL

TB; Proserpine Chamber of Commerce; WRC; community volunteers; local history groups

2015-2016

6.3 Pursue opportunities to develop roadside rest areas, limited time free-camp camp areas, interpretation signage, etc. that support the regions ability to attract and retain grey nomad, RV and caravanning markets

Road-side rest areas, limited time free-camp camp areas, interpretation signage, etc facilities established;
24% growth in domestic visitor numbers from 2013 to 2020; growth in domestic visitor average length of stay from 6.23 nights in 2012-13 to 6.9 nights in 2019-20; growth in international visitor average length of stay from 7.12 nights in 2012-13 to 7.5 nights in 2019-20; etc.

WRC

communities and chambers of commerce; Tourism Bowen; WMDL, DTMR, DETSB

2014-2020

6.1 Pursue opportunities to develop touring routes, product and packages (either alone or in conjunction with adjoining regions) that attract visitation from adjoining regions (and/or encourage greater visitation to the broader region); e.g. fly-RV or caravan hire; a Mackay- Townsville touring route

24% growth in domestic visitor numbers from 2013 to 2020; growth in domestic visitor average length of stay from 6.23 nights in 2012-13 to 6.9 nights in 2019-20; growth in international visitor average length of stay from 7.12 nights in 2012-13 to 7.5 nights in 2019-20; etc.

WMDL

Adjoining RTO’s; individual businesses, DTMR, DETSB.

2014-2020

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

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<thead>
<tr>
<th>Action</th>
<th>KPI/Target</th>
<th>Lead Organisation</th>
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<tbody>
<tr>
<td>7.1</td>
<td>Continue to implement the WMDL Events Innovation Strategy 2011-2015 and commit to undertaking a review of this strategy in 2015 to identify new opportunities moving forward.</td>
<td>WMDL</td>
<td>Events organising groups; TEQ; chambers of commerce; Tourism Bowen</td>
<td>2014-2019</td>
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<tr>
<td></td>
<td>2-3 new Significant Events added to regional calendar by 2020; All funded events reaching or exceeding attendance and sponsorship targets; One Capacity building workshop per annum to assist in building skills of events organisers; 10 New events established</td>
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<tr>
<td>7.2</td>
<td>Pursue the development of a standalone event management and marketing organisation (as identified in the Tourism Whitsundays Events Innovation Strategy 2011-2015). The role of this organisation should be to represent the events industry, provide overall events coordination, practical operations and to liaise with WMDL, WRC, TEQ, the community, tourist operators and local businesses. It should be the voice of local events, to enhance local skills, help raise sponsorship levels, focus on major events and to improve event scheduling during variable seasonal activities for the benefit of visitors and local operators by ensuring more predictable tourism trading patterns</td>
<td>WMDL</td>
<td>Events organising groups; TEQ; chambers of commerce; Tourism Bowen</td>
<td>2015-2016</td>
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<tr>
<td></td>
<td>Develop a business plan and management structure for a stand-alone organisation; Attract funding to establish the organisation.</td>
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<tr>
<td>7.3</td>
<td>Attract additional events seed funding to support new and emerging events</td>
<td>New Whitsundays Events organisation</td>
<td>Events organising groups; WRC; TEQ; chambers of commerce; WMDL</td>
<td>2015-2020</td>
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<td></td>
<td>3 new events per year supported</td>
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<tr>
<td>Strategy Eight - Protect and promote Whitsundays marine and natural environments</td>
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<td>KPI/Target</td>
<td>Lead Organisation</td>
<td>Partner Organisations</td>
<td>Timeframe</td>
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<tr>
<td><strong>8.1</strong> Advocate to politicians, governments and industries for the protection of the region’s marine and natural environments</td>
<td>Increased funding for identified environmental outcome projects</td>
<td>Individual businesses, residents and visitors</td>
<td>WRC; WMDL; GBRMPA; DNPSRR (QPWS); DSDIP</td>
<td>Ongoing</td>
</tr>
<tr>
<td><strong>8.2</strong> Develop and implement a new marketing campaign focussing on the theme Promoting Whitsundays Unique Biosphere (marine and natural environments)</td>
<td>3% annual increase in visitation to National Parks within the region</td>
<td>WMDL</td>
<td>individual businesses; Tourism Bowen; WRC; GBRMPA; DNPSRR (QPWS);</td>
<td>2014-2016</td>
</tr>
<tr>
<td><strong>8.3</strong> Pursue opportunities to develop an Airlie Beach Marine Discovery Centre (see the 2008 feasibility study for a state-of-the-art Marine Education Centre and Aquarium that could offer visitors an interpretive facility showcasing the Great Barrier Reef)</td>
<td>Development of an Airlie Beach Marine Discovery Centre</td>
<td>WMDL</td>
<td>WRC, WMDL; GBRMPA; DNPSRR (QPWS); DSDIP; industry partners</td>
<td>2018-2020</td>
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<tr>
<th>Strategy Nine - Support tourism industry workforce development</th>
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<tbody>
<tr>
<td><strong>Action</strong></td>
</tr>
<tr>
<td><strong>9.1</strong> Initiate/facilitate discussions with TAFE, Qld universities and the Whitsundays tourism industry to scope options, opportunities and challenges associated with a view to developing and implementing a centre of excellence (or similar concept) in regional tourism training.</td>
</tr>
<tr>
<td><strong>9.2</strong> Develop and implement the key actions of a Whitsunday Workforce Development Plan</td>
</tr>
<tr>
<td><strong>9.3</strong> Facilitate the implementation a range of customer service initiatives to increase the level of customer satisfaction.</td>
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</tbody>
</table>
### Strategy Ten – Improve industry resilience to the impacts of severe weather events

<table>
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<tr>
<th>Action</th>
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<th>Lead Organisation</th>
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<tbody>
<tr>
<td>10.1</td>
<td>Advocate for flood-proofing of the road between Whitsunday Coast Airport and Airlie Beach-Shute Harbour (and for flood-proofing the Bruce Highway generally)</td>
<td>Increased funding for road infrastructure.</td>
<td>WRC; WMDL; chambers of commerce; Tourism Bowen</td>
<td>2014-2020</td>
</tr>
<tr>
<td>10.2</td>
<td>Avoid the peak cyclone season when staging large events (depending on the nature of the event and target markets)</td>
<td>No major events scheduled between Jan - April</td>
<td>Event organisers</td>
<td>2014-2020</td>
</tr>
<tr>
<td>10.3</td>
<td>Ensuring stronger collaboration in communication and media strategies during time of natural disasters, e.g. ensuring the message gets out that the region is open for <em>business as usual</em> as soon as the region is accessible</td>
<td>Partner with relevant agencies to develop a regional risk management plan and communications plan</td>
<td>WRC; WMDL; VIC’s; individual businesses; TEQ</td>
<td>2014 / reviewed annually</td>
</tr>
<tr>
<td>10.4</td>
<td>Partner with relevant agencies to identify and report economic impacts and severe weather events</td>
<td>Develop a business impact analysis tool that can be rapidly implemented following severe weather events.</td>
<td>WMDL; individual businesses</td>
<td>2014-2015 / reviewed annually</td>
</tr>
</tbody>
</table>

### Strategy Eleven – Establishment international flights into the Whitsunday Coast Airport

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<th>Action</th>
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<tbody>
<tr>
<td>11.1</td>
<td>Advocate international route development for the Whitsunday Coast Airport in line with WRC plans for this to become an integrated transport hub</td>
<td>3 new businesses located integrated transport hub at Whitsunday Coast Airport</td>
<td>WRC; WMD, DSDIP</td>
<td>2014-2020</td>
</tr>
<tr>
<td>11.2</td>
<td>Build demand for a Whitsunday holiday with international target markets (and visitation) to support the business case for development of a Whitsunday Coast Airport as an international airport with emphasis on Asian and NZ opportunities</td>
<td>Annual 10% increase in marketing activity in China and New Zealand compared to 2013 levels.</td>
<td>WMDL; WRC, individual businesses</td>
<td>2014-2020</td>
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### Strategy Twelve - Increase engagement by the tourism industry in advocacy and planning activities that impact upon the industry

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<tr>
<td>12.1</td>
<td>Advocate for WMDL members, chambers of commerce, event organisers, individual tourism and other business that benefit from tourism, to be more actively involved in advocacy and planning that does, or is likely to, impact on the industry</td>
<td>Tourism industry issues are incorporated in local, regional, state and national strategies and plans; increased resource allocation to the Whitsundays tourism industry; increased community recognition and support for the industry</td>
<td>WMDL; chambers of commerce; Tourism Bowen; individual businesses</td>
<td>2014 and ongoing</td>
</tr>
</tbody>
</table>
Table Of Acronyms

- BCE – Bowen Collinsville Enterprise;
- GBRMPA – Great Barrier Reef Marine Park Authority;
- DNPRSR – Department of National Parks, Recreation, Sport and Racing;
- DDSIP – Department of State Development, Infrastructure and Planning;
- DTESB – Department of Tourism, Events and Small Business;
- DTMR – Department of Transport and Main Roads;
- REDC – Mackay Isaac Whitsundays Regional Economic Development Corporation;
- ROC – Whitsunday Region Organisation of Councils
- TB – Tourism Bowen
- TEQ – Tourism and Events Queensland
- VIC – Visitor Information Centres
- WMDL – Whitsundays Marketing and Development Ltd;
- WRC – Whitsunday Regional Council.

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- WHITSUNDAYS TOURISM PROFILE AVERAGE ANNUAL DATA FROM YEAR ENDING DECEMBER 2009 TO DECEMBER 2012 - Tourism and Events Queensland (2013)

Photos on page 6 qnd IS .. courtesy of Ziggy Ziegler Photography
Appendix A – Explanation Of Megatrends
(Extract from ‘The Future of Tourism in Queensland – Megatrends, Creating Opportunities and Challenges over the coming twenty years’; author - CSIRO (2013))

1) **The Orient Express** – The world economy will significantly change over coming decades. Rapid income growth within emerging economies will create new markets and new sources of competition. Major growth opportunities are associated with attracting new tourists from the developing Asia region and ensuring Queensland is a differentiated and aspirational destination for domestic and international travellers.

2) **A Natural Advantage** – Global biodiversity and natural habitats are disappearing at alarming rates. Those areas of remaining pristine natural habitats are of increasing value. As the world’s population grows and becomes increasingly urbanised, tourists will be drawn to nature-based experiences. Queensland’s natural assets will become an increasingly important drawcard for locals and visitors alike.

3) **Great Expectations** – As incomes grow, people shift their discretionary expenditure towards experiences as opposed to products. The experiences future tourists will seek will be ‘authentic’ to the destination and its people, personalised and often involve social interaction and emotional connection.

4) **Bolts from the Blue** – Sudden and hard to predict events such as extreme weather and infectious disease outbreaks have greater likelihood in a world with a changed climate, antimicrobial drug resistance and increased human mobility. When combined with the growing importance of safety perceptions, these events will have both positive and negative impacts on Queensland tourism expenditure depending on where they occur in the world and the perceptions potential travellers have regarding their impacts.

5) **Digital Whispers** – In the digital age, models of human communication and decision making are changing over time. Information flows much more rapidly and via widely distributed channels. The perceived credibility of information sources is also changing. The online world has created new risks and opportunities for the tourism sector.

6) **On the Move** – People are becoming increasingly mobile. While leisure remains a strong motivator for travel, people are travelling further and more frequently for many reasons such as trade, business, events, conferences, education and healthcare. Technological advances in the transport sector, particularly aviation, will enable the continued rise in mobility as people are able to move greater distances, faster.

7) **The Lucky Country** – Queensland and Australia have travelled through the financial turbulence of the last decade exceptionally well compared to many other wealthy countries. Australia and Queensland are expensive destinations. Local tourism operators face higher costs than many overseas competitors.
Appendix B - Summary Of DestinationQ 20 Year Plan ‘Six Key Themes’
(From Queensland tourism 20-year plan Consultation Workbook (2013); Department of Tourism, Major Events, Small Business and the Commonwealth Games)

1. preserving our nature and culture
   • Natural assets will continue to be the heart of the Queensland experience—able to be enjoyed by visitors and locals alike, and preserved for future generations.
   • Our unique, authentic character and cultural heritage will be preserved and enhanced, and will always be at the heart of the Queensland experience.

2. offering iconic experiences
   • We will focus on the consumer, and the experiences we offer will create lifelong memories.
   • Our destinations will build on and leverage their strengths and heroes—iconic people, places and events—giving visitors many reasons to stay, explore and return.
   • Our hero experiences and icons are our points of difference, and this is what we will showcase.

3. targeting a balanced portfolio of markets
   • Visitors from Australia and around the world will aspire to visit our destinations many times, exploring the diversity of our state.
   • We will target a balanced portfolio of markets that match our competitive strengths and deliver the best results for our destinations.
   • We will always look to the future, understanding and acting on consumer trends to appeal to traditional markets and grow new markets.

4. delivering quality, great service and innovation
   • We will deliver authentic, quality experiences with a local feel and high standard of service, showcasing the best of the Queensland spirit—friendly, welcoming and down to earth.
   • Our industry will be led by career-oriented professionals who are passionate about tourism and their communities.
   • Our operators will be technologically smart, connected and efficient, doing business better and reaching consumers in new and innovative ways.

5. building strong partnerships
   • Industry and governments will work in partnership at all levels, unified in their approach to support the growth of tourism.
   • The tourism industry will have strong leadership that works collaboratively across other industries, with communities and towards a common long-term vision.
   • The community will be ambassadors for tourism, welcoming visitors and recognising the benefits that the industry brings to Queenslanders.

6. growing investment
   • The ability of the industry to invest and innovate will be encouraged through the continued reduction of unnecessary red tape.
   • Well-planned, timely public and private infrastructure will enable tourism growth and visitor access.
Appendix C - TEQ Market Segments

**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.

**Stylish Travellers** - A holiday is a chance to demonstrate their achievements both to themselves and others. They do this by seeking out unique and exotic experiences and products, making them feel discerning, stylish and successful.

**Self-Discoverers** – Holidays are about discovery, nourishment and enrichment of the self (physically and intellectually). They seek to immerse themselves in holiday experiences that deliver this, gaining insight or a sense of well-being.

**Unwinders** – For Unwinders, holidays are all about relaxation and release, focusing on themselves as an escape from their busy lives. They seek an unstructured holiday. Decisions are made when at the destination. This allows them to catch their breath, feel calm and peaceful and gain perspective.

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

**Social Fun-seekers** - The essence of their holiday is having a fun time. While they do a lot of different activities, it’s sharing the experience with friends and other holidaymakers that makes the difference.
TOP OPPORTUNITIES

1. Regional population growth

Issues or opinions raised during project research and consulting include:

- Queensland Trade and Treasury Office of Economic and Statistical Research Population and Dwelling Profiles (April 2012 Update publications) project that the populations of the following LGA areas will rise between 2011 and 2020 as follows (low series projections):
  - Whitsunday R.C. from 35,000 to 42,000
  - Isaac R.C. from 23,000 to 29,000
  - Townsville from 190,000 to 220,000
  - Mackay from 121,000 to 150,000
  - Rockhampton from 117,000 to 137,000
  - Central Highlands (Emerald) from 32,000 to 38,000
- So that is a projected 98,000 (approx. 20%) population increase from 518,000 in these areas to 616,000.
- The implication is that the Whitsunday region as a key marine/coastal playground in the region, is well placed to significantly increase visitation and expenditure in the day-trip, short-break and VFR markets.
- An argument could be made that this projected growth could account for over $18 million in extra day-trip expenditure annually and an extra $45 million in extra VFR market expenditure annually by 2020 (based on VFR being 19% of domestic overnight stays and 3% of International overnight stays).
- Population increases within the Whitsundays region are required to grow the rate base and contribute to the financial viability of the Whitsunday Regional Council and enable it to undertake essential infrastructure projects.
- A growing local population provides opportunities for tourism industry workforce training, recruitment and development.
- A growing local population is a resource that can be actively engaged in tourism development, e.g. running events and festivals; volunteering; ambassadors; community-economic development.
- We need to ensure ongoing social infrastructure development to support/match population growth.

2. Optimise the regions marketing outcomes

Issues or opinions raised during project research and consulting include:

- Need to fine tune the Whitsundays brand so as to maximise exposure of the brand.
- Make more of icons like Heart Reef and Whitehaven Beach and Airlie as a gateway to the Great Barrier Reef.
- Increase the exposure of Bowen, Proserpine and Collinsville e.g. snorkelling at Bowen coastal reefs is relatively unknown.
- Increase the exposure of existing and potential air access routes into the region.
- There are opportunities to improve performance/attract more visitors from Melbourne, Sydney, N.Z. and Townsville markets. The region is not performing as well as some other Qld regions.
- Difficulties associated with some strata title accommodation properties capacity to undertake or contribute to marketing initiatives (time, budget, focus).
- Some businesses that attract patronage straight off the street may not contribute to regional marketing efforts.
- Are we spreading our marketing resources too thinly? (rather than targeting where the most impact/difference can be made).
- Internationals flying into Cairns and Brisbane/Gold Coast. We need to figure out a way to then get them from there to the Whitsundays.

3. Product and Facilities development

Issues or opinions raised during project research and consulting include:

- There is a need for more land-based activities for families and youth.
- A multi-purpose convention centre at Airlie Beach is needed to host large events and provide an undercover venue during inclement weather. This will present an opportunity to boost mid-week occupancy rates.
- A developer is interested in establishing a Flow House™ at Airlie Beach next to the artificial lagoon.
- Approval of a Casino Licence (Hamilton or Airlie) will drive up visitation and new markets.
- Mountain biking and cycle tourism is a growth opportunity.
- Airlie would benefit from a full service internationally branded hotel (e.g. Sheraton, Sofitel) as a contrast to self-contained apartment style accommodation, an attraction to wealthier international visitors and to provide another level of marketing of the Whitsundays.
- High quality agriculture and horticulture produce presents opportunities for agri-tourism, e.g., a farmers market at Bowen or a tourist food trail.
- Airlie would benefit from Marine Education Centre/Discovery Centre.
- Take advantage of opportunities to work cross regionally, to avoid duplication; create stronger product/experiences; encourage longer lengths of stay in the region; etc.
- New product and experiences at Bowen could include ‘turtle tagging’; a safe swimming/snorkelling trail, new cafes and dining experiences.
### 4. Events Development

Issues or opinions raised during project research and consulting include:

- Bowen PCYC is a great venue that could be better utilised.
- Proserpine Entertainment Centre is underutilised as an events and conference venue.
- Local food/produce, local arts and crafts, etc. markets provide opportunities to expand/promote local products and culture.
- Mackay Entertainment Centre is a modern large conference venue. There may be some opportunities for Mackay and Whitsundays to work together, e.g. Whitsundays as a post or pre event destination.
- Collinsville, Bowen and Proserpine have all identified the need for more events to contribute to local economic development.
- Collinsville sees the acquisition of club events as an industry growth opportunity, e.g. state championships for horse riding, pig shooting, archery.
- WMDL already has an Events Innovation Strategy and is facilitating growth in the number and quality of Whitsunday region events.
- Many stakeholders emphasise the need to continue to grow new events, i.e. fill the Whitsundays Events Calendar and attract new interest markets.
- The recent Chinese New Year week at Airlie Beach was reported as a great success, apart from the weather. It has been suggested it may be better looking at “Golden Week” in October for a Chinese focussed event (when the weather is better).
- There are plans to develop “a month of extreme sport’ (mountain biking, running events, endurance events, ‘Tough Mudder’).
- The synergy between the natural beauty (environment) and health (healthy living/lifestyles) is a great opportunity.

### 5. Developing Drive Tourism

Issues or opinions raised during project research and consulting include:

- Opportunities for cross regional cooperation, e.g. fly-drive/hire caravan experience from Mackay or/and Townsville airports.
- There is a need to distribute visitors throughout the region and to provide opportunities for Airlie visitors when the weather is bad enough to restrict marine activities.
- There are opportunities to develop self-drive trails and 4WD routes (present history, heritage, culture, etc.).
- Proserpine has potential for the development of local heritage trail and a shopping experience/trail.
- Population ageing and growth, combined with the popularity of caravanning and RV’s, is driving continued expansion in numbers of grey-nomads on the roads.
- Proserpine and Collinsville are interested in developing new free-camping facilities.
- A multi-story car-park for Airlie has been suggested.
- Periodic closure/flooding of the Proserpine-Airlie-Shute Harbour Road is a concern for part of the year.
- Opportunities to link Proserpine and Collinsville drive-tourism with Mackay-Isaac region drive-tourism and experiences, e.g. discover the hinterland, camping, mining trail, alternative north-south route.
- Increases in popularity of fly-drive tourism due to cheap airfares.
- Opportunities to grow the shoulders of the winter drive-tourism season.
- Road infrastructure lacks touring circuits and loops.
## TOP CHALLENGES

### 13 Threats to and decline in our marine and natural environment

Issues or opinions raised during project research and consulting include

- The reef is undergoing death by a thousand cuts’. Already it has lost a substantial percentage of coral cover. Numerous reasons will be cited to do with crown of thorns starfish; riparian water run-off polluting water; climate change/warming oceans, etc.

- What you will find is as the reef is lost, activities will evolve from below water (diving, snorkelling) to above water (jet skis, sailing, surfing, etc.) and land-based activities. We will become more homogenous!

- We are losing fringe reefs!

- It is the only place in the world where there is such reef in such quality and quantity!

- Trading on our natural assets is the key!

- The key reason people come to the Whitsundays is to see the Great Barrier Reef and an Island experience!

- The synergy between our natural beauty (environment) and health (healthy living/lifestyles) is a great opportunity.

- The regions key direct competitors are

  - Cairns
  - Southern Great Barrier Reef
  - Bali
  - Fiji
  - Vanuatu

- The DTP Working Group identified the regions USP’s include

  - A large amount of reef
  - Pristine waters
  - Clean environment
  - World Heritage Listing
  - Greater marine diversity
  - Inner coral shelf/reefs
  - 74 islands of which 66 are not developed
  - Heart Reef & Whitehaven Beach
  - More National Parks and Walking Trails

- The message is lose our coral, quality of reef and natural environment and we lose our competitive advantage, unique selling position and the base on which the Whitsunday tourism industry is built

- There was a 2008 feasibility study for a state-of-the-art Marine Education Centre and Aquarium that could offer visitors an interpretive facility showcasing the Great Barrier Reef

### 14 High cost of doing business in Australia

Issues or opinions raised during project research and consulting include

- The high $A that followed the GFC seriously impacted on local tourism with significant reduction in numbers of backpackers visiting Australia. This combined with many Australians taking cheap overseas holidays rather than holidaying at home. The past year has seen a return of European backpackers as the $A has weakened and exchange rates improved for inbound visitors.

- Local tourism industry is unable to compete with high wages on offer in the mining/resources industry

- General high wages in Australia contribute to high construction/development costs and high cost to refurbish infrastructure

- A full range of business input costs are high in Australia, meaning that to ‘turn a profit’ product (tours, accommodation, food, etc.) is expensive in comparison to many overseas competitors

- Island businesses have additional high costs, i.e. no access to mainland infrastructure and services, so having to provide their own; additional staff attraction and housing costs; additional freight and people transport costs

- The region is unable to compete on cost (cheapest price) so must position itself to compete on the basis of ‘best value for money’

### 15 Impacts of severe weather events

Issues or opinions raised during project research and consulting include

- Occasional cutting of the Proserpine/Whitsunday Coast Airport to Airlie Beach road during extreme weather events (cyclones, flooding) disrupts (brings to a standstill) the local tourism industry. The issue is that key to the Airlie-Islands tourism industry are the back-packer market (who generally access the region by road/coach or air) and the higher yield markets who access the region by air, but must get from Whitsunday Coast Airport (Proserpine) by road to the Airlie Beach district.
- The Proserpine to Airlie-Shute Harbour Road is the only road in and out of the key tourist precinct. Once it is cut both visitors and residents are stuck!

- Cyclical events can result in extensive physical damage to the region and financial cost to residents and government, impacting on tourism industry viability whilst repairs, renovations and rejuvenation of the environment take place.

- Media coverage of extreme weather events engenders perception with consumers (and much of the trade as well) that the region is not accessible or 'out of bounds', when in fact access delays may only be temporary. The message that it is 'business as usual' is a challenge to convey when mass media has 'painted an alternative picture'!

- Even though the weather in the wet season is often beautiful for visitors, unpredictability of cyclonic events does make difficult planning major events and festivals in this period.

### 16 Lack of mainland product and activities

Issues or opinions raised during project research and consulting include

- issues when the weather is poor (finding activities other than marine based)
- A lack of leisure oriented attractions and activities that are mainland based
- Inability to secure investment (for major tourist and community infrastructure developments)
- Lack of population or tourist numbers to encourage new cafes, al fresco dining experiences, etc. (Bowen)
- Glut of strata title investment in accommodation (negates appeal to a single investor of a new hotel at Airlie)
- Lack of a convention facility at Airlie to host 500 plus people
- No camping options at Proserpine for the RV – free camping market, i.e. to encourage people to stay and discover what the community has to offer (Note: there is a caravan park but no free camp site)
- Challenges for Bowen, Proserpine and Collinsville to get people to travel from Airlie to explore the region
- Need more mainland activities for families and youth
- Excessive ‘red tape’ can be a deterrent to potential developers
- Many businesses still open 5 ½ days a week and not attuned to tourist hours (7 days a week) (Bowen)
- Inadequate numbers of established/mature community ('grass roots') product, e.g. history and heritage trails; tourist drives; farmers or producers markets; arts and crafts exhibitions

### 17 Attracting, developing and retaining a skilled workforce

Issues or opinions raised during project research and consulting include

- Limited supply of both skilled and unskilled tourism and hospitality staff (willing to work in regional Australia)
- Forecast increasing shortages in supply of labour (particularly skilled) outstripping population growth in the Whitsundays
- Customer service standards don’t meet some tourist expectations!
- There is a need to train customer service staff and management in preparation for anticipated growth in visitation from Asian markets (particularly China)
- Staff retention is a big issue, perhaps given to the nature of casual work and the transient nature of the workforce. If you are here 4 months you are considered a local!
- The transient workforce is an issue because when times are tough and casuals are getting less paid hours of work, they can simply leave and move on to where there may be more hours available
- Many workers are backpackers on working holidays so are limited to working only a few months
- Businesses are constantly in training mode!
- A lot of people move to Airlie for lifestyle reasons and have lifestyle attitudes to business, i.e. some are not as committed to growing their business as one may like?
- Local tourism industry is unable to compete with high wages on offer in the mining/resources industry
- Population growth will provide local employment solutions for the tourism industry, assisting to alleviate current issues of transient casual workforce leaving the area when work hours decrease
- Liveability of the region needs to be promoted as part of workforce attraction and development
- The regions should aim to have a regional tourism education/training facility, i.e. the Whitsundays should seek to be recognised as a regional tourism centre of excellence
- Both staff attraction and retention is particularly an issue on the islands, where leisure and socialising opportunities outside of work are limited
- Some island businesses have particular difficulty attracting management level workers
Thank you to all of our partners and the stakeholders who contributed to the development of this Whitsundays Destination Tourism Plan, including:

- Tourism and Events Queensland
- Whitsunday Regional Council
- Qld Dept State Development Infrastructure and Planning
- Qld Dept of National Parks, Sport, Recreation and Racing
- Qld Dept Transport and Main Roads
- Great Barrier Reef Marine Park Authority
- Tourism Bowen
- Bowen Collinsville Enterprise
- Proserpine Chamber of Commerce
- Whitsundays Marketing and Development Ltd industry members

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