

CASSOWARY COAST REGION TOURISM STRATEGY

love the place we live

A Tropical Coast Tourism blueprint for tourism development and industry support in the Cassowary Coast Region into the next generation based on growing a vibrant tourism economy, recognising tourism as a gateway for regional prosperity, enabling the community to 'love where you live' recognising the Cassowary Coast as its own destination. This is a Draft Tourism Strategy for consultation purposes.

QUALITY INFORMATION

Document: Cassowary Coast Region Tourism Strategy
 Purpose: Provide a guiding document for the Cassowary Coast Region, peak tourist industry body and Local Tourist Organisation (LTO); provide the basis to inform a Cassowary Coast Regional Council Tourist Development Strategy

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REVISION HISTORY

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| 2.4 | | Finalisation for industry/public consultation and subsequent Taskforce review | |
| 3.0 | | Final strategy for publication | |



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CHAIRPERSON'S MESSAGE

The Cassowary Coast Regional Tourism strategy represents a landmark in tourism representation and collaboration in the Cassowary Coast and adjoining regions and heralds a new direction for the industry that will enable it to respond in a contemporary and more unified manner to global, national and inter-regional influences affecting the region's tourism potential.

The strategy is the culmination of work undertaken by a TCT established taskforce consisting of TCT Board and regular members and Cassowary Coast Regional Council (Council) staff members who also facilitated the strategy preparation process. The establishment of the taskforce and much of the facilitation of informed discussion and contributions by industry representatives has been made possible through the stewardship of the recently outgoing Chairperson of the TCT Board – Mr Mark Evans who is a passionate advocate for tourism within the region and who has a significant stake in an iconic tourist establishment within the region.

The strategy provides a much needed tool to help set TCT's compass for its representation of the industry at a time when the organisation is experiencing a change in its leadership of its Board. It is a time where it is more evident than ever before that the region needs to consolidate its tourism management and planning resources, work more closely in partnership with the local Council and other government and industry stakeholders in reshaping the industry and tourism products it offers into a destination in its own right.

The Cassowary Coast region is one that I and all people that are lucky enough to work in our wonderful industry are immensely proud of and will continue for it to be recognised as an integral part of the character and prosperity of our communities. This draft strategy provides a means for the industry to continue its path in building and consolidating a strong regional tourism industry which is able to more effectively respond the needs and opportunities open to our region while continuing to work with

neighbouring regions and organisations to maximise our joint tourism opportunities and contribution to Far North Queensland prosperity.

The draft strategy is based on four primary outcomes that are intended to make tourism a resilient and recognised part of the region, being:

- Vibrant tourism economy
- Tourism as a gateway for regional prosperity
- Cassowary Coast as its own regional destination
- Love the place you live

Recognising the Cassowary Coast as a distinct marketable area will only lead to further product differentiation and add to the diversity that has already been established by other sectors within our region (e.g. Hinchinbrook Way). The term "love the place you live" is of particular note in that the region has always had a strong sense of pride and recognition of its status as a 'special place'. Adversity through storms and global economic hardship has tended to redirect the focus more towards negative factors. This draft strategy tries to rekindle the rightful love its residents have had for the region, their place within it and pride in knowing the value that others from outside place on it.

I personally undertake to work hard in representing the industry for the whole of the region through TCT and the direction that is set through this draft strategy once it is adopted. I commend the reader to consider this draft strategy as an important opportunity to fine tune the aspirations of the industry and community in setting the compass for TCT and an exciting tourism future for the Cassowary Coast region.



Jasmine Porteous

J. Porteous
Chairperson
Tropical Coast Tourism Board



JOIN THE JOURNEY

*be part of
something
special*





"love the place we live"

ABOUT THIS STRATEGY

This strategy represents a collaborative consolidation of Tropical Coast Tourism (TCT) being the region's Cassowary Coast's recognised local tourism organisation (LTO), tourism industry members and Cassowary Coast Regional Council (CCRC) views regarding future tourism opportunities and needs for the Cassowary Coast Region. The strategy is an evidence-based, industry responsive assessment of contemporary global, national and regional tourism issues affecting the tourism future of the Cassowary Coast, its neighbouring regions who contribute to the region's broader tourism experiences and the Far North Queensland Region generally.

The strategy has been prepared by a taskforce consisting of TCT Board and other members with contributions and support from CCRC staff with additional comments having been provided through informal consultation with industry, government agency and tourist organisation representatives.

While building capacity within the tourism sector is of key importance, the strategy is as much about having the industry and community unite in realising how lucky and enviable the region's lifestyle is, how valued it has become by people from around the world and how the industry and other stakeholders can convey the region's tourism opportunities and experiences to interested

visitors in the most effective manner. Having our industry "love the place we live" and having this permeate throughout the community and reflected in the region's marketing and brand is a key aim of this draft strategy.

The strategy is intended to provide a blueprint for TCT to manage and grow its representation of the region's tourism industry and the industry overall focusing on:

- Industry capacity building
- Industry growth and coordination

- Industry responsive tourism planning and prioritisation
- Advocacy and representation

The strategy establishes a range of regional industry priorities that are intended to align with national and state government policies as well as regional community aspirations which are important to maintain broader industry readiness and acceptance and to protect the attributes that define the region's specialness in the first instance.

VALUE OF STRATEGY

The strategy is intended to guide industry and local government priorities for the tourism sector's growth, support services, destination planning and marketing for the region. The detailed strategies and action form a vehicle for further detailed government and private sector planning and investment into the region's tourism sector. Growth in the region's tourism is meant to be consistent with National and Queensland Government views about preferred economic growth for regional areas and for Far North Queensland specifically, focusing on the Cassowary Coast Region.

Being an industry-led strategy in collaboration with local government, the document shows a consistent approach across public and private sectors intended to provide greater certainty and direction for investors, tourism operators and community alike.

COMMUNITY AND INDUSTRY CONSULTATION

This strategy is in draft form for broader industry, government agency and community consultation purposes. The views expressed in this document are the preliminary views of the TCT taskforce and are open to further refinement based on submission that are received. You are encouraged to read the document fully and make any submissions in writing during the consultation period. All submissions will be further considered by the taskforce in the preparation of a final strategy document.

Details regarding public consultation opportunities are contained in the separate Information Sheet that has been prepared which can be obtained through the TCT and CCRC websites.

OUR STORY

ABOUT OUR DESTINATION

The Tropical Coast Tourism region extends over the whole of the Cassowary Coast Regional Council area and includes tourism influences and opportunities in the immediate adjoining areas within the Hinchinbrook and Babinda local areas. It is situated midway between Cairns and Townsville on the Queensland coast between two World Heritage areas, the Great Barrier Reef and Wet Tropics Rainforest. The main population centres are Innisfail on the river in the north, Tully inland, Cardwell on the south coast and the Mission Beach village precinct.

Historically, the rural region has existed on the agriculture sector which produces more than 90% of Australia's bananas as well as being a major sugar producer. In the north, the regional centre of Innisfail is a retail service centre, rich in early-settler history and glittered with Art Deco landmarks. Cairns is less than 90 kilometres by road north of Innisfail and is a major international entry point to Tropical Northern Australia. Mission Beach is a key regional gateway to the Great Barrier Reef as well as the family group of rainforest islands including Dunk and Bedarra. It is made up of four small townships: South Mission Beach, Wongaling Beach, Mission Beach and Bingil Bay – all connected by a palm-fringed beach that is reputedly the longest stretch of sand in North Queensland.

Located 140kms south of Cairns is the region's green jewel town of Tully, nestled between World Heritage Rainforests. It is also home to the renowned Tully River, capital of Australia's white water rafting for over 30 years and home of the International Rafting Association World Championships in 2019. In the south, the seaside town of Cardwell is gateway to Hinchinbrook Island with some of the best fishing and boating in Australia. Cardwell is located on the National Highway providing easy access to unexplored rainforests, rugged terrain, numerous waterfalls, steep gorges and unlimited waterways. Approximately 150 kilometres south of Cardwell is the economic centre of Townsville. A city of nearly 200,000 people, it is a key centre of industry and government services for the region and home to Defence facilities and James Cook University.

OUR STORY

The Region is a dynamic, multi-faceted montage of pristine natural wonders, historical pubs, boutique food experiences, spectacular islands, reefs and beaches, ancient rainforests, rich indigenous art and culture and friendly local characters.

Reef and Rainforest is traditionally the response for what is the main attractions that tourists want from their holiday in the region. However consumer research conducted by Tourism and Events Queensland reveals people are looking for a 5-pillar experience:

- Reef, Island and Beaches
- Natural Encounters
- Adventure and Discovery
- Lifestyle, Culture and People
- Events

Our region has all this and more with the advantage of offering the top three highly

sought-after experiences visitors are seeking. Whether it be a guided experience or choosing your own adventure, diving, snorkelling, hiking, mountain biking, white water rafting, skydiving, rainforest walks and fishing as popular activities throughout the region. The region offers the laid back style of speciality shops, markets and historical pubs while being able to meet local characters along the way.

The region offers an array of nature and adventure based activities in Australia's and the world's most biodiverse and unexplored destinations. The Wet Tropics World Heritage Area is abundant with animals and birdlife including some 30% of the nation's marsupials and 48% of its bird species. The pristine habitat boasts as many as eighty-five species of animal. It's not unusual to sight turtles and dugongs playing freely in the

waterways - The warm tropical waters have made the area home for many species of exotic marine life. Above the ground is home to butterflies, mahogany glider and so many types of birdlife – including the Cassowary, the bird that gave the Cassowary Coast its name.

Agriculture has also diversified into an additional tourism experience with the potential of becoming a world-class food producing region. While the abundance of natural beauty appeals to visitors, a variety of boutique food and beverage experiences are emerging to place the region as a tropical food bowl destination.

The region is popular for annual sports and community events such as Kurrimine Fishing Competition, Feast of the Senses, Ona Mission Multi Sport Adventure Race and

growing events such as the Aquatic Festival at Mission Beach and the extraordinary UFO Festival in Cardwell. Due to its inherent attractiveness and lifestyle character and proximity to the larger regional centres of Cairns and Townsville, the Cassowary Coast is increasingly being identified for its potential to host a range of diverse events.

Opportunity abounds in the region as ever rapidly expanding markets are increasingly looking for new holiday and lifestyle experiences. But the region is not alone – other centres are also working hard to develop their tourism industry and lifestyle services, constantly adjusting to market expectations and reaping benefits along the way for their communities.

Be inspired by *nature*, get lost in the *lifestyle* and discover your own *adventure*





TCT'S STORY

TCT has undergone several iterations and been a part of the tourism industry landscape since its formal inception in 2012. The organisation represents tourism industry members across a broad area of interest including the Cassowary Coast Regional Council and Hinchinbrook Shire Council areas. It is the only Queensland Tourism Industry Council (QTIC) recognised Local Tourism Organisation (LTO) that has a greater Cassowary Coast and extended regional industry focus with membership on both the regional tourism organisations (RTOs) for the North Queensland and Far North Queensland regions centred on Townsville and Cairns respectively.

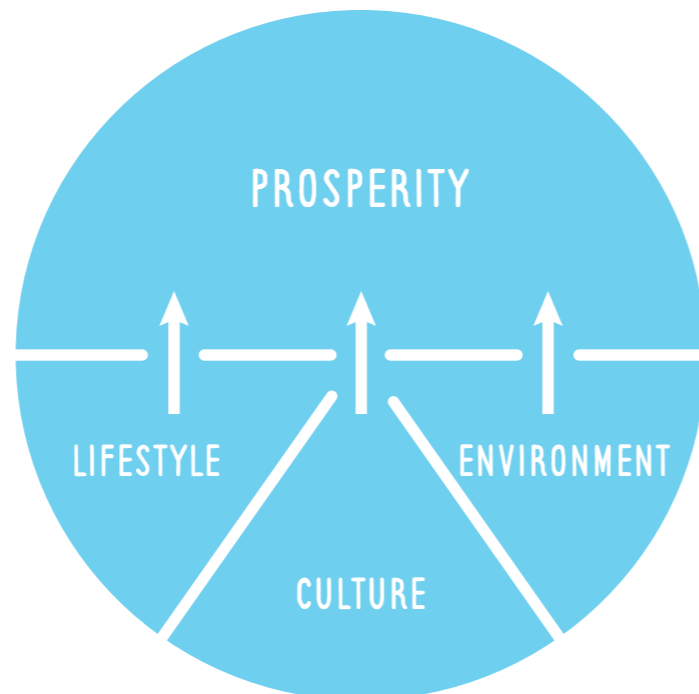
TCT works closely with the Cassowary Coast Regional Council and other nearby councils in influencing regional tourism strategy to benefit its members and the region as a whole. As the leading LTO with members that have experience and a genuine stake in the local tourism industry, it is best placed to represent the local industry sector and help to positively influence the region's tourism industry growth.

interests of the TCT members and broader community that are situated within the Cassowary Coast Region. The strategy recognises the importance of developing regional tourism product diversity and the benefits of establishing distinct Cassowary Coast and Hinchinbrook tourism brands. At the same time, it recognises the benefits of close collaboration in the development of complementary products and services to benefit our two regions.

Industry representation across the two regions through TCT provides a practicable way of ensuring that the vision for the tourism sector is able to be delivered. This can best be achieved with specific and individual goals in mind (such as those contained in this strategy) and through industry led support for the development of business synergies and better integrated customer service delivery mechanisms across the two regions and neighbouring tourist areas. Achieving this through an industry group is recognised by the Cassowary Coast Regional Council to be a more effective way of implementing its vision for the sector's growth and its importance to the community over time.

Tourism markets are increasingly seeking product sophistication and high levels of service. Reinvigoration and improvement of the tourism products in the region has been one of its previous hallmarks but has declined in recent years. While adverse weather events and global financial crises have played a significant part in adversely affecting tourism in the region, other tourist locations have also been similarly affected yet have also adapted their strategies to take advantage of changing opportunities and demands for the benefit of their communities.

TCT recognises that the region's tourism industry will need to similarly consolidate its efforts and work cohesively to grow and adapt its regional tourism products and support services in order to continue to play a significant part in the region's prosperity journey and to continue to showcase the lifestyle and beauty of the region which has made Far North Queensland an envy of different cultures nationally and internationally.



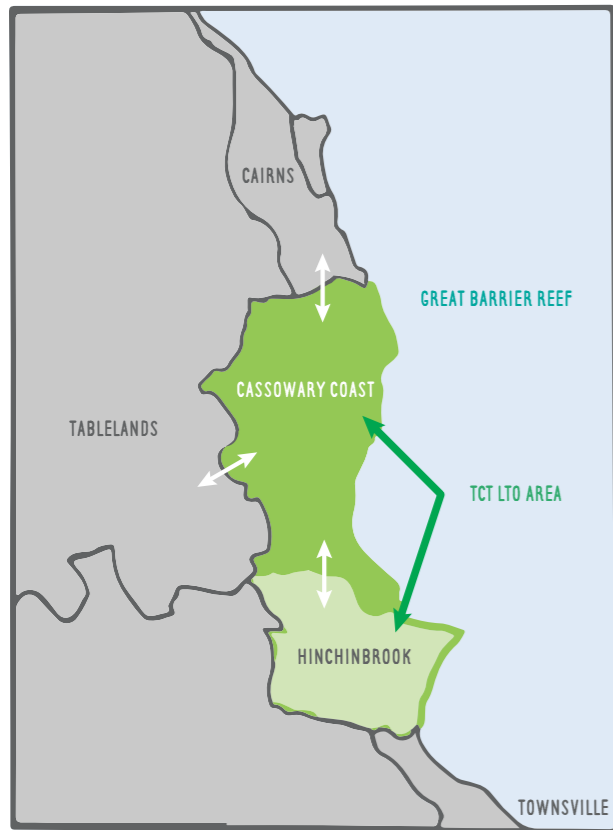
Tourism contributing to the region's prosperity

Strong member representation and industry-responsive advocacy and planning is what TCT is able to best facilitate and use to ensure a path that is readily able to meet ever changing and increasing market opportunities as well as ensure alignment with government policies to maximise local advantage. TCT has at its core a desire to keep the uniqueness and spectacular beauty of the region's tourism experience while maintaining the region at the forefront of quintessential Australian tourist destinations through an industry shared vision and responsive planning, strategies and actions.

THIS STRATEGY

This draft strategy is specifically for the Cassowary Coast Region and represents the Council's interests, the

A paradise for
lifestyle, culture
and environment



Relationship of TCT Local Tourism Organisation role to Cassowary Coast and greater region

COUNCIL'S ROLE

The Cassowary Coast Regional Council in collaboration with industry and other councils supports the adoption of an industry-led tourism strategy as a key driver for the region's economic activation and growth in community prosperity within the region. The industry, managed correctly, has the potential to contribute to economic growth as well as showcase the region to attract investment. The objectives of the draft strategy, its detailed strategies and actions and priorities form the basis of a necessary component of the Council's own economic development planning. The guidance that the adopted tourism strategy will bring and its implementation will help inform the Council's other statutory plans and policies.

Support for TCT and the tourism strategy is provided through financial assistance to TCT which is determined annually as part of the Annual Budget deliberations of councils under the requirements of the *Local Government Act 2009*, as well as council agreed plan making and specialist technical support.



THE NEXT CHAPTER

“ It’s not what
the destination
can do for us...

it’s what we can do for
the destination ”

TOURISM IN THE REGION

Tourism has played a significant part of the Cassowary Coast's economic growth. While the region has abounded in economic opportunity since its early discovery by European settlers, the natural beauty of the area and the relaxed lifestyle that the region is able to offer has also most likely played a significant role in settling people and helping the area to grow.

Today, the region offers one of the few authentic tropical experiences ranging from pristine tropical rainforest visits to adventure white water rafting on its natural rivers, sailing its 35 islands or walking its coastal beaches where the rainforest meets the ocean. This has led to a growth in tourist accommodation, support services (e.g. cafes and tourist shops) and access to a range of experiences through tours and the hire of equipment.

The 1970s through to the 1990s saw arguably the heyday of tourism investment into the region as well as steady growth in the residential sector for both the then Cardwell and Johnstone Shires. The impacts of two major cyclones in 2006 (Cyclone Larry) and 2011 (Cyclone Yasi) saw significant damage inflicted onto the region's tourism infrastructure and the economy. This was further, and arguably more significantly, affected by the Global Financial Crisis in 2009 and the associated evaporation of finance for tourism infrastructure projects.

Yet while tourism has suffered in the region, it is still recognised as one of the most important economic sectors for the region, being a service industry which has a high capacity to employ people and corresponding multiplier effect across other supporting sectors.

Tourism Tropical North Queensland (the RTO for the region's north) has recognised that the Great Barrier Reef alone is valued at \$56 billion with \$29 billion being directly attributed to associated tourism. A large proportion of this comes through the Cairns gateway and either already does or has the potential to make its way to the Cassowary Coast Region and its surrounds.

The region is fast positioning itself as the next lifestyle capital for people wishing to have

a high standard of living, a relaxed tropical lifestyle with still comparative easy access to a range of services for personal and business purposes. Being able to participate in the global economy from an enviable point of difference valued by potential customers and clients will be a key differentiating characteristic for the region. Tourism is and will continue to play a significant role as the initial gateway for the region's investors of the future.

The Queensland Government now recognises tourism, together with agribusiness, as the key sectors that are most likely to deliver prosperity to the regions. The Cassowary Coast has potential in both these sectors in plentiful supply and has significant potential for cross-integration opportunities for the two sectors – e.g. food tourism, farm stays and industry-related tours (farm properties and sugar mills).

CHALLENGES AND OPPORTUNITIES AHEAD

The region is rich in both existing and prospective tourism opportunities. Unleashing this opportunity is about how we as an industry and community will drive this opportunity to the benefit of the region as a whole. Earlier models of regional tourism have relied heavily on tourists discovering the area and accepting it substantially for what it could deliver at the time.

With the ever changing dynamics of globalisation and rapid increases in the global 'middle class' demographic, competition for tourism dollars is increasing daily. Cohesive industry led and industry responsive strategic planning and delivery of services is forming a defining part of successful tourism industry development and prosperity growth in regional communities. Working collaboratively and strategically across the sector and our region to grow the range and quality of experiences offered will be the dominant factor that defines the successfulness of the sector or otherwise.



Protecting our assets, our lifestyle, our character

Apart from the need for an activated, cohesive and well represented tourism industry, managing the growth of the tourism industry so that it does not begin to adversely conflict or denigrate the region's natural assets and lifestyle will be a significant challenge for the industry as it moves forward.

The potential number of visitors and scope services and experiences sought into the future is likely to be of a scale previously not contemplated by regional communities, our planning or business frameworks. The ability to speak as a cohesive industry across the region will play an important role in ensuring that our regional assets are recognised, protected and can be best sustainably utilised.

The 'global economy'

Globalisation is a process that has resulted in the expansion of business operations on a worldwide level, with the aim being to provide for a superior competitive advantage, and has largely been facilitated through advances in global communications, other technological advancements aiding production processes and delivery of services as well significant periods of relative political stability across

a range of developing economies. This has resulted in greater numbers of products, services and consumers at increasingly competitive prices.

The significance of this growing phenomenon to Australian tourism and to the region is that it is no longer as insulated from overseas competition as alternative tourism opportunities grow and as mobility and connectivity for potential visitors becomes easier and more prevalent. This not only relates to the number of options or opportunities that are available but also the quality of the experiences that are on offer. Australia, including the Cassowary Coast, is increasingly being required to consider external global influences in planning for and delivering our own tourism services.

A key factor in the Cassowary Coast Region's favour is that it has specific tourism assets that are not readily available elsewhere globally – notably our World Heritage Areas consisting of the Wet Tropics Rainforests and the Great Barrier Reef. These attraction alone, however are only likely to sustain the region's tourism growth unless also considered commensurately in terms of contemporary 'globalised' standards relating to quality, the provision of specific sought after experiences and how well the industry is able to acknowledge and respond to cultural diversity of global markets.

Accommodation and services development

The Cassowary Coast's tourist accommodation stock, in particular, is largely based on pre GFC models of tourism and associated demands. Similar situations exist in the areas immediately adjoining the Cassowary Coast Regional Council area. Much of this is based on small (limited bed numbers), often dated hotel accommodation or bed & breakfast style accommodation that forms a part of an existing dwelling house. There are few multi-storey accommodation providers with convention and other function facilities.

The Cassowary Coast's largest tourist area – Mission Beach and surrounds – has planning controls which effectively limiting all new tourism development to no more than 2 storeys. This blanket control and lack of any differentiation in bed-and-breakfast versus larger hotel-style development opportunities has limited commercial bed yields and acts as a significant impediment to further private investment, especially in terms of meeting expanding business tourism and international visitor markets. Growth in accommodation (i.e. bed numbers or caravan park/camping sites) has also been stagnant at a time when tourist numbers are increasing nationally and through the region.

A more industry-responsive approach to land use planning is essential in ensuring that the region's tourist accommodation is able to meet the increasingly more sophisticated demands of the 'globalised' tourist as well maintaining balanced levels of amenity and lifestyle experience for domestic markets seeking low-key tourist accommodation.

Being able to effectively differentiate and provide a range of accommodation options will be essential to showcase the area as a quality experience leader that stands out from other competing tourism locations. Design across the different types of tourist accommodation that is in keeping with accepted quality standards while showcasing the region's character and inherent authenticity will need to form key principles for planners and the industry alike. Accounting for 'disruptors' to traditional tourist accommodation models will also be important in developing effective responses to tourist needs. The growth in Airbnb supported accommodation which enables smaller-scale individual accommodation suppliers to enter the market through direct online services is having an increasing impact on how people are sourcing their accommodation and has the potential to affect how accommodation is presented and needs to be planned for in the Region into the future.



Land use planning for new tourist accommodation will also need to recognise and account for commercial realities in ensuring that planned models for future development will sustainably enable necessary investment to benefit the region. Older models of resort style, corporately owned destinations with concentrated equity have increasingly become less preferred models for national investors, instead giving way to shared equity models of accommodation development (e.g. strata title style development). With changes in the sources of potential capital investment (e.g. focus to international sources) and the low levels of investment in recent years, contemporary models including any preferred patterns for investment are yet to be observed for our region and the industry and Council are likely to require a level of flexibility in determining how it responds its policy position to this important aspect of our region's tourism future.

Appropriate unit density must also be considered to enable sufficient investment return. Density directly affects yield and will increasingly be important in creating sustainable local markets for services to meet market opportunities and visitor expectations. This has direct impact on the region's ability to influence the enhancement of visitor amenity and experiences (e.g. cafes and shops).

Finally, integration of tourist development with other functional development and the natural environment will be important in ensuring that the region's lifestyle attributes remain showcased and accessible to visitors. The region is fortunate in that it is as much a place to live as it is to visit. The blend, to date, of its tourism with its residential and retail centres is a key factor which has helped to create the laidback character of the area. While reinvigoration of the region's tourist development is essential, maintaining the lifestyle qualities of the area will be equally important through careful and engaged design and planning.

Planning controls for the next wave of the region's tourist development and associated services will require balance between rigorous market testing and sound land management practices in order to attract sustainable and acceptable development investment into the region. Locality-specific master planning that is based on collaborative community and industry engagement and which is able to better articulate desired outcomes will be the way of the future for the region's land use planning. Informed decisions about what is likely to represent sound industry investment, operation and collaboration principles will need to come from the industry itself, including through peak representative bodies.



The digital economy

Digital disruption has been one of the most pervasive forces affecting business and industry sectors in modern times. The rate at which the 'digital economy' has affected how products and markets meet is increasingly becoming more staggering each year. Based on some initial surveys undertaken by the Cassowary Coast Regional Council in 2018, industry and commercial sectors within the Cassowary Coast in particular, have a surprisingly low digital footprint – i.e. with as low as only 38% of businesses having a digital presence in some locations (CCRC Survey; unpublished, 2018). That is to say few businesses rely on the digital economy to advertise or to undertake online business for products or services. This includes the regional tourism industry.

While some tourism businesses have a thriving digital presence, many, including services operated by the Council rely very little or not at all on an online presence for business purposes. Many do not have a webpage, do not use free or low-cost services (e.g. Google My Business or TripAdvisor) or do not make the best use of social media and other platforms. Many do not have online booking facilities including through the Council's Visitor Information Centres (VICs).

Global population internet usage almost doubled between 2000 and 2018 (i.e. from approximately 2.4 million to 4.2 million). Asia alone accounts for 48.7% of all internet users and is also the most rapidly growing population globally (see <https://www.internetworldstats.com/stats.htm>). In the case of the Cassowary Coast, Council surveys have shown that many businesses do not make use of the internet (i.e. webpages or social media platforms) with 62% of businesses in some communities not online.

China is fast emerging as the faster adopter of internet services amongst its population with 55% of its population being attributed as users of the internet (MacroPlan, 2018). Tourism related internet usage is still primarily used for travel bookings (aided by budget carriers who rely heavily on self-book internet marketing) and then for accommodation and activities.

Online bookings now account for almost 60% of bookings for tourist accommodation and services based on Tourism Research

Australia figures (unpublished, 2015). While much of this is for travel (e.g. airline tickets), accommodation is increasingly sought through online services that list accommodation locations, prices and enable direct bookings to be made. Online services are also used to post reviews of services provided and people intending to utilise tourist services are increasingly also relying on posted reviews to help make their decisions. In a recent MacroPlan study for CCRC, 83% of people surveyed indicated that such reviews assist in selecting hotel accommodation while 68% used reviews to pick tourist activities.

Many other Queensland and Australian regional tourism destinations have well-coordinated and highly digitally responsive tourism marketing strategies or practices (e.g. Whitsundays, Gold Coast, Margaret River and the Surf Coast/Ocean Road). Effective digital services are no longer regarded as a 'business extra' but instead form a fundamental part of the quality experience with any business throughout the different stages of any transaction. This includes being able to access information about a product (including from third party reviewers), paying for services remotely, being able to personally correspond directly to tailor experience expectations, review the experience with the provider, make repeat bookings for favourable experiences and engage with others about the service provided and quality of the experience(s).

The region's tourist and tourist support businesses will need to ensure that the sector is not only well connected to the global digital economy to remain accessible and relevant but also to provide better coordination and delivery of package services across the sector. This includes the ability for accommodation providers to book tours and other tourist services directly for their clients.

A strong and cohesive digital presence is also important for effective regional marketing purposes. Digital marketing is now the number one method of establishing a recognised presence and to convey product detail. The Region's tourist businesses must be united in the marketing of the region's tourism economy through digital media if the industry is to compete with other regions, grow and sustain its status as a primary employment generator for the region and its economy.

Critical infrastructure and services

Increasing tourist numbers bring with it a need for commensurate infrastructure. Being able to direct and convey visitors to our region's facilities, including providing for safe, timely, comfortable and cost-effective transfers from one point to another will be critical in ensuring that the region is able to provide world-class tourist experiences. This includes sea-to-land, air-to-air and then onto other land-based transfers.

Road infrastructure and services

The present focus is largely on accommodating transfers for international and domestic visitors, largely from Cairns, who arrive by air transport through Cairns Airport. Increasing visitors are also expected to arrive on cruise ships as cruise terminal facilities are upgraded at the Cairns Seaport. Other major tourist visits to the area still come by road along the state highway network servicing the region. Road based arrivals are expected to continue to facilitate by far the most significant influx of visitors. This is expected to place greater demand on the quality of our roads and supporting infrastructure – e.g. coach facilities.

Governments and businesses alike will need to ensure that tourist development and tourism services are planned in a way that enables ready access from bulk passenger transfer services (e.g. coaches, hire vehicles). The region will also likely need to consider longer term regional facilities for improved coach interchanges as well as any strategic opportunities to improve air services to the region – either for direct international flights or transfers from Cairns and other regional centres.

The RV market utilises the region both as a thoroughfare to other destinations northwards and to the west but also sees it as a destination in its own right. Apart from a need for additional overnight facilities for caravans and RVs, on-road infrastructure to enable temporary parking for access to sightseeing, shops and tourist activities (e.g. adventure sports or access to guided reef or rainforest trips) will also have to form a part of the region's strategic land use planning and service delivery.

Travel amenity and safety are also essential in ensuring visitors have a positive experience and to maintain the region's brand that it represents a quality destination. The Cassowary Coast has a number of major state and local roads that also help showcase the region's scenic attractions and its lifestyle attributes. This includes roads such as the Canecutter's Way which highlights some of the region's characteristic agriculture, villages, rainforests and key tourist attractions. Other important routes include the Tully-Mission Beach and El Arish-Mission Beach Roads, Alexander Drive between Mission Beach and Bingil Bay and the many roads to our coastal villages.

Road transport routes are not only critical as connections to main tourist nodes in the region but also enable 'side connections' to the region's many interesting attractions that are just off our main transport routes. This includes the region's many waterfalls, lookouts and nature reserves. Recognising the strategic value of these routes and ensuring that adequate funding is provided to maintain such roads for adequate visitor access will be important in maintaining a thriving and diverse tourism economy into the future.

Air transport infrastructure and services

The Cassowary Coast currently only has operational light aircraft transport services. Previous larger aircraft regular passenger transport (RPT) services were operational through Dunk Island, however this service ceased with the damage to the island resort as a result of cyclones. As tourist visits increase, scope and demand for larger transfers and direct flights to the Cassowary Coast is likely to increase. Capacity exists at both Dunk Island and at the Innisfail Aerodrome at Mundoo to take larger flights, subject to upgrading of the respective facilities to meet current Air Services Australia standards as a prerequisite to increase passenger services and visitor numbers to the region, with potential to include some chartered flights direct from international locations.

The planning and development of larger scale air services to the region will need to

form a key part of any strategy to advance the region's tourism into the future. This is expected to be both for passenger transfers and potentially to accommodate (i.e. provide a base) tourism-related aviation services providers – e.g. helicopter services. Ensuring that adequate land-based infrastructure can be made available to cater for such demand and to support changing tourism demand dynamics is likely to be an important part in achieving a successful tourism strategy for the region.

With increasing personal wealth and specialisation of tourist services and experiences, consideration should also be given to the likely proliferation of personal or small scale air services. This includes for both fixed and rotary wing aircraft use for personal transport as well as charter aircraft. The region is generally well endowed with a range of airstrips at Innisfail, Tully, Dunk Island and Dallachy (north of Cardwell) – all capable of readily dealing with small aircraft.

Potential future allowance may also be needed for other destination-specific locations particularly for rotary winged aircraft to enable quicker transport and access to destinations across the region or to provide for inter-regional transport (e.g. Cassowary Coast to Tablelands) or linkages to major international destinations such as Cairns Airport.



Marine infrastructure

Recreational boating

Fishing is recognised as one of the most popular high value, recreational sports in Australia. Information about boat ramps (i.e. their location, size, parking and other features) can be invaluable to anglers seeking access to fishing grounds. Marine tourism is estimated to contribute approximately \$3.7 billion in direct and indirect value to the Australian economy for recreational fishing and boating alone (i.e. estimated by Australian Institute of Marine Science for 2013-14) with an average increase of 5% per annum. The increased demand for boat access to Great Barrier Reef locations including from along the region's tropical coastal waters, estuaries and islands can also be expected to place greater demand on the region's boat ramps and marinas.

Access in the southern parts of the region at Hinchinbrook Harbour has been of considerable concern with a recognised need for the existing harbour and channel access facilities to be reinstated to enable safe, all-tide access to the Coral Sea and the region's spectacular islands including the world-class Hinchinbrook Island and its many pristine coastal waterways which is, at present, primarily serviced through Lucinda in the Hinchinbrook area.

Charter boats

Increased visits to the region is also likely to increase demand for access to the Great Barrier Reef, including outer reef experiences – both for fishing and diving. At present, there are limited safe harbour and marina or mooring facilities within the region. While Innisfail has limited mooring and marina facilities, access to the facilities is hampered by shallow water at the mouth of the Johnstone Rivers, limiting the capacity of marine craft that can use the waterway and safety for passengers and crew. Facilities at Mourilyan Harbour, while adequate in depth and safety, do not provide appropriate amenity due to the industrial nature of this working shipping port and the facilities immediately around it.

Clump Point is seen as a necessity for the Mission Beach area to sustain any type of reasonable charter boat industry into the future, including for larger capacity ferry-type marine craft expected to service the increasing adventure and reef tourism markets being expanded by operators in our region. A similar necessity is seen for the Port Hinchinbrook facilities which once provided thriving charter boat services to the region prior to the damage to those facilities during Cyclone Yasi.

Cruise ships

Cruise ships are a rapidly expanding form of holiday market with an increasing appetite for short stay destinations. The Cassowary Coast is well suited for boutique cruise ship stays – notably in the lee of Dunk Island which offers spectacular views of the island and close access to coastal World Heritage Area Wet Tropics Rainforest as well as many iconic Cassowary Coast coastal towns and villages. The region's Mourilyan Harbour also represents a ready shipping terminal for boutique cruise ships providing direct mainland shore access for shipping.

While the Cassowary Coast is already suited to cruise ship stopovers, scope exists for significant improvement in infrastructure and services to transfer passengers to shore and to the range of activities, goods and services that the region has to offer. This includes shore-based passenger embarking/disembarking facilities, coach and other hire vehicle transfer points and tourist greeting services aimed at welcoming and guiding passengers to the range of different activities.

Super yachts

Apart from recreational boating, the region is also a prime destination for the growing cruise yacht (or super yacht) market. While the region has many islands, reefs and other natural coastal attractions, there are no practicable shore-based facilities. Reinstatement of the Port Hinchinbrook marine facilities, the construction of the Clump Point marine harbour and channel maintenance of the mouth of the Johnstone Rivers at Innisfail will ensure that the region has a network of appropriate shore-based facilities for super yachts comparable with other locations that are equally vying for this lucrative market.

Internet services

The internet is the tool of choice for most travels. Digital information provides us with communication access to people as well as instant access to information about where we are, where we would like to go, how to get there and what we can expect when we are there. It helps us plan our visits and can inform us about a range of different things along the way. In many instances it has replaced hard copy maps and also enables us to make many transactions in advance.

Detailed information about access points and parking facilities for walking trails, including descriptions about the trails themselves can help define a region's bushwalking and scenic attraction credentials. Access to internet facilities in remote locations can also aid those visitors who wish to maintain a level of digital connectivity during their tourist experiences. This can be to gain access to additional information about the location or to let friends and family know about their experiences in real time.

Internet services are also expected to become increasingly important as 'Big Data' becomes a more important part of tourism in Queensland and for regions as they need to compete. Enabling tourist access to internet data and transaction services is already valued for the ability to build databases about consumer patterns. Understanding tourism consumers through website analytics will be critical in identifying:

- Where they come from?
- How did they get there?
- What are they purchasing?

This information will become increasingly critical for the Cassowary Coast tourism

industry as it needs to compete for tourist numbers and expenditure against other regional and international tourist destinations.

Visitor information

Visitor information services are increasingly important for both visitors and industry alike – providing a means for visitors to obtain information about tourist experiences in the region and for industry to showcase its wares. Critical in the way forward will be to ensure that visitor information services are reflective of contemporary demands. Much of this will be digitally based with a need for greater business networking across the sector and an ability to provide for online transactions across the business network, including outside of the region (e.g. accommodation and inter-regional transfers).

While face-to-face visitor information services will still have a place, the use of dated visitor information centres (VICs) is expected to be superseded by the digital economy with much greater reliance on face-to-face services being provided by businesses directly. VICs are likely to primarily have a role where they are consolidated and provide other value-add visitor services which may include cafes, galleries and educational awareness venues. Such services are likely to require and benefit through direct partnerships with private sector and community organisations (e.g. artist cooperatives). A key consideration in the change-over to a digitally based visitor information service will be the need to maintain unbiased information that represents the broad spectrum of regional businesses and not unduly favour individuals.

Emerging tourism products

The region is becoming home to a range of emerging tourism activities as well as consolidating some existing forms, albeit in ways that are more responsive to current tourist trends and demands. While earlier forms of leisure tourism focusing on reef and marine activities are still and will remain popular, other forms of tourism that are growing or have potential to grow in popularity include:

- Adventure tourism - e.g. white water rafting, kayaking, sky-diving and mountain biking
- Marine – e.g. reef and freshwater based fishing, boating, island exploration scuba diving and snorkelling
- Food tourism– e.g. chocolate production, coffee, seafood and tropical fruit
- Drive market – e.g. caravans and RVs (including 'grey nomads'), motorbikes and road cycling
- Rural or 'agri' tourism – e.g. farm stays and seasonal workers (e.g. for 'grey nomads' and backpackers)
- Health or therapeutic – e.g. spas, health and yoga retreats
- Eco tourism – e.g. environmental awareness tours, wilderness photography, hands-on workshops (land rehabilitation, sustainable land management practices)
- Business – e.g. conferences and corporate workshops, professional development and team building
- Events - e.g. shows, campdrafts, markets
- Lifestyle and culture experiences - arts and performances
- Wedding and romance experience – provision of specialist venues and locations to cater for a range of nuptial ceremonies, notably weddings and honeymoons

The 'creative economy'

The so-called 'creative economy' is fast becoming one of the most important aspects of a sustainable regional tourism economy. This includes the recognition and celebration of local arts, culture and society. Increasingly, many of Australia's most recognised regional centres for lifestyle and tourism are also those that have the most vibrant recognised creative economy aspects. The region has a rich history of arts, craft, performance and cultural diversity. It also has an established legacy of iconic gathering venues – many of which are based on food and drink (e.g. cafes in Innisfail, bakeries in Wangan and Mourilyan). The region also has many established authentic Australian hotels, including in many small villages or rural hamlets.

Locations which celebrate local social gathering and which are also warm and inviting to tourists are much sought after and form a growing market for tourists nationally and internationally. Cafes and eateries form an important part of this mix. Reinvigoration of the region's cultural or 'creative economy' and showcasing its lifestyle, history, food and its arts and crafts is expected to be a key aspect to successfully bind the fabric of the region's tourism locations and activities.

Identifying and showcasing existing champions in this field should form an important part of any tourism strategy for the region. Similar considerations extend into 'providence considerations' for goods grown and produced within the region. Often the story about where a product comes from is as important as the product itself and can also serve to showcase aspects about the region of origin.

Art Deco

The Cassowary Coast is recognised as one of Australia’s premier ‘art deco’ areas with many examples of art deco architecture in Innisfail and Tully which provides a special opportunity for the region. Much of this has been a legacy from the destruction caused by a cyclone in 1918. This resulted in many buildings being built in the ‘art deco’ style of the time. This feature is increasingly sought after by people interested in the architectural style and the society and lifestyle of the time that it represented.

The art deco legacies of Innisfail and Tully are potentially particularly significant in that these towns have previously been primarily regarded as ‘working towns’ of the region and have not necessarily featured strongly as part of the region’s tourism attractions. Utilisation of art deco character not only compliments but is arguably one of the region’s potential cornerstones for its creative economy.

Event planning and coordination

As in many regions, events has formed an important part of the region’s visitor attraction strategies. This includes regular markets as well as a range of specialist events, performances and competitions (e.g. showcase sporting events). While such events can add to the region’s cultural diversity, maintaining consistency and improvement of the experiences offered can be particularly challenging for small communities and organising groups. The spreading of human and other resources too thinly or inconsistently can lead to attendee uncertainty and loss of motivation to visit. Worse, poor experiences can lead to negative social comment which can further undermine an events future sustainability and value to the community.

Managing the region’s events strategically and in a coordinated manner to ensure that maximise advantage to the community in terms of economic and social benefits as well as reinforcement of the region’s brand will need to form a key component of an effective regional tourism strategy. This is particularly in the face of other nearby regions that are also competing for visitors and visitor dollars.

Regional networks

The TCT region is located between the two largest regional centres outside of SEQ – Townsville and Cairns. The level of development in the region and its economic buoyancy is inexorably tied to those two regions as well as other local synergies that are able to be established with other adjacent regions – in particular tourism development in the Tablelands and Hinchinbrook regions. Growth in the Cairns tourism sector, notably in accommodation to cater for increased visitor numbers, has significant potential to provide increased demand for visits to the region.

The region’s success into the future will be predicated on its ability to maintain an adaptable approach to its marketing of tourism products and its ability to establish and grow appropriate networks that can leverage tourists to our region. In this regard, maintaining strong strategic relationships with outside regions and leveraging off much broader tourist routes and attractions across far North Queensland and further afield regions (e.g. Savannah Way) is likely to remain an important aspect of an effect tourism strategy for the region.

Maintaining regionally beneficial linkages and associations with inter-regional organisations such as TTNQ and TEL, other industry associations (e.g. Association of Marine Park Tourism Operators - AMPTO, Australian Tourism Export Council – ATEC, Queensland Tourism Industry Council - QTIC) and other local government regions will continue to play a significant strategic part in the implementation of effective regional tourism strategies and actions. This is both to ensure the region remains inclusive of any broader cross-regional marketing campaigns and also to maintain an effective line-of-sight between local regional, cross-regional and state policy frameworks and priorities in order to provide our region’s tourism industry with directional certainty.

Networks – an important part of our *tourism*



Climate conditions

While climate conditions, including over the longer term are increasingly being recognised as a potential threat to effective planning and delivery of quality tourism experiences. Climatic events can have particularly devastating effects on the ecology of the Great Barrier Reef and coastline, especially through severe storms and periodic fluctuations in sea temperatures. This coupled with the risk of long term sea level rise can have dramatic adverse effects on tourism in our region. At the same time, education, communications and people’s awareness about the environment is also at a heightened level and can readily influence their decisions about which travel and tourism experience options they wish to prioritise and take.

Perceptions about localities are or can be significantly influenced by climatic events and can have lasting impacts on visitor numbers and tourism viability. Adverse weather associated with Cyclone Debbie in 2017 and earlier with Cyclone Yasi in 2011 and Cyclone Larry in 2006 demonstrated the need to have strategies ready to counter adverse perceptions about business readiness to cater for tourists after the event. In the long terms, businesses and governments will also need to ensure that responsible new development is undertaken. This is not only to ensure safety and appropriate protection of property but also to meet the expectations of future visitors about responsible decision making.

VISITOR AND INDUSTRY TRENDS

Tourism within the region has had a fluctuating history in terms of its contribution to the regional economy. At present, the tourism economy of the region, while improving, lags behind other regional tourist regions and Queensland as a whole. Although visitation in the region has increased by 3% in the last 3 years, the total visitor nights stayed in the region has decreased by 20% (Space Time Research).

Much of the Cassowary Coast's employment growth has been driven by agriculture, accounting for 23.1% of the growth between 2006 and 2016. This is counter to the trend for Queensland and Queensland tourist regions in general (which also include the large urban areas of the Gold Coast and Sunshine Coast regions) where there has been a significant decline in Agriculture and sharp spikes in the Accommodation and Food Services, Education and Health.

In Queensland, overall, the economy has undergone a transformation from an agricultural/mining economy to one that is services related with education and health being the main drivers. Accommodation and Food Services (a key indicator for the tourism industry) has lagged in regional centres compared to the Queensland and tourist regions averages as shown in Figures 1 and 2. This has been most significant in the Cassowary Coast where there has been a decline in the number of persons employed in the Accommodation and Food Services sector between 2006 and 2016. While this may be partly due to the effects of the GFC and cyclone events, other regions have also experienced adverse weather events and the effects of the GFC.

The Queensland and tourist region trends indicate that there are potential gains in the contribution that tourism can make to the regions. In 2012-13 tourism directly accounted for 140,000 jobs (or 5.9%) and indirectly accounted for 101,000 jobs, or in total 10.3% of employment in the state. This is substantially more than the mining sector (74,000 direct jobs) and agriculture, forestry and fishing (66,000 direct jobs). Cafes, restaurants and takeaway food

services had the largest share of tourism employment (26%), followed by retail trade (18%) and accommodation (13%). (Source: Tourism Research Australia -State Tourism Satellite Accounts 2012-13, Queensland Government Office of Economic and Statistical Research).

Deloitte Access Economics has valued the Great Barrier Reef at \$56 billion, with an economic contribution of \$6.4 billion per year. Much of this – nearly 90% or \$5.7 billion was from tourism alone (Deloitte Access Economics, 2017). A large proportion of the growth potential in tourism is expected to be fuelled by growth in the global 'middle class' demographic – much of this is expected to be driven by growth in South East Asia. By 2031 SE Asia is expected to accommodate a 1.7 billion middle class – an increase of 1.2 billion people on 2016 figures.

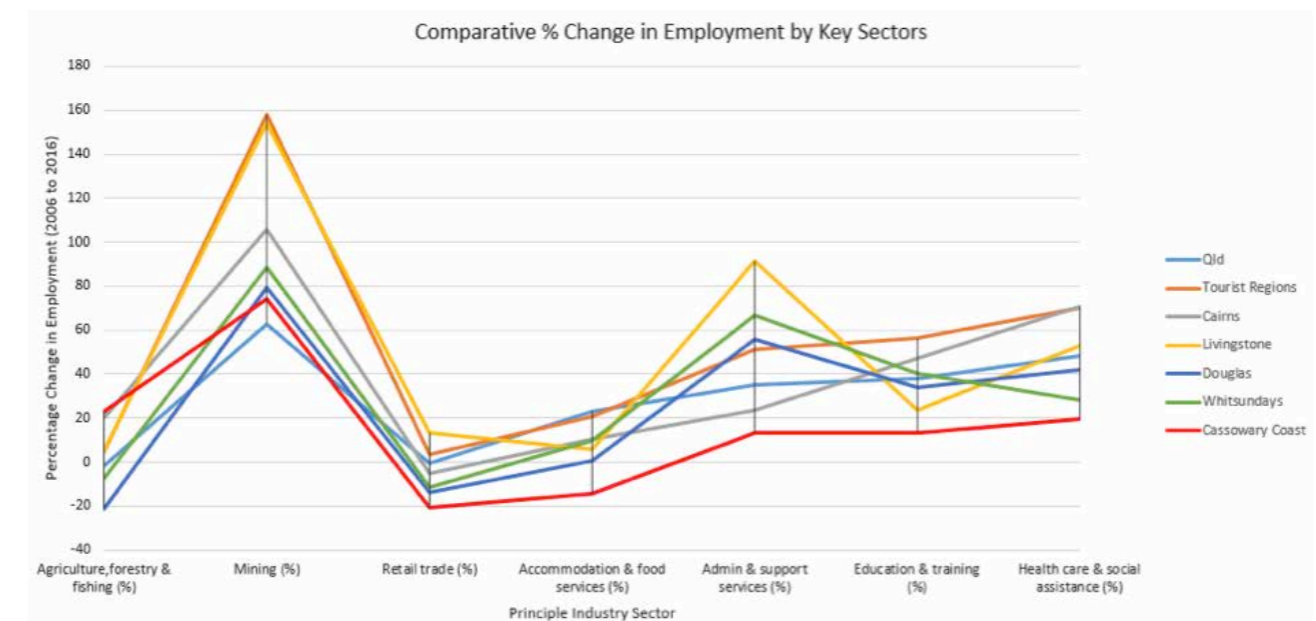
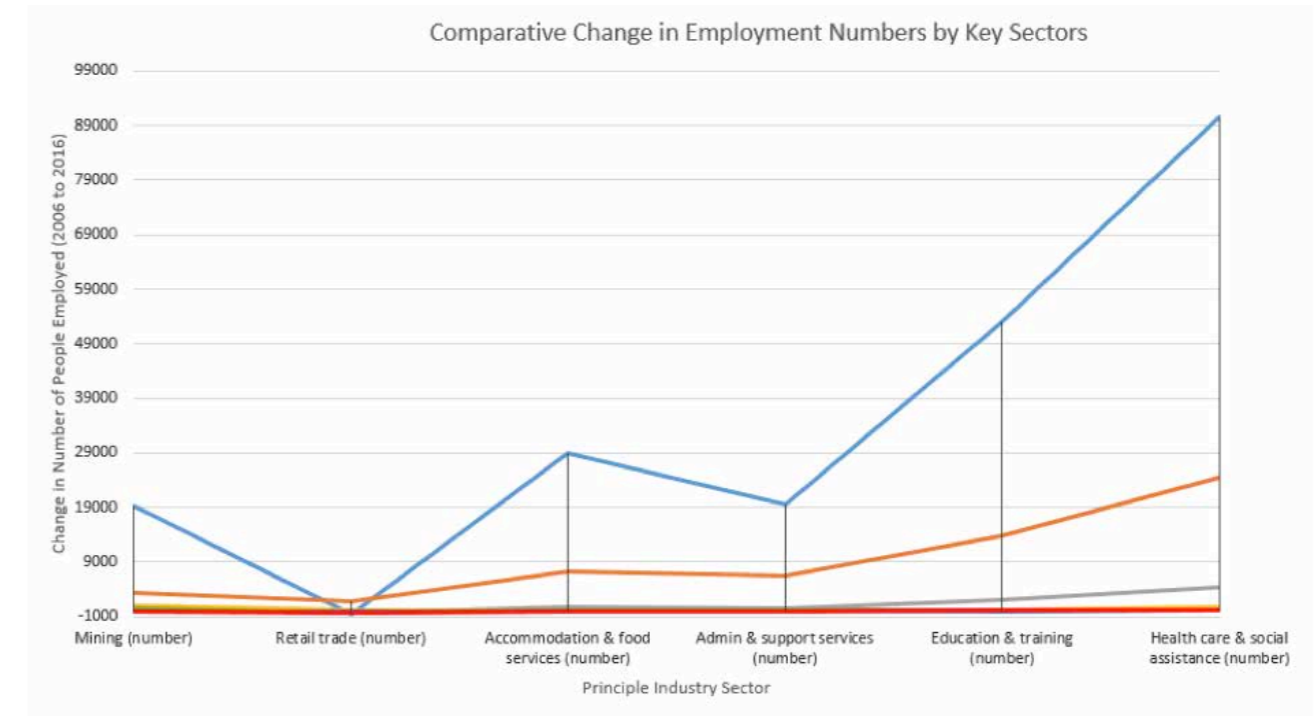
The International tourism sector is increasingly important to the Australian economy. In 2013-14, international tourism contributed almost 1 per cent of Australia's GDP (about \$11 billion) and comprised just over 60 per cent (\$36 billion) of total service exports (Australia's International Tourism Industry Productivity Commission). While potential growth in the overseas tourist market is very large, there is also potential growth in the Australian market. In Queensland alone, the state's population is expected to reach 7.1 million in 2036 from 4.7 million in 2014. At the same time, the proportion of aged persons is expected to increase. In order to capitalise on this significant growth in potentially available tourist market, significant industry changes are likely to be expected over time in order to meet the expectations of these new markets and to stay competitive.

The changes in tourist market demographics is likely to precipitate the need to reconsider the way tourist services are to be delivered both in the Accommodation and Food Services and Retail sectors. Studies in the United Kingdom have shown that one of the greatest drivers for tourism is the Retail sector. Tourists have a far greater propensity to wish to shop than to look at

some attractions (Lennon J; 2013). The dilemma for regions like ours is that it must first build on its tourism base in order to attract additional tourists to make retail more viable.

Chinese tourists to date have been least likely to focus on adventure tourism activities

but are more heavily interested in organised activities particularly when centred on urban centres with strong retail emphasis. As the number of available younger visitor cohorts grows, a corresponding increase in the level of interest in eco and adventure tourism can be expected (MacroPlan; 2018).



KEY DRIVERS ENABLERS AND INFLUENCERS

Globalisation and population increase

Globalisation of our world economies and increasing prosperity creating a growing 'middle class' demographic is driving increased demand for escapist and relaxation products. Increases in education may also increase peoples' desire to learn about and experience different exotic cultures and locations. Advances in telecommunications including the internet and improved and cheaper travel have also made tourism a more accessible option for many people.

Much of the world's globalisation is driven by population and wealth increases in South East Asia and notably in China. The Brookings Institute in 2017 estimated that the middle class socio-economic demographic will increase by at least 140 million people annually globally and that this could rise to at least 170 million people within the next 5 years; 88% of this is expected to be driven from Asian populations – mostly out of China. This represents a significant potential market increase for Australian tourism, including for regions like the Cassowary Coast and has the potential to significantly shift many regional Australian tourism economies from a domestically dominant to internationally dominant focus.

Importance of the service economy

Regional Australia has to date largely been dominated by rural economies focused on agriculture and mining. While these sectors have supported towns in the past, rapid improvements in technology including large-scale mechanisation and sophistication of farm management practices has seen a decreasing need for farm labour. At the same time, major urban centres have further aggregated their populations drawing services into the metropolitan centres and away from regional centres. Internet access has made many of these services available to regional

populations remotely (direct to the home) reducing their need and viability within regional centres and towns.

The ability of regions to maintain sustainable growth and prosperity is increasingly recognised as being linked to the ability to create a healthy service economy which has the highest proportion of employment. This includes the tourism sector. While it will continue to be difficult for smaller regional towns to compete with services that are able to be provided from the metropolitan and some larger regional centres, regional successes will be measured and driven by the ability to identify niche or unique service economy opportunities that are valued by people and can help drive local economies.

Tourism and its linkage to a revitalised agri-business economy in the region is expected to be a part of a necessary transfer for the region to successfully compete with the much broader nationwide progression to a 'service economy'.

Aging populations

Aging populations are a world-wide feature of modern economies. While this can be seen to have some potential negative economic effects in terms of the cost of age care, new retirees also tend to be the demographic that also represents 'free independent travellers', often with both time and disposable surplus income available for travel. This increasing market has its own needs and expectations which if properly catered to can help energise local tourism economies as well as potentially help showcase the region's retirement living attractiveness. The nation's 'grey nomads' represent one such market which the Cassowary Coast already caters towards.

As the world's middle classes increase and age at the same time, the number of potential 'free independent travellers' is expected to increase significantly providing a much larger influence on product types and the need to respond to cultural demands. This is likely to include regard for different cultural values, differing perceptions about what represents quality experiences and dealing with practical considerations like language barriers.

Access to capital

While growing populations are what ultimately affect visitor numbers, the building of tourism infrastructure and facilities is influenced by the availability of investment capital (money). Much of Australia's available capital for new investment, notably larger projects, comes from overseas sources and is subject to global macro-economic conditions which affect taxes, interest rates and return-on-investment potential in other countries. This can have a dramatic effect on the flow and cost of capital in and out of Australia.

While strategies such as this are unlikely to have any significant effect on such global forces, it is useful to be reminded of the potential benefits of a conservative approach when planning for tourism growth in order for industry and governments to minimise risk and have greater potential to keep the region's tourism sector more buoyant and sustainable into the long term.

Exchange rates

Comparative international costs for tourism experiences is becoming increasingly more important in influencing tourism opportunity. This is especially so where our region's tourism is turning more towards international visitor markets. While a strong Australian economy may be good in terms of international buying power, export competitiveness can be affected by a strong Australian dollar. This applies equally to tourism which seeks to attract overseas visitors.

It is estimated that a 1% increase in the Australian dollar has previously resulted in approximately 0.24% decrease in visitors in the short term and 0.46% in the long term (MacroPlan, 2018). As wealth increases in international countries, so too is the likelihood of improved competing tourist experiences in other destinations, making the effects of exchange rates and competition even more pronounced. The need to provide exceptional quality experiences and to tailor towards more precise markets is expected to become more critical as the region's tourism opportunities grow and mature.

Government policy

The Queensland Government has recognised tourism and agri-business as cornerstones for the economic development of its regions. Both of these are significant and can complement each other within the region. The Commonwealth Government, through Tourism Australia, also recognises the importance of tourism and the need to build its resilience and competitiveness to grow its economic contribution as referred to in its strategy – Tourism 2020.

Alignment of the region's tourism strategy with Federal and State government policy as well as a united regional industry is likely to be key determining factors in attracting government support to catalyse strategic tourism projects, provide improved certainty and enhance potential private investor confidence.



OUR DIRECTION





The region's direction for tourism has emerged through a series of workshops, industry and government consultation. The need for a focus and new direction stems from the largely universal recognition that the world around the region is changing rapidly and the need for the region to have a contemporary response to how it wants to be a part of that change. The Cassowary Coast in particular has been overshadowed by competing hotspot regions that have successfully gained international attention. Offering a unique beachside lifestyle, Wet Tropics Rainforest and the closest access point to the Great Barrier Reef, the region has the potential to keep up with tourism

growth in the Far North and exceed modern visitor expectations.

The new direction for the region has its origin in a clear recognition of what the tourism industry and community like, do not like and wish to change about the region through carefully determined strategies and actions. The strategy that is determined is as much about the journey as it is about the 'end game'. Above all, the strategy is about recreating a self-realisation and pride within the industry and community generally – about our natural attributes, society and the way we deal and live with that!

WHAT MAKES THE REGION GREAT

The region has many natural, social and cultural attributes that make it attractive as a place to visit and reside within. The region's positive attributes are fundamental in shaping the region's values and principles for its way forward with tourism and how this is to help positively shape the community and its prosperity.

The region's natural assets, centred on the two World Heritage Areas of the Great Barrier Reef and the Wet Tropics Rainforests, are signature experiences in the region highly sought after in both domestic and international source markets.

Settlement and agriculture is largely regarded as being of a scale that has contributed positively to the region's scenic

landscape and to its character as a place where visitors can gain a genuine regional lifestyle experience in the Queensland tropics. The region's strength in agriculture is also seen as an opportunity to support 'food tourism' within the region.

The region's social and cultural diversity are regarded as its fabric that enables its potential to be realised as well as contributing to the range of experiences for visitors to the region. This includes both the original Indigenous inhabitants across the region and subsequent European settlers and cultures to the region. Maintaining and celebrating the region's social and cultural diversity are regarded as integral in managing a sustainable tourism strategy into the future.



OPPORTUNITIES FOR CHANGE

The region has a history of community resilience and rebuilding through adversity as well as celebrating more benign and positive times. Recent adverse weather events and the effects of the GFC have challenged the region's communities and the

ability to resurrect out of diversity. Maintaining a 'positive attitude' is recognised as a key issue for the industry and community and will be a key driver in ensuring that negativity does not place an unnecessary cap on the region's potential.



THE END GAME

The 'end game' for tourism in the region reflects the aspirations and needs of the industry and for the community and forms the basis for the strategies and actions. Four key points have been identified to resonate with industry and the community, influence industry sector growth and maintain industry relevance, being:

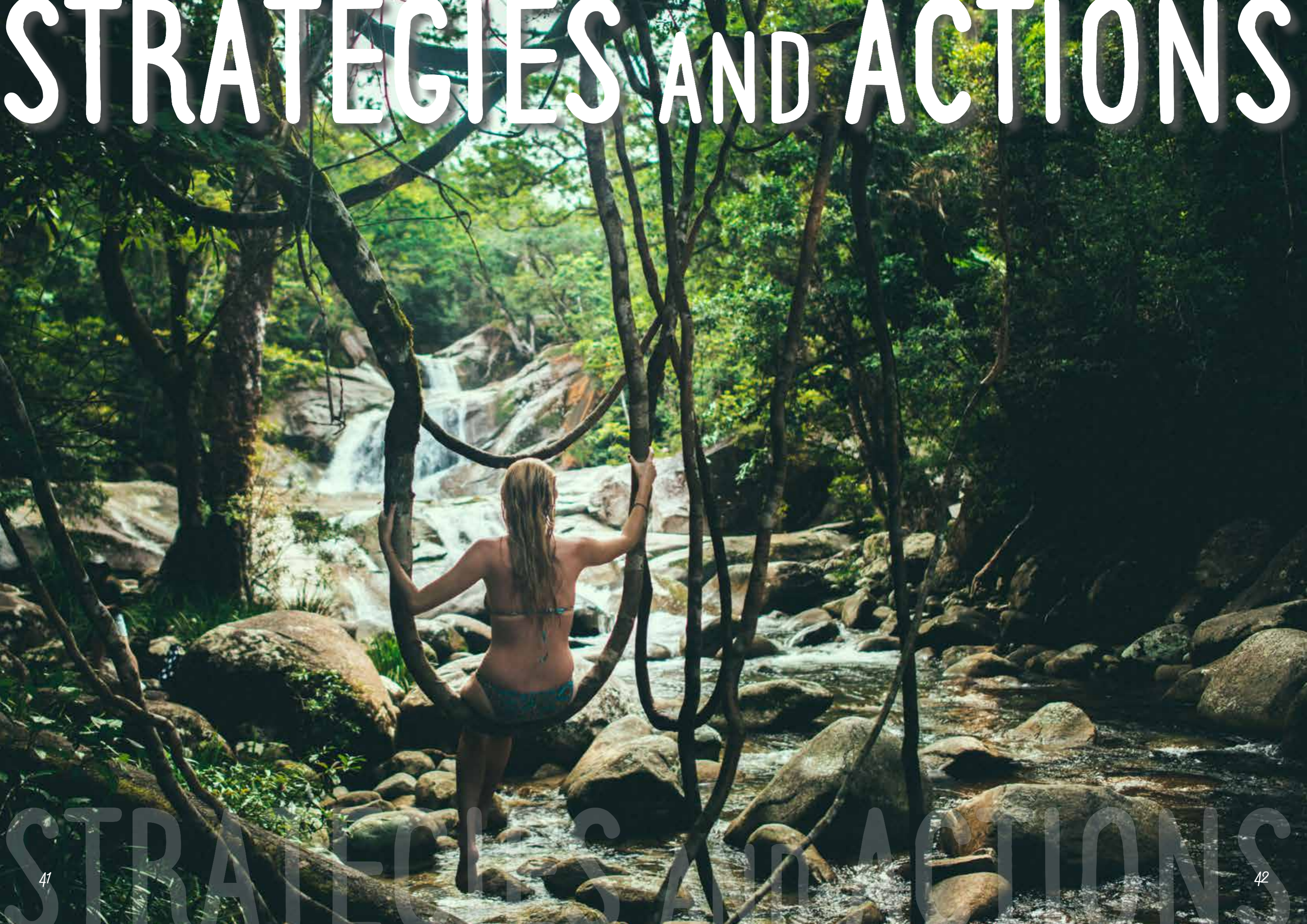
Vibrant tourism economy – ensuring that the region's tourism experiences meet current and emerging market opportunities and expectations in a manner that adds to the prosperity of the region while maintaining its character and authenticity

Tourism as a gateway for regional prosperity – recognise the role that tourism is able to play in showcasing the region for its beauty and lifestyle and its attraction for sustainable investment

Love the place you live – empowering the industry and community to recognise the uniqueness of the region and its communities and engender pride

Cassowary Coast as its own regional destination – promote the destination in its own right and not solely as a drive through (grab and go) market for visitors travelling through the region

STRATEGIES AND ACTIONS



STRATEGIES AND ACTIONS

THEMES

The four key outcome areas of the 'end game' have been translated into specific strategies and actions. These are defined according to the following implementation themes in order to better relate to and resonate with industry, Council and the community:

- Relationships
- Quality of service
- Business support
- Marketing
- Succession and governance

CATALYSTS AND PRIORITIES FOR SUSTAINABLE GROWTH

Specific actions have been indicatively prioritised in order to more effectively identify relationships between proposed actions, assist more detailed planning and budgeting for specific projects. Catalysts are those actions that are defined as having synergies with other actions or which are fundamental for the implementation of the regional tourism strategy overall. They are the actions that are most likely to determine the success or timeliness of other strategies and actions that have been identified by the Taskforce as shown in Table 1.

RESPONSIBILITIES FOR ACTIONS

The strategies and actions in this document are intended to represent TCT's primary strategy for the Cassowary Coast Region and reflect the corporate goals and key strategies and actions identified and supported by the Cassowary Coast Regional Council. The document recognises the largely volunteer status of the TCT Board and services provided to TCT by many of its members. While TCT has primary responsibility for the strategies and actions, much of this is expected to be in the form of industry advocacy and the identification and implementation of local Cassowary Coast Region marketing campaigns for its members and the growth of the sector within the region.

The Council will play a key role in collaboratively supporting TCT wherever practicable through its financial contributions and other staff resources subject to its Annual Budgets and other resource planning considerations. Other third party stakeholders are also likely to play an important role in helping to implement the actions that have been identified. These may include government agencies, local governments and other businesses.

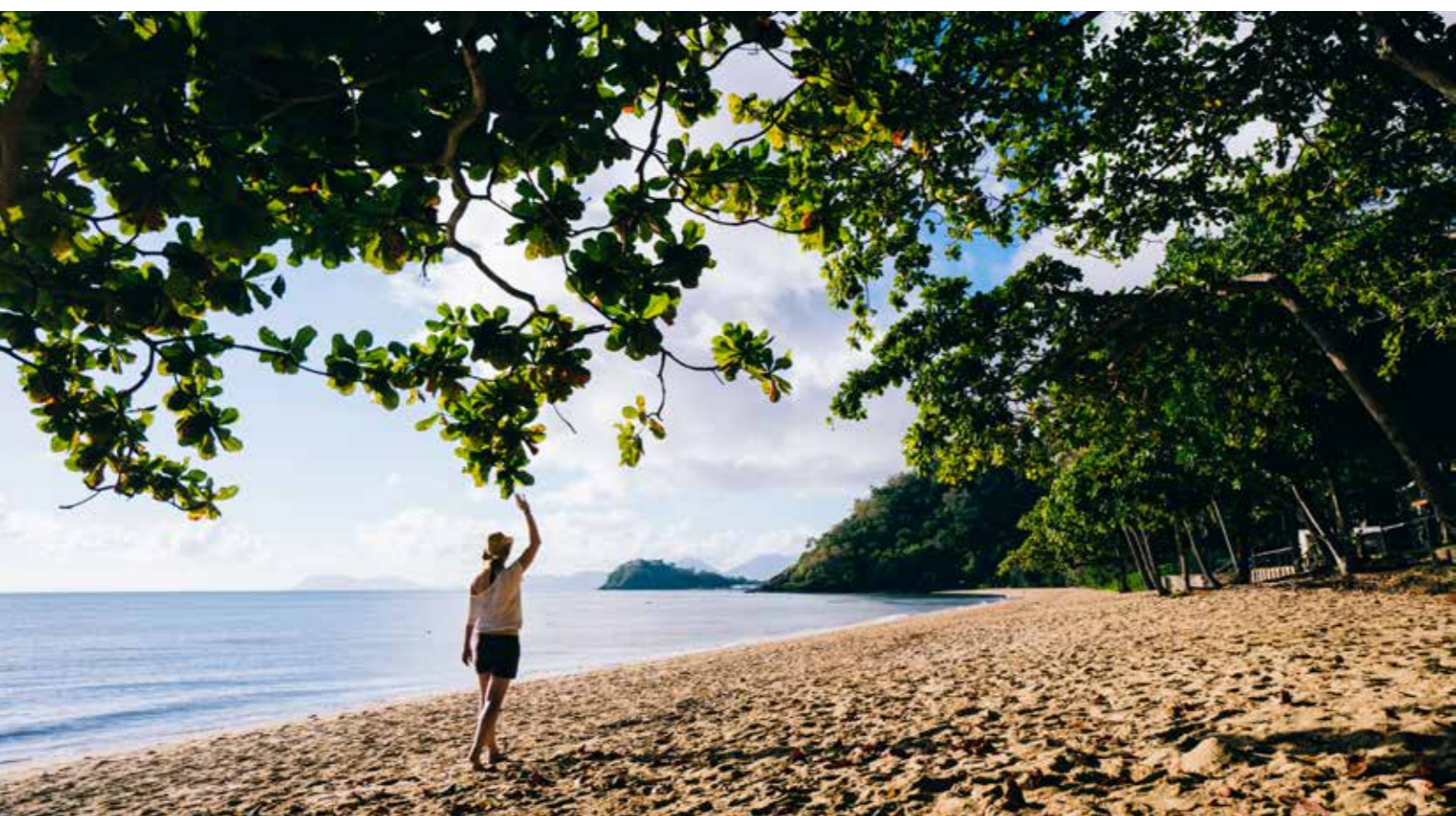
Table 1: Catalyst strategies and actions for the region

| TOP RANKING CATALYSTS |
|---|
| <p>Improve integration, collaboration of public and private sectors involved in tourism</p> <ul style="list-style-type: none"> - Consolidate a single regional tourism industry representative body to more effectively pool resources, unify our tourism industry's voice and enable more efficient use of external funding |
| <p>Provide enhanced quality of information regarding local tourist information and experiences</p> <ul style="list-style-type: none"> - Investigate and implement an enhanced digital services strategy for regional tourist establishments, including use of website analytics to support the industry - Review role of Council operated Visitor Information Centre (VIC) services in terms of contemporary customer requirements and efficiency/effectiveness of current operating model – make recommendations for revised VIC services |
| <p>The repositioning of the region's tourist destination brand</p> <ul style="list-style-type: none"> - Redefine the region's brand as an unmistakable regional tourism identity to more effectively resonate with residents and contemporary tourist and lifestyle markets - Grow consumer recognition that 'the journey starts here' |
| <p>Redefining the role and image of 'Tropical Coast Tourism'</p> <ul style="list-style-type: none"> - Encourage consolidation of regional tourist organisations into a centralised LTO, where practical - Body that is led by career-oriented professionals who are passionate about tourism and their communities and represent a diverse range of industry sectors and geographical locations to avoid bias - Identify clear funding strategies to maintain and maximise regional tourism industry development funding through TCT - Develop and implement an annual 'operations plan' and associated budget which highlights priority actions/projects and funding commitments - Investigate and implement an enhanced digital services strategy for regional tourist establishments, including use of website analytics to support the industry - Review role of Council operated Visitor Information Centre (VIC) services in terms of contemporary customer requirements and efficiency/effectiveness of current operating model – support recommendations for revised VIC services |

All actions have been prioritised according to the following timeframes:

- Short term 0 to 2 years
- Medium term 2 to 5 years
- Long term Greater than 5 years
- Ongoing Throughout the life of the strategy

Catalyst actions, by their nature, are generally regarded as 'short term' in order to give the strategy the best chance of success.



RELATIONSHIPS

Outcomes

- Unify and engage regional commitment.
- Empower Inspire the community, industry and visitors of our direction and tourism values.
- Enhance partnerships with other industries.
- Improve integration, collaboration of public and private sectors.

| Strategies | Actions | Timing |
|--|--|---------------|
| Grow industry participation, recognition and support in tourism | a) Advocate for TCT members, chambers of commerce, event organisers, industries and local businesses that benefit from tourism as opportunities arise – monitor opportunities through contact with members and by maintaining awareness amongst members of industry affecting issues and changes | Ongoing |
| | b) Identify opportunities to develop industry and community partnerships and use these opportunities for stakeholder consultation – develop a schedule of annual regional industry events to showcase and discuss industry issues and opportunities. | Ongoing |
| Grow desire to 'love the place you live' within the region when representing the region | a) Showcase the region's hero experiences through a point of difference. | Short |
| | b) Deliver authentic storytelling, quality experiences with a high standard of service. | Short; medium |
| | c) Grow and nurture local industry pride by showcasing industry and other community leaders that demonstrate the 'love the place you live' approach within the region | Short; medium |
| Inform industry and government of research and findings to assist in decision making | a) Initiate a program to fill data and insight gaps. | Short |
| | b) Identify organisation responsible for ownership, coordination, analysis and distribution of data. | Short |
| Align with industry organisations for decision efficiencies while acknowledging local diversity to delivery outcomes | a) Maintain active participation and partnering with RTOs and STO, while ensuring Cassowary Coast identify is maintained | Ongoing |

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| | b) Facilitate and leverage opportunities through RTOs and STO | Ongoing |
| | c) Partner with RTOs and align with opportunities to increase visitation to the Cassowary Coast | Short; ongoing |
| Improve integration, collaboration of public and private sectors involved in tourism | a) Review collaboration between MBBTA, Cardwell Tourism and work towards a common end-game, while recognising local diversity of tourism products | Short |
| | b) Engage with local operators through industry supported platforms and events | Short |
| | c) Consolidate a single regional tourism industry representative body to more effectively pool resources, unify our tourism industry's voice and enable more efficient use of external funding | Short |
| Maximise regional leveraging opportunities with Federal and State governments | a) Monitor Federal and State government tourism policy changes and inform members | Ongoing |
| | b) Provide regular regional tourism snapshot to local members and government ministers, noting where our region's industry initiatives align with or where opportunity exists for alignment with government policies | Ongoing |
| | c) Hold 6 monthly face-to-face meetings with local members and tourism ministers to discuss regional tourism matters | Ongoing |
| Develop and expand relationships across regions to further diversify and expand tourism experiences | a) Collaborate with other LTOs and regional councils to identify and develop cross-regional tourism experiences and networks | Ongoing |
| | b) Participate in cross-regional advocacy to governments and other industries to strengthen tourism capacity in the region and FNQ | Ongoing |
| Embrace the region's cultural diversity as a hallmark of its tourism development potential | a) Actively liaise with the region's Indigenous representatives to identify scope for integration of Indigenous culture into the region's developing tourism opportunities | Ongoing |

QUALITY OF SERVICE

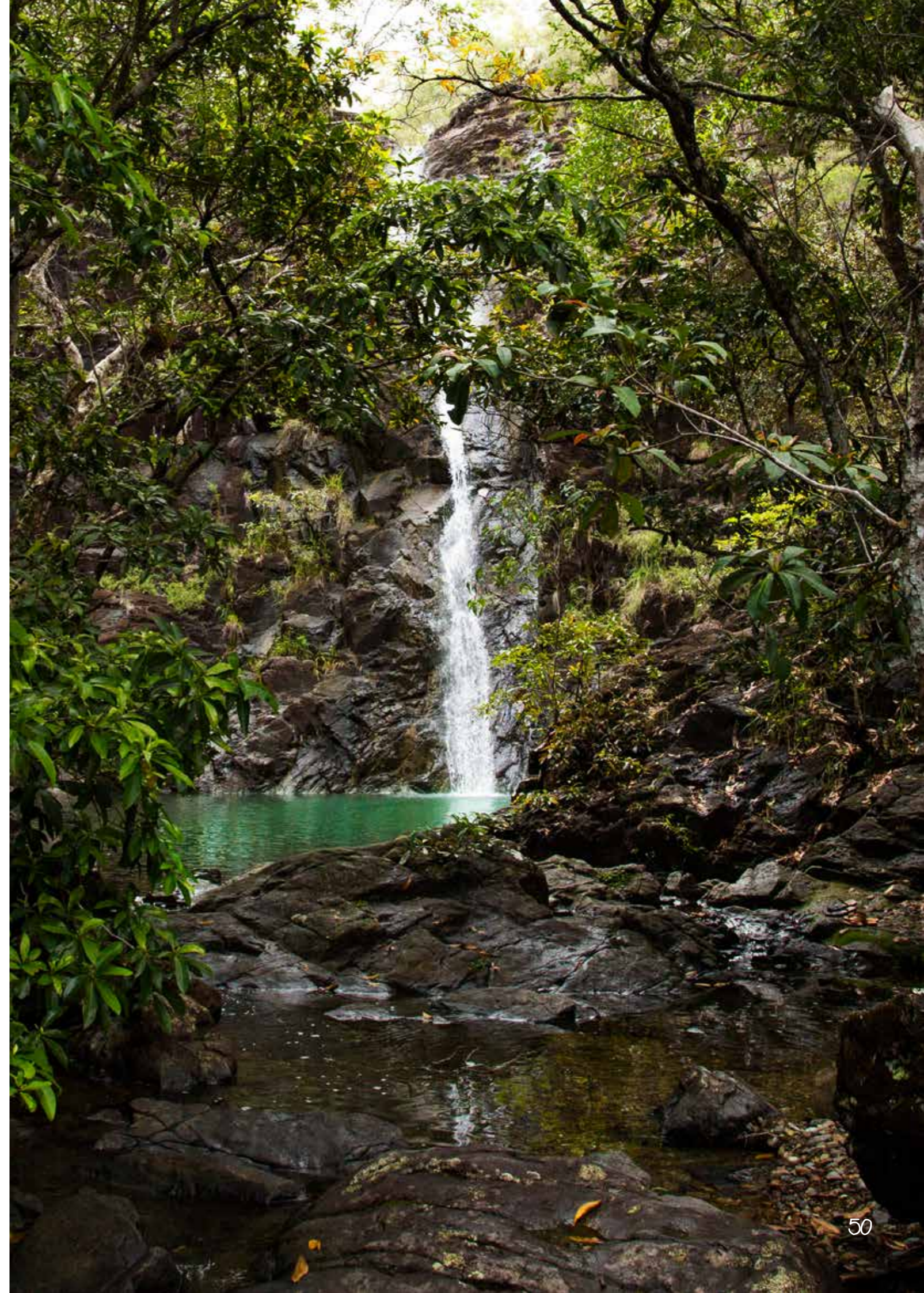
Outcomes

- Build advocacy and promote best practice to provide quality experiences and high standard of service
- Develop a successful industry that is connected, efficient and does business better
- Increase product diversity and quality of experience that recognises and celebrates our region's character and authenticity

| Strategies | Actions | Timing |
|--|---|---------|
| Increase recognition and support for the industry | a) Champion small to medium enterprises that promote business success and quality visitor experience through industry networks and the community – ensure that at least one local business is showcased at any business event | Short |
| Recognise the advantage of the digital landscape and build industry capability to maximise our region's digital footprint. | a) Digitally assist the industry and businesses to identify and manage platforms that further strengthen and enhance the region's overall reach. | Short |
| | b) Encourage more products to engage in digital activity to improve visitor experience by making more products available online. | Short |
| | c) Develop a regional Digital Tourism Services Strategy to provide for enhanced industry business networking to improve customer experience | Medium |
| | d) Connect the industry and businesses with digital tools and resources to enhance collaboration and foster growth. | Ongoing |
| Increase engagement by the tourism industry in advocacy and planning activities that impact upon the industry. | a) Advocate development of infrastructure and projects that will enhance the region and extend length of stay | Ongoing |

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|---|---|---|
| Provide enhanced quality of information regarding local tourist information and experiences | a) Survey industry members regarding priority information and booking service needs seeking ways of maximising industry involvement and benefit | Short-medium |
| | b) Identify ways of showcasing regional products and services that complement local tourist industry or add to tourist experiences | Short-medium |
| | c) Investigate and implement an enhanced digital services strategy for regional tourist establishments, including use of website analytics to support the industry | Short |
| | d) Review role of Council operated Visitor Information Centre (VIC) services in terms of contemporary customer requirements and efficiency/effectiveness of current operating model – make recommendations for revised VIC services | Short |
| | e) Implement adopted VIC strategy | Medium |
| | Ensure that appropriate tourism support infrastructure and services are delivered to our region | a) Support commencement or completion of: |
| | 1) Completing of Clump Point Boat harbour facilities | Short |
| | 2) Improved marine access at the mouth of the Johnstone Rivers to Innisfail for charter craft, commercial fishing fleets and large private vessels (e.g. super yachts) | Medium |
| | 3) Upgrade to critical state tourist roads in the region | Medium; long |
| | 4) Finalisation of Council's review into alternative short stay RV accommodation across the region | Short |
| | 5) Government support for improvement and reinstatement of Port Hinchinbrook marine harbour and navigation channel facilities | Short; medium |

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| | 6) Council ongoing improvement to critical water and sewer network services to support tourism industry growth | Medium; long |
| | 7) Council ongoing support for developer contribution concessions for new tourist development that contributes to additional employment in the region | Ongoing |
| Influence regional tourist accommodation reform to more effectively cater for contemporary market demands | a) Support review of Council's Planning Scheme to limits on 2 storey development in high value tourist localities | Medium |
| | b) Support the investigation and implementation of localised master planning for tourist accommodation and services nodes/centres | Medium |
| | c) Support CCRC's reform and commercialisation of CCRC owned caravan parks | Short |
| Maintain awareness of industry 'best practice' | a) Liaise regularly with other LTOs through QTIC and STO to identify best practice principles and examples – maintain TCT member awareness through newsletters and presentations | Short |
| Positively influence tourism policy to benefit our region | a) Maintain a strong advocacy voice by attending State and RTO policy meetings | Ongoing |
| | b) Maximise participation in industry debate and formal submissions on behalf of TCT members and local industry | Ongoing |
| | c) Participate on Council policy review forums that affect regional tourism | Ongoing |
| | d) Continue to support CCRC's developer concessions for tourism and other supportive development that increases employment for the region | Short; medium |
| Provide activities that enhance visitor stays in our region | a) Identify scope to integrate a range of regional tourist activities that are able to prolong visitor stays in the region and increase the use of or need for additional accommodation | Short |



BUSINESS SUPPORT

Outcomes

- Enable industry improvement
- Deliver capability to deliver TCT's directional outcomes
- Foster partnerships

| Strategies | Actions | Timing |
|--|--|---------|
| Reconnect regional tourism businesses to nurture and strengthen partnerships | a) Establish formal partnerships and collaboration with local businesses and advocate their importance in the tourism industry. | Short |
| | b) Enhance collaboration and synergy opportunities between business, government and to encourage growth and the delivery of outcomes | Short |
| | c) TCT, in conjunction with CCRC, to meet with industry groups across the region and associated peak industry groups to discuss regional tourism issues and the roles that TCT and CCRC can play | Ongoing |
| Broaden industry representational diversity and experience | a) Increase TCT membership base to broaden strength of tourism and associated sectors | Short |
| | b) TCT and CCRC to act as facilitators for delivery of TTNQ and QTIC industry 'toolkits' | Short |
| Deliver a program that drives excellence across the industry to delivery memorable visitor experiences | a) Leverage TTNQ business toolkit program and act as industry conduit that assists operators to amplify the experiences | Short |
| | b) Enrich visitor experience through delivery of training programs available to the industry | Short |
| | c) Deliver industry services that build business capacity to deliver visitor experiences , including provision of CC region tourism photo database | Short |
| | d) Prepare a revised regional tourism industry 'Code of Ethics' based on initial 2-year performance | Medium |

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| Upskill the industry through training and educational programs for business sustainability | a) Coordinate and liaise with TTNQ, TEL, QTIC and other stakeholders to identify workforce priorities to meet the needs of the industry | Short; ongoing |
| | b) Leverage TTNQ and other industry skill development plans | Short; ongoing |
| | c) Leverage TTNQ and other industry education and mentoring programs | Short; ongoing |
| | d) Provide regular newsletter information service to TCT members and interested stakeholders | Ongoing |
| Foster and develop a coordinated approach to business booking and information sharing | a) Implement improved online services for the region's tourist industry including for shared booking and tourist booking and information platforms | Short; medium |
| Facilitate industry support through targeted funding strategies | a) Provide TCT funding assistance for identified industry business support initiatives, including those with opportunity for additional Council and other external funding | Ongoing |



MARKETING

Outcomes

- Position the Cassowary Coast as desirable, stand-alone domestic and international tourism destination
- Connect with visitors and inspire them to explore the region and stay longer.

| Strategies | Actions | Timing |
|--|--|----------------|
| Redefine the Cassowary Coast brand as an unmistakable regional tourism identity to more effectively resonate with residents and contemporary tourist and lifestyle markets | a) Re-identify the Cassowary Coast tourism region as a distinct region that aligns with the local government area | Short |
| | b) Include region and its attributes in promotional and policy material that is developed by TCT | Short |
| | c) Advocate for Council to clearly define and promote a distinct Cassowary Coast tourism region within its policy documents and promotional material | Short |
| | d) TCT to participate in any regional efforts to rebrand Cassowary Coast marketing to ensure consistency with industry best interests | Short |
| | e) TCT to investigate renaming itself "Cassowary Coast Tourism" to provide clearer regional presence and defined representation of our region | Short |
| | f) Develop key marketing themes for our region which can be incorporated in member business advertising | Short |
| | g) Develop regional marketing strategy with agreed key themes, delivery program and funding strategy, ensuring campaign is consistent with any agreed regional 'brand' | Short |
| | h) Implement an annual marketing campaign consistent with TCT's adopted annual Operations Plan | Short; ongoing |
| | i) Create a database of visual assets that showcases the region's attractions | Short |

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| Grow consumer recognition that 'The Journey Starts Here' | a) Build recognition that the region offers the top main attractions domestic and international visitors are looking for (TEQ Experience Pillars data). E.g. build recognition that consumers can access the GBR from Mission Beach/ Cassowary Coast. | Short |
| | b) Create a compelling brand story and leverage across RTO and Government channels. | Short; ongoing |
| | c) Market and support products that attract visitors to the region and create strategies to entice longer visitation | Short; ongoing |
| | d) Work with industry and community to align marketing communications to the destination brand | Ongoing |
| | e) Market the region to visitors and locals consistent with RTO destination marketing activity | Short; ongoing |
| Enhance the visitor experience across the region | a) Reach consumers in new and innovative ways post arrival to entice them to discover more in the region. | Short; ongoing |
| | b) Support and promote products and experiences that encourage distribution of visitors throughout the region. | Ongoing |
| | c) Support 'theming' of full program events and products across the region to promote collaboration and grow the quality of events. | Ongoing |
| | d) Build on the region's natural attractions by recognising and promoting its ecotourism opportunities by identifying annual priority strategies and actions that are consistent with the Queensland Ecotourism Plan | Ongoing |
| Make tourism a key part of what it is to be a part of the Cassowary Coast | a) Ensure that tourism forms a key aspect of any regional 'branding' – recognise value of tourism as an effective way of showcasing regional lifestyle and other desired attributes | Ongoing |

SUCCESSION AND GOVERNANCE

Outcomes

- Demonstrate leadership as a peak industry body for the region
- Be recognised as a highly valued, professional and credible industry body
- Be the voice for the Tourism industry in the Cassowary Coast
- Protect the region's tourism assets

| Strategies | Actions | Timing |
|---|--|----------------|
| Provide industry leadership | a) Provide guidance and intelligence on tourism matters | Short; ongoing |
| | b) Implement and adopt industry recognised strategic plan | Short |
| | c) Supporting programs to set benchmark standard for the industry (e.g. surveys, champion opportunities, TTNQ's 'Best of Queensland') | Short; ongoing |
| | d) Encourage consolidation of regional tourist organisations into a centralised LTO, where practical | Short |
| Professional, industry-recognised body that provides balanced representation across the region and industry sectors | a) TCT Board actively encourages broad industry (including related sectors) representation amongst Board members | Ongoing |
| | b) Industry endorsed succession plan | Short-medium |
| | c) Conduct in a fair, truthful and ethical manner that is impartial to personal and professional dealings (Code of ethic and business practice) | Ongoing |
| | d) Body that is led by career-oriented professionals who are passionate about tourism and their communities and represent a diverse range of industry sectors and geographical locations to avoid bias | Ongoing |
| Deliver value to industry and businesses | a) Develop membership options and delivery member benefits and services. | Short |

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| | b) Facilitate business connections and commercial opportunities | Short - medium |
| | c) Represent TCT members to industry organisations, government and community | Ongoing |
| | d) Seek methods and opportunities to improve tourism spend in the region | Medium |
| | e) Promote industry development and education | Medium |
| Maximise member benefits from TCT held funds | a) Identify clear funding strategies to maintain and maximise regional tourism industry development funding through TCT | Short; medium |
| | b) Ensure that an appropriate level of funding is spent annually on member industry benefit initiatives | Ongoing |
| | c) Seek matched funding opportunities in conjunction with Council, from other agencies and other external sources for TCT initiatives where ever practicable | Ongoing |
| Provide transparency of services to members and the community | a) Develop and implement an annual 'operations plan' and associated budget which highlights priority actions/projects and funding commitments | Short; ongoing |
| | b) Maintain regular member and Board meetings maintaining minutes and other records at all times | Ongoing |
| | c) Maintain all accounts in accordance with applicable accounting standards | Ongoing |
| | d) Show compliance with the terms of the Cassowary Coast Regional Council Service Agreement | Ongoing |
| Preserve and enhance the region's unique natural assets and, authentic character and cultural heritage | a) Support products that are in synergy with the regions heritage and natural environment. | Ongoing |



"love
the place
we live"

MANAGING THE WAY FORWARD

TCT BOARD

TCT is a membership-based incorporated organisation that is governed by a member-elected representative board. The Board includes elected-member (councillor) representatives of the Cassowary Coast Regional Council. The Board members are elected by members of TCT annually at a general meeting in accordance with the constitution of the organisation. CCRC determines its representatives to the Board separately by way of a Council resolution.

MEMBERSHIP

TCT membership is open to all businesses and individuals in accordance with the TCT Constitution. While all businesses that are directly involved in tourist accommodation and activities provision are encouraged to join, other businesses that may directly be involved in the provision of tourism services should also consider their contribution to this important sector in our region, any business synergies that they may provide or be able to leverage from tourism and the benefits that an active involvement in a stronger regional tourism network may bring.

GOVERNANCE

TCT management is the responsibility of TCT as guided by its Board. The Board is required to meet with the Council on a regular basis each year to monitor performance, review of strategic direction (including strategies and actions) and any scope for collaboration improvement. The Council as a major supporter of TCT mandates the requirement for TCT to have an agreed tourism strategy with the Council which covers the Cassowary Coast Regional Council local government area and is to be annually reviewed jointly by the TCT Board in conjunction with the Council.

The Board of TCT is able to constitute separate working groups for any specific actions identified within its agreed tourism strategy. This may consist of Board or other members and external parties as considered appropriate by the Board.

TCT encourages expansion of its memberships to build industry inclusiveness across the region. Participation of all members and other interested stakeholders, as appropriate, will be encouraged by TCT including to

Board Meetings, special meetings for member capacity building and the Annual General Meeting.

Where practicable, it is the intention that the Council will utilise strategies and actions in this tourism strategy for inclusion in or to otherwise inform its annual Operations Plan.

TCT as peak regional tourism body

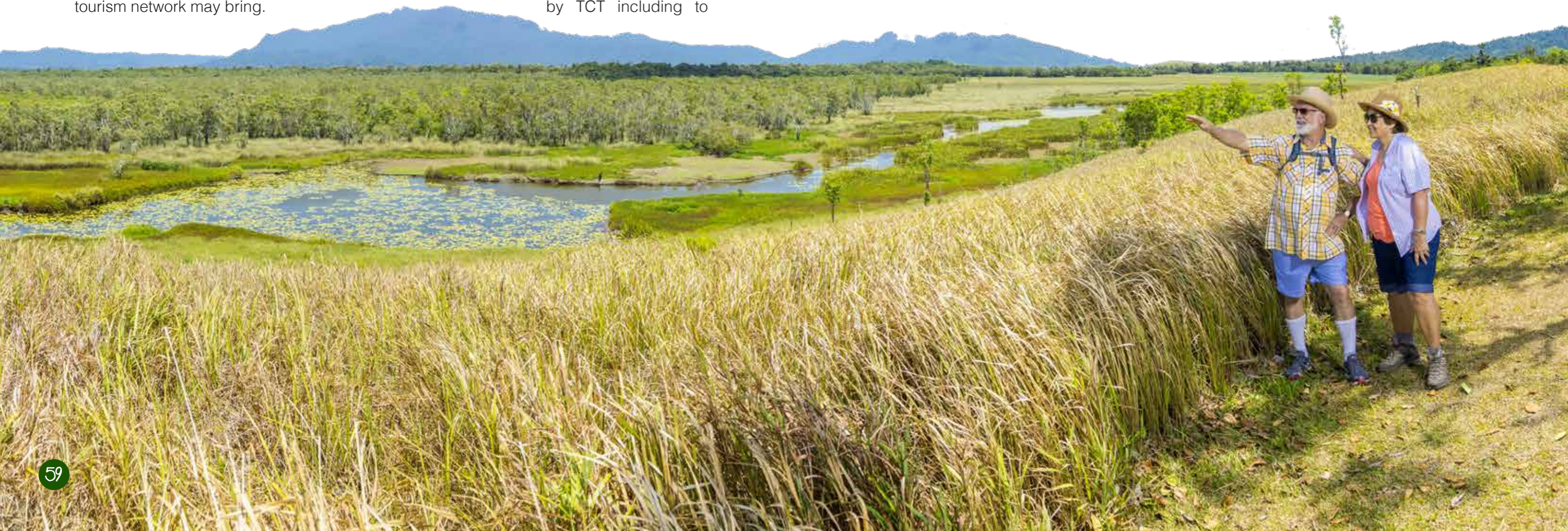
Council recognises TCT as the LTO for its local government area and as the regional peak tourism industry body that represents the industry on RTOs – notably TTNQ and TEL – and the industry represent to the State Government through Tourism Events Queensland (TEQ).

tourism strategy and recommendations that are made should undergo a consultation phase which includes interested parties representing local businesses and other regional community stakeholders as well as relevant government agency.

Any reviews or recommended decisions required to be taken by the Council, including any endorsement of recommendations where they affect Council policy formulation will need to also be consistent with Council's community engagement policy prior to the adoption of any changes.

MONITORING AND REVIEW

The agreed tourism strategy is to be monitored annually in terms of its implementation performance. A more comprehensive review is to be undertaken every 5 years, or sooner, if the Board agrees that an earlier or specific review is warranted. Any 5 yearly or other major reviews of the



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