Tablelands Regional Council

Destination Management Plan

January 2021

Tablelands Regional Council acknowledges the Traditional Custodians of the Tablelands region and recognise their continuing connection to country. We pay respect to Elders past, present and future.

TRC TABLELANDS REGIONAL COUNCIL

Contents

1 Executive Summary

The Atherton Tablelands (Tablelands) is a long-established tourism destination. Visitors from the adjacent coastal strip and Townsville region are major sources of visitors, with other significant segments including the long-haul drive market.

Day visitors make up the majority of visitor numbers, with the great majority being domestic visitors. Average spend by visitors is comparatively low, with an average spend per trip of $79 for day visitors and $97 for domestic overnight visitors.

The region is underperforming in terms of the value of tourism and hospitality compared to Queensland in terms of employment, value of output/sales and value added to the economy.

Tablelands Regional Council (TRC) has recognised that there are opportunities to drive better outcomes for tourism and has several existing strategies either directly or indirectly supporting tourism development. It also supports five well patronised Visitor Information Centres (VICs), and a contract has recently been awarded to develop marketing services.

The TRC has also recognised a need for a high-level plan to sit over current strategies and proposed direction to better align and coordinate scarce resources behind achieving increases in visitor yield and investment. This has led to this high-level Destination Management Plan.

The process adopted was to conduct a limited number of targeted interviews with industry stakeholders and TRC staff, consequent preparation and circulation of a discussion paper with a detailed SWOT Analysis (attached to this document), followed by a stakeholder workshop.

In developing the Plan, the following attributes and circumstances were considered.

As a destination, the Tablelands is well placed geographically and has strong natural assets. With Cairns as its hub, the 'Tropical North Queensland' region has a strong domestic and international profile which normally (pre Covid-19) attracts some 2.2 million visitors per annum. The Tablelands is located on three drive routes, the Savannah Way, route to Cape York and 'The Top' and 'The Great Inland Way'. It has long had a reputation for the diversity of its natural assets, beautiful vistas, rainforests, trails, waterfalls, volcanic lakes, historic background, rich farmlands and produce.

This rich diversity has long posed a problem for arriving at strong, universally accepted and differentiating market positioning. Scarce resources available for industry support and the small scale of most tourism businesses exacerbate this problem.

A differentiating feature of the region is the local road network which forms many loops and circles, as a legacy of World War II defence activities. These provide multiple optional routes for access to local tourism experiences, villages and existing trails (rainforest, rail trails and mountain bike tracks). However, these can be confusing for first time visitors.

The current mix and capacity of accommodation stock in the region has not changed significantly for many years and has been recognised as a constraint to achieving longer stays and increased yield.

Little has changed since a 2003 report included the following as a key finding:

> *While FIT travellers are catered for, the limited nature of the accommodation options limits the potential of the destination to cater for other groups and market segments. They require more flexible options capable of handling larger groups with a range of services.*
>
> (Tablelands Tourism Investment Strategy Model Report, 2003)

The mostly very small-scale tourism businesses are family operated, single operators, or have a maximum of four employees. As such they have limited resources for strategic business management, especially during peak periods of demand.

Added to this is the ageing population. The estimated median age in the TRC region was **47.4** years (2018), compared to the Queensland figure of 37.3 years (ABS), with the TRC figure having increased by 4.4 years from 30 June 2008, whereas the Queensland increase was only 1.1 years. This has impacts on succession planning and maintaining the necessary pool of industry skill sets.

The tools of cooperative effort, collaboration and partnership are essential in these circumstances.

Regional natural assets are closely associated with the Wet Tropics World Heritage Area encompassed within the TRC region. An opportunity exists to develop a collaborative working arrangement with the Wet Tropics Management Authority (WTMA), due to its interest in tourism development and consequent development of a Tourism Plan.

Collaborative opportunities extend to the number of community organisations representing diverse interests across the region. Facilitation of increased collaboration is a means of addressing scarce resources and increasing general community awareness of the importance of tourism and the contribution it does and could make to the economy.

In pursuing opportunities to drive development of the tourism industry sector, there would be benefits from accumulation of better market intelligence. Existing data is quite broad, at a high level and to some extent based on anecdotal sources. Some limited data suggests that there is a low level of awareness of the Tablelands in Cairns airport arrivals.

Marketing issues for the Tablelands include the very high cost of building market penetration in large and broadly defined markets, such as Sydney, Melbourne and international visitors. More defined sectors, such as caravan and camping and catering to short breaks are current targets. In the case of caravans and camping, national upward trends have continued despite or perhaps because of the impacts of Covid-19. Short breaks and romantic getaways targeted by quality boutique accommodation is well serviced on the Tablelands and have been achieving high occupancy levels.

Future trends, especially in view of the uncertainties arising from Covid-19 are even more difficult to anticipate than in more usual circumstances. Market intelligence will assume greater importance.

Further, gaps in existing market intelligence mean that even existing marketing is at risk of being less effective than it could be. Long standing traditional markets can change over time and require adjustments in marketing focus.

In recent years, the TRC and others in the region have recognised opportunities associated with walking and cycling. These are reflected in development of the Atherton Tablelands Rail Trail Development Plan, a collaborative CCRC-TRC Regional Trails Strategy (CCRC – Cassowary Coast Regional Council), a 2015 report by the Tablelands Futures Corporation on the market potential of cycling and mountain bike trail development and promotion in collaboration with local businesses and clubs.

While there are existing products and experiences, many of the ‘icon’ experiences are free and the scale of the Tablelands means there are often significant distances between them. Additional products would assist in providing added depth and interest to routes taken by visitors, as well as increase yield. There are many opportunities for additional product, with some under development and many others that may have potential (listed in the attached SWOT under Weaknesses).

In all cases, there need to be people motivated to establish a commercial, professional tourism operation. For this, there needs to be an evidence-based case that indicates a strong likelihood of viability.

In recognition of the key issues, challenges, and opportunities at play (page 21), the most viable overarching competitive positioning strategy for market growth is likely to involve **focus**. That is, to focus on highly differentiating features of the region (existing or possible) and focus on well-defined market segments best matching the differentiating features. This is already done to some extent, by some businesses in the region, but is not a regional strategy.

This is not to say that marketing of the diversity of the region with tags such as *the food, nature and adventure trail* should be wound back. These can support the focus adopted.

In this context, this Plan can best contribute by providing the connecting themes that assist in drawing existing strategies together in a cohesive effort that improves outcomes for the regional tourism industry and the regional economy.

The approach adopted is to limit strategies to eight considered the most strategic, practical and achievable. These are:

Choose Focus, Align Resources

This strategy is the foundation for all others. It involves choosing a well-defined, growing market based on interest and shifting the focus of effort and resources behind building new markets from broad to narrow. The logical interest group to choose is cycling, with benefits flowing to attraction of hikers.

This is about development of local routes. It would combine local road loops, existing and new trails, into specifically designed multi-experience products involving circuits and loops that integrate with attractions, products and points of high interest.

The Tablelands can utilise the diversity often spoken of as a competitive, differentiating advantage through this strategy, as it would be offering more than a track or road to ride or walk on.

Engage with Wet Tropics Management Authority

The strategy involves developing collaborative processes and initiatives between TRC and the WTMA Tourism Plan. It would seek to inspire WTMA to engage in the *Choose Focus, Align Resources* strategy.

Facilitate New Product Development

'Facilitate' is the emphasis in this strategy. It is aimed at an acknowledged long-standing weakness and barrier to increased yield. It involves building motivation and interest in investigating and establishing new commercial tourism experiences.

Facilitate Connection, Cooperation and Collaboration

This strategy involves building dialogue and connection between disparate stakeholders involved in the Tablelands region tourism industry and community groups. It bypasses the often difficult task of generating collaboration at formal organisational levels by adopting the technique of taskforces and focus groups.

Build More Comprehensive Market Intelligence

Comprehensive and accurate market intelligence is always a critical success factor for the tourism industry. This strategy is to update and improve market intelligence for the Tablelands region tourism industry, especially on traditional markets.

Improve Access to Council and Process

The role of the Economic Development Officer includes being a conduit between business and industry with TRC. This can provide a point of access for tourism business and investors for information, advice and support relating to relevant TRC processes, strategies and initiatives.

The perception gained from the targeted interviews was that tourism industry business at least are not well aware of the availability of this conduit.

Facilitate Increased Business Support

Subject to available resources, increased general support for tourism businesses could be provided through the Economic Development Officer role. This would be by way of referral to programs and resources available. This strategy is to emphasis the effectiveness of what is already in place.

Facilitate and Attract Accommodation Investment

This is a longer-term strategy. A first step involves establishing the level of interest and the conditions under which investment is most likely to be generated. The second is to monitor and where possible facilitate development of those conditions. Once monitoring indicates conditions are favourable, a business case would be called for, then pitched directly to those stakeholders that research indicates would be most interested.

An Action Plan to support delivery of these strategies has been developed (page 32).

As to monitoring and outcomes management, as this is an overarching, general strategy document, they need to be consistent with TRC systems and those set out in other relevant strategies. The objectives for the Plan are:

1. Build the visitor economy generally and increase yield
2. Increase collaborative effort
3. Increase information flows
4. Product development
5. Investment in accommodation

While each has techniques for measurement of outcomes against each, the overarching measurement of outcomes will be measured through monitoring tourism statistics derived from Satellite Account statistical trends.

Australian Government

BUILDING OUR FUTURE

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Prepared by Kleinhardt Pty Ltd in collaboration with TRC.

2 BACKGROUND

2.1 Need

Tablelands Regional Council has identified opportunities to drive tourism industry development for their region. These fall into three categories:

- Strategic destination marketing.
- Industry development strategy to facilitate investment and growth.
- Strategies to increase visitor expenditure.

These lead to a need for a Destination Management Plan (DMP), "*based on the importance of the tourism sector to our economy, opportunities for significant growth and alignment with regional, state and national focus*" (project brief). During the project, TRC awarded a contract for destination marketing to a professional marketing firm. This is therefore not a focus in this DMP.

The need for a DMP is further indicated due to the existence of several TRC strategies that directly, or at least closely relate to tourism industry development. The DMP is to sit above these as a coordinating point of reference.

2.2 Process

The processes leading to this Destination Management Plan have included one-on-one targeted stakeholder interviews, preparation and distribution of a Discussion Paper to stakeholders for comment and a stakeholder workshop.

2.3 Task & Objectives

The overall task is to create a plan to build and manage the region's visitor economy. Objectives for the DMP need to focus on effective strategies that address:

- Limitations arising from scarce human resources and funds.
- Small scale of tourism businesses.
- Need to build more experiences that produce revenues.
- Need to increase yield in a region that attracts day visitors as the major sector.
- Need to increase collaboration and information flows.
- Diversity being a strength and at the same time a weakness (there is no agreed single icon on which to base positioning and profile).

References to these recur in the document.

3 DESTINATION ANALYSIS

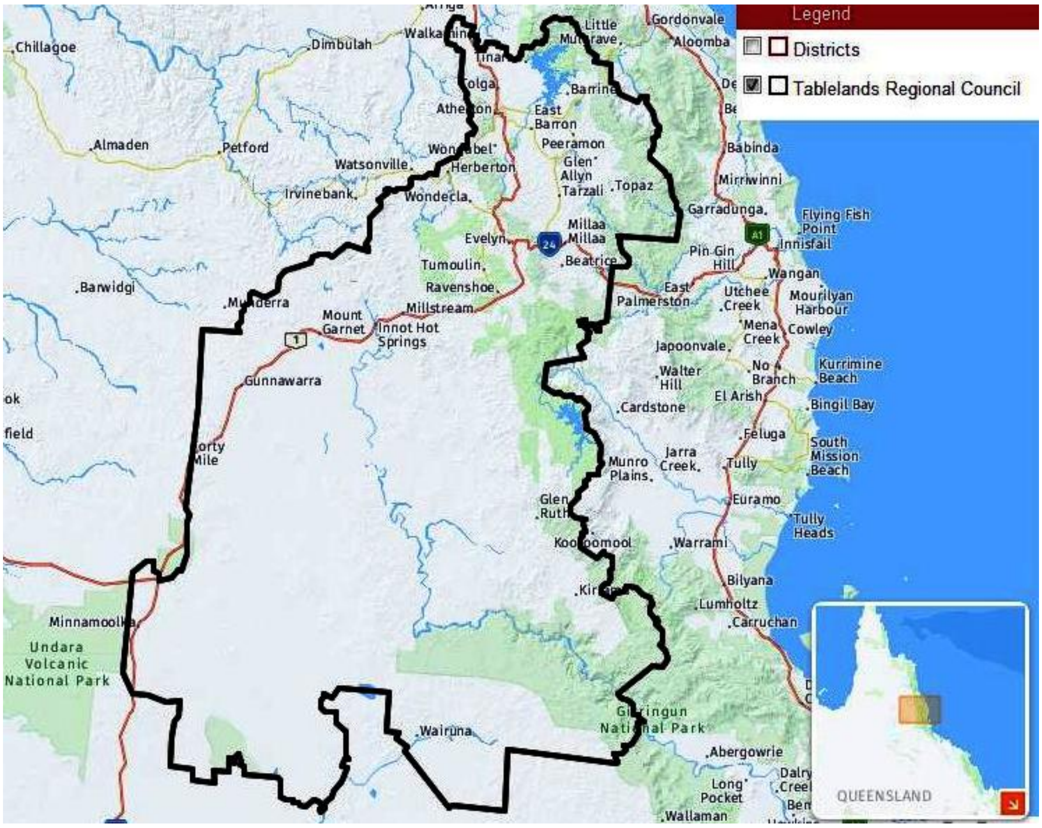
3.1 Geographic

Tablelands Regional Council (TRC) is located in Far North Queensland about 100km from the Cairns CBD. It covers an area of 11,419 Km^2, with an estimated population of 25,575 (ABS 2019). A detailed profile and statistical information is provided on the Council website (profile.id.com.au/tablelands).

An area map outlining the TRC border is included below.

As the name indicates, it is a part of a wider elevated plateau adjacent to the coastal strip which encompasses the urban centres of Port Douglas, Cairns, Innisfail and Tully. The TRC area features distinct elevations rising in stages from Walkamin in the north (593m above sea level) to Ravenshoe in the south at 930m. This contributes to climatic differences having an impact on scenic attributes and experience of place, as well as providing growing conditions for a diversity of crops.

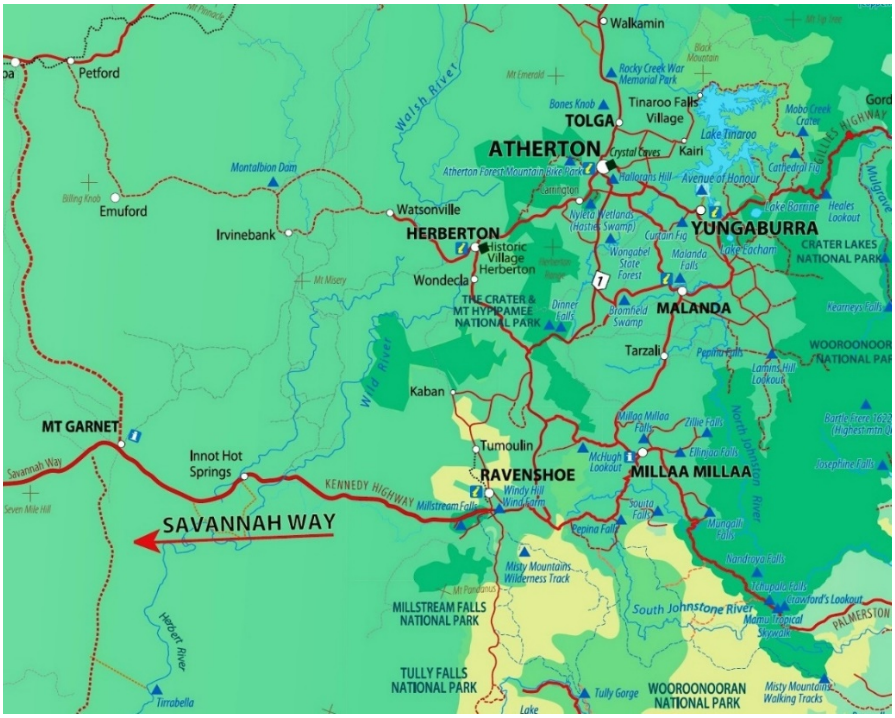
Tablelands Regional Council Border



The areas south of Millaa Millaa and Mount Garnet have far less infrastructure and population.

A differentiating feature of the region is the local road network which forms many loops and circles. This is due to construction of many secondary roads during World War II to serve troop camps and bases in the area. These loops (indicated in the map on the following page), can be confusing for visitors, but also provide opportunities for creation of trails, connecting attractions and experiences.

The larger scale map below illustrates this:



Travellers on long haul journeys are likely pass though the region if following popular and designated routes. The *Great Inland Way*, commences in Sydney, includes Outback Queensland and officially ends in Cairns, passing through the TRC area. The Savannah Way, Cairns to Broome also passes through the TRC area. Those travellers from southern origins may also choose to drive up the Palmerston Range Road, through the TRC area on their trip to Cape York or the Gulf.

3.2 Attributes

3.2.1 Natural Assets

The 'Tablelands' has a long-held reputation as a place to visit for recreation, which began not long after the early days of settlement on the coast in the 1860's. Cairns quickly became a visitor destination, with visitors travelling on coastal steamers from Brisbane and later in trains. The Tablelands' reputation for beauty and as a 'cool mountain retreat' grew rapidly with local coastal residents and regional visitors alike.

The descriptions of natural assets associated with the Tablelands often include volcano lakes, waterfalls, rainforests, green rolling hills, beautiful farmland and stunning views. Added to these are some icon sites and places, such as Tinaroo Dam, and the Curtain and Cathedral fig trees.

These visual assets are no doubt world class. Added to interesting villages, food experiences and history, together with recreational opportunities such as walking, cycling and water sports, provides the destination with broad appeal.

The destination's beauty and diversity has wide appeal and the increasing popularity of experiencing pristine nature and places are positive for the region. However, it is always difficult to differentiate such a region in a highly competitive marketplace such as tourism. There are many beautiful destinations in Australia and globally. For those 'in the know' who typically live close, the Tablelands is a natural choice. Attracting new markets is much more difficult without a specific, stand out, marketing 'hook'. A second issue is that while these natural assets are of very high quality, they are predominantly free to experience and lead to low yield for the overall tourism sector.

3.2.2 Economic Profile

TRC include a comprehensive economic profile for the area on its website (economy.id.com.au/tablelands).

The region has a specialisation in agriculture, also the largest employer. Some comparative idea of the value of agriculture and tourism to the region is provided by the following. These do not cover the same time period, nor are the measures of value necessarily exactly comparable:

- In 2015/16, the total value of agricultural output in Tablelands was $256m
- In 2018/19, the total tourism and hospitality sales in Tablelands was $110.6m

The size and diversity of the agricultural sector provides tourism opportunities in the form of farm tours, farm-stay experiences and boutique products, including, dairy products, fruit wines and other value-added products. On the other hand, the skills base and traditions of the region have an emphasis on agriculture, which tend to increase barriers for tourism to achieve attention.

According to Tourism Research Australia, there were 294 businesses classed as tourism businesses in the TRC region, out of a total of 2,737 (2018-19). Of these, 214 tourism businesses had zero to 4 employees (72.8%), 63 had 5-19 employees, while 19 had 20 or more employees.

3.2.3 Access

The region has multiple points of access by road. From the south the Palmerston Highway provides easy access from the Bruce Highway at Innisfail. It provides a scenic option for those heading north and those who wish to bypass Cairns. The next option from the coastal strip heading north is the Gillies Range Road, branching at Gordonvale. This is a historic road, which is narrow, with many sharp curves, but has views back to the coastal strip.

At Smithfield, 15 minutes north of the Cairns CBD, the Kuranda Range Road links to the Tablelands at Kuranda, the internationally recognised tourism ‘village in the rainforest’, located in Mareeba Shire. The Skyrail Rainforest Cableway provides a tourist link between Smithfield and Kuranda, while the Kuranda Scenic Railway operates from several stations in Cairns to Kuranda.

Kuranda can be seen as either a barrier or a portal. It is a portal in that it draws large numbers of visitors to an entry point for the Tablelands. It can provide a point of interest on an itinerary for self-drive and tour groups. It acts as a barrier due to very strong, long-established closed loops between Kuranda and Skyrail, Rainforestation (with its bus fleet), Scenic Railway and (until recently) Tjapukai at Smithfield.

Just north of the popular destination of Port Douglas, (58km north of Cairns), the Rex Range Road, provides the shortest range road access (7km). However, this point of access is well north of the TRC region and involves travelling a significant distance south through Mareeba Shire and dry landscapes. There appears to be no readily available data on visitors originating from Port Douglas. The assumption is small numbers. Potential is unknown.

The Peninsula Development Road (Mulligan Highway) joins the wider Tablelands road network, providing access to Cape York and those seeking to ‘make it to the top’. Traffic includes long haul travellers and locals on hunting, fishing and camping expeditions. Long haul travellers will be more likely to travel through the Tablelands region rather than take the coastal route via Port Douglas, especially if towing caravans or campervans. The return journey must also be along the Peninsula Development Road. The extent returning travellers could be an opportunity for the Tablelands region has not been defined.

The Great Inland Way (Sydney to Cairns), enters the Tablelands from the west. This is predominately an 'Outback Adventure', for which there is increasing demand. Preparation of this document did not at the time reveal statistics particularly relevant or useful for the Tablelands.

The Savannah Way has visitor flows predominately east to west. Visitor numbers entering from the west are unknown, but maybe significant.

3.3 Infrastructure

3.3.1 Accommodation

The current mix and capacity of accommodation stock in the region has not changed significantly for many years. It encompasses:

- Traditional motels
- Country hotels
- Private holiday rental properties
- BnB style properties and cottages from single to multibed capacity, with several of high standards
- Commercial caravan parks
- Public RV and camping sites
- One large resort facility (96 beds).

Current accommodation stock and capacity in the region is estimated as 861 beds, excluding caravan and camping sites, and recent motel extensions in Atherton.

Issues associated with available stock are:

- There is no resort style hotel linked into national and international marketing and distribution systems.
- Only one property has a suitable configuration and capacity to take larger tour groups.
- One resort is of a contemporary standard but configured as self-contained holiday units.
- Some of the stock is either run down or not to standards or in a style commonly expected by tourism visitors.
- A major expansion in BnB style properties would not significantly increase capacity.

Accommodation capacity is fundamental to a region's ability to extend visitor length of stays. It has long been considered an issue for the Tablelands region and been revisited several times. For instance, a 2003 report included the following as a key finding:

> *While FIT travellers are catered for, the limited nature of the accommodation options limits the potential of the destination to cater for other groups and market segments. They require more flexible options capable of handling larger groups with a range of services.*
>
> (Tablelands Tourism Investment Strategy Model Report, 2003)

3.3.2 Public & Recreational Facilities

Every region has public and recreational facilities used by both the community and visitors. In regional areas, Local Government is inevitably called upon to play a greater role than in major urban centres. While visitor use of facilities can be an additional burden, regions with major tourism sectors tend to find opportunities to develop public facilities beyond what the resident population could otherwise justify.

TRC direct and indirect investment in the tourism industry is significant. Investments include public amenities, community events, recreational assets and public amenities, such as:

- Galleries and museums
- Heritage sites
- War memorials
- Event venues
- Pioneer cemeteries
- Parks and gardens
- Conservation reserves
- Rail Trail / walking tracks

Visitor Information Centres (VICs) operated by TRC, Recreational Vehicle (RV) facilities and caravan parks are investments primarily directed at visitors.

There is a vested interest for TRC in optimising return on this investment. Returns are a mix of social / lifestyle and economic returns for the community.

3.4 Key Stakeholders

3.4.1 Tourism Atherton Tablelands

The Local Tourism Organisation (LTO), Tourism Atherton Tablelands (TAT), has a membership of some 180 members. Its area of operation also includes Mareeba Shire, which has 244 tourism businesses (ABS Regional Profiles). Its membership base accordingly represents about one third of all businesses in its area directly in tourism. This is quite strong, as LTO membership is typically much lower as a proportion of tourism businesses in their region.

The TAT operational budget is small, enough only for website maintenance, digital marketing and facilitation of membership activities. Its current budget will not support any significant destination marketing.

The organisation has a current strategic plan *Tropical Tablelands Strategic Plan – 2019 -2024.* The Plan inevitably covers some similar areas to this document, with both documents being consistent. The Plan defines four Hero Experiences which have tended to provide the positioning for the region for many years:

INSPIRING NATURAL WONDERS

Geological wonders including crater lakes, limestone caves
World Heritage-Listed Landscapes
Unique Wildlife including Lumholtz Tree Kangaroo and a Birdwatcher's paradise

GOURMET EXPERIENCES

Rich Agriculture land producing a range and high quality of product
The offering of food, wine, local cuisine and produce
Food and wine trails to explore

DIVERSITY OF TRAILS

World-class Mountain Bike Trails
A range and network of adventure trails including hiking, walking, horse-riding, mountain biking, 4WD and road cycling

OUR HERITAGE

Natural places: scenic landscapes; rainforests; flora and fauna
Indigenous Sites and Culture
Historic Places: towns and historic landscapes; historic villages; mining history; war history; museums

(*Tropical Tablelands Strategic Plan – 2019 -2024*)

There are three strategies adopted in the Plan, with associated actions:

1. Leadership and Advocacy
2. Build Our Tourism Industry
3. Destination Marketing

Decreasing revenue from the two local Councils will impact the LTOs ability to deliver on its plan.

3.4.2 Tourism Tropical North Queensland

The Regional Tourism Organisation (RTO), Tourism Tropical North Queensland (TTNQ), brings together the tourism industry to drive the value of the visitor economy through destination marketing, networking events, public relations and advocacy. Stories are founded around reef, rainforest, Indigenous, outback, lifestyle and adventure. They work with Cairns Regional Council, tourism members, corporate sponsors and the four LTOs in Tropical North Queensland including Tourism Port Douglas Daintree, Tourism Atherton Tablelands, Tropical Coast Tourism and Savannah Way Limited.

3.4.3 Tablelands Regional Council

The Local Government role in tourism is traditionally a support and facilitation role. In regional areas, especially featuring small scale businesses, the role tends to involve some 'mission creep', due to Council being the organisation with the strongest capability and resource base. Investment attraction is often a Council goal. In the case of TRC, functions and activities involving tourism are:

1. Employment of an Economic Development Officer, with responsibilities including tourism, industry capacity building, workforce training and development, and business support.
2. Employment of a Coordinator - Tourism Culture and Events (includes oversight of VICs and events).
3. Ownership and operation of five Visitor Information Centres.
4. Development and maintenance of public infrastructure utilised by visitors and community alike. (Listed before).
5. Development and implementation of strategies (with staff resources) that directly involve and / or impact tourism. Current strategies are:
    a) TRC Event Strategy
    b) TRC Sport and Recreation Plan
    c) TRC RV Management Strategy
    d) TRC Rail Trail Development
    e) CCRC-TRC Regional Trails Strategy
    f) TRC Transport Strategy
    g) TRC Tourism and Community Signage Strategy
    h) TRC Cultural Plan
    i) TRC Economic Development Strategy
6. Providing financial support for Destination Marketing.
7. Facilitation of business and industry opportunities.
8. Membership with Tourism Atherton Tablelands, Tourism Tropical North Queensland and other applicable industry partnerships.

3.4.4 Visitor Information Centres

TRC operates five Visitor Information Centres (VICs). There is an international discussion on the appropriate role and future of VICs in a digital age in the contemporary tourism industry. TRC has already commissioned a professional strategic review of its VICs, undertaken by 'The Tourism Group' in 2018. It found that five VICs were appropriate in the circumstances of the Tablelands region and contemporary tourism and should be retained. It recommended some locational and operational changes. A key observation was that:

> *Not every VIC needs to be an attraction but co-location is an effective formula, whether it is with an existing feature or attraction, providing an appealing café, being within a precinct where visitors want to be, or developing a new attraction and incorporating a VIC within that facility*
>
> (Strategic Review – Visitor Information Centres 2018)

A network operational model was proposed, with the Report observing *the five VICs should therefore work collectively, not as silos in isolation.* The network involved a hub and spoke model, with Atherton as the hub, rationalising administration. It would be the base for coordination of visitor services and events program. The recommendations included:

> *A Tourism Liaison Officer is needed to organise periodic workshops on marketing and social media training for local operators, networking events to build industry cohesion, famils for VIC staff and volunteers, plus mentoring for other centres and local traders, assisting Indigenous groups and new tourism operators wanting to launch new products in the region to make them market ready*.
>
> (Strategic Review – Visitor Information Centres 2018)

3.4.5 Tourism Businesses

Tourism businesses in the region are mostly very small scale. They are family operated, single operators, or have a maximum of four employees (probably casual). As such they have limited resources for strategic business management, especially during peak periods of demand, due to being fully engaged as operatives in service delivery. These constraints include financial and human resources available for marketing. Website management and digital / social media platforms take time to manage effectively. Some have the advantage of being able to target a narrow and / or very well-defined market. Special interest websites and narrow / well defined marketing channels enable effective relatively low cost marketing.

The scale of most businesses and owner manager style operations also severely limit the ability of the local tourism industry to offer career paths for young people. The TRC age demographic, coupled with this indicates additional likely issues.

The estimated median age as of 30 June 2018 was **47.4** years, compared to the Queensland figure of 37.3 years (ABS). The TRC figure increased by 4.4 years from 30 June 2008, whereas the Queensland increase was only 1.1 years.

Implications are:

- Difficulties in succession planning, increases risk of business closure on owner exit.
- Increases need to attract people from outside the TRC region in the case of business sales and start-ups.
- Limited pool of skills to support expansion and / or provide relief for managers.
- Limited local experience and skills to support new tourism business start-ups.

3.4.6 Wet Tropics Management Authority

The Wet Tropics World Heritage Area encompassed within the TRC area is a highly important element of destination assets and appeal. Areas involved include the crater lakes, Wooroonooran National Park, Danbulla adjacent to Tinaroo Dam, areas around Millaa Millaa, Ravenshoe and others.

Beyond its responsibilities in preserving and protecting the World Heritage area, the Authority is active in examining tourism as part of its management mandate. This has included a recent comprehensive stakeholder consultation program to inform a Tourism Plan.

The Plan is to:

- Better tell the story of how unique the Wet Tropics are
- Show new ways to experience the Wet Tropics
- Outline new places to experience the Wet Tropics
- Suggest ways to deliver interpretation and enhance experience at regional/precinct level
- Show where iconic places are/might be
- Highlight opportunity – show what great nature and culture-based tourism looks like
- Recommend ways that Rainforest Aboriginal People can participate in and benefit from tourism
- Suggest actions for training, employment and the provision of business development resources
- Propose a mechanism for ongoing open and transparent communications between tourism and Rainforest Aboriginal Peoples
- Provide a roadmap to attract great nature-based tourism proposals that share benefits with communities

There are clearly strong synergies and mutual areas of interest between this and TRC tourism development.

3.4.7 General Business & Community

Fostering a good appreciation of the Tablelands tourism industry across the community increases awareness of:

- The contribution it makes to the economy
- Flow on benefits
- Current initiatives, strategies, objectives and potential benefits
- Opportunities for participation and new business opportunities

This appreciation can only strengthen the industry with community recognition that tourism pervades all industry sectors. The Tablelands is fortunate in having many business and community organisations available as platforms to facilitate greater cross sector understanding, collaboration, local investment and tourism business development. TRC lists the following as playing an active role in local economic development:

- Atherton Tablelands Chamber of Commerce Inc
- Malanda Chamber of Commerce
- Ravenshoe and District Chamber of Commerce Inc
- Herberton Community Interaction
- Herberton Business & Tourism Association
- Tablelands Futures Corporation

- Tourism Atherton Tablelands (LTO)
- Yungaburra Association Inc
- Start-up & Innovation Tablelands

3.4.8 Adjacent Regions

Regions with common borders with TRC can be considered both competitors and partners. It is important for the tourism industry to get the balance right. As is often said, tourists do not recognise regional borders. Experiences and itineraries will overlap and overflow these formal borders.

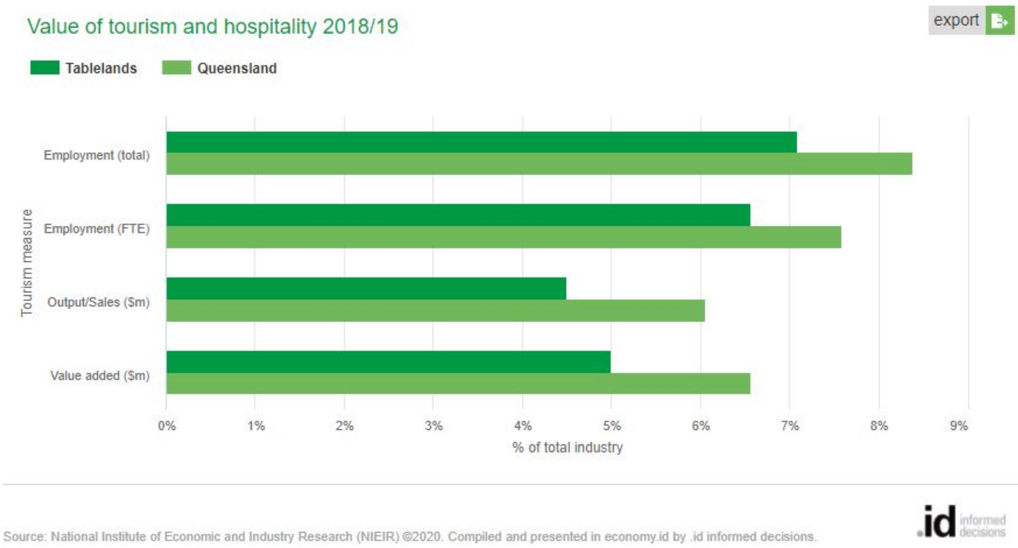
3.5 Visitor Data

3.5.1 Tourism Research Australia

Tourism Research Australia is a major source of visitor statistics, assembled from National Visitor surveys of both domestic and international arrivals in destinations, plus ABS Satellite accounts. Some details are provided on the TRC website.

Key information drawn from this data is:

- **Overall**: Trends up until the onset of Covid-19 can generally be described as stable as to employment, value of sales and value added, with some fluctuation year on year. This suggests little progress in further development of the industry **overall**. Benchmarks against Queensland as a whole indicate the industry lags behind averages in key measures, as the following table demonstrates:



- **Day Visitors**: The five-year average is **433,636** up to 2019/20. The trend has been for small annual increases. However, for 2019/20, the number was 476,636, close to 10% above the average. It seems reasonable to assume this can be attributed to Covid-19 limitations generating more day trips from residents of the coastal strip - Cairns to Cassowary Coast.

- **Domestic Overnight Visitors**: The five-year average is **172,039** visitors with an average length of stay of 3.3 nights, producing 579,109 visitor nights.

- **International Visitors**: The five-year average is **18,124** visitors with an average length of stay of 9.7 nights, producing 169,926 visitor nights. While international overnight visitors represented only 9.6% of overnight visitors, they provided 22.7% of the nights.

- **Length of stay distortions**: Average length of stay for international visitors recorded may include seasonal farm workers. The proportion who are referred to as 'backpackers' and 'gap year' travellers are budget conscious but do explore and spend significant amounts over the period of their stay. Pacific Islands workers are more likely to stay on farm and save all income. No data is readily available. An additional distortion in the statistics is that a proportion of estimated international visitor numbers may have been day visitors. No breakdown is available.

- **Length of stay volatility**: For both international and domestic visitors there are significant year on year variations in length of stay, more so than in numbers of visitors. The following tables illustrate:

Domestic Overnight

Tablelands - 2010/11 to 2018/19	Tablelands			
Year	Visitors	Visitor nights	% Change from previous year	Average length of stay (days)
5 year average	172,039	579,109	--	3.3
2019/20	178,675	446,118	-43.2	2.5
2018/19	209,125	785,242	+59.0	3.8
2017/18	149,399	493,885	-37.1	3.3
2016/17	168,032	784,996	+103.7	4.7
2015/16	154,962	385,303	-9.8	2.5
2014/15	144,063	427,206	+65.1	3.0
2013/14	98,274	258,720	-47.8	2.6
2012/13	167,766	495,565	-12.5	3.0
2011/12	201,024	566,582	--	2.8

International Overnight

Tablelands - 2010/11 to 2018/19	Tablelands			
Year	Visitors	Visitor nights	% Change from previous year	Average length of stay (days)
5 year average	18,124	169,926	--	9.7
2019/20	15,609	179,162	+9.8	11.5
2018/19	22,651	163,177	+1.0	7.2
2017/18	22,266	161,582	-30.8	7.3
2016/17	15,553	233,659	+108.5	15.0
2015/16	14,543	112,049	-28.1	7.7
2014/15	11,151	155,765	-11.4	14.0
2013/14	15,132	175,884	+34.2	11.6
2012/13	15,024	131,100	-29.9	8.7
2011/12	14,189	186,964	+4.2	13.2
2010/11	19,263	179,450	--	9.3

- **Low yields**: Tourism Research Australia data supports the common understanding that **taken as averages**, Tablelands region visitors produce low yields. For day visitors average spend per trip of some $79 is low, when considered that such calculations usually include the cost of fuel, which may not be purchased in the region. Similarly, average spend per night for both international and domestic overnight visitors (some $97) is also modest, probably skewed to RV and backpacker visitors. B&Bs and other quality accommodation providers have much higher yields.

3.5.2 CQU Survey

A 2019 Central Queensland University survey with a limited sample of Cairns domestic airport arrivals (includes international travellers) indicated that just under 25% of respondents had visited the 'Atherton Tablelands'. Included in this would have been respondents who visited only Kuranda or Mareeba Shire and not the Tablelands region. Respondents indicated that the main sources of information prior to their visit were:

Domestic visitors:	Been before (60%)
	Friends and family (42%)
	Internet (32%)
International visitors:	Internet (50%)
	Friends and family (36%)

3.5.3 Visitor Information Centres

Tablelands visitors appear to make higher use of Visitor Information Centres (VICs) than for Queensland overall. For the year ending 2018, TEQ research found that overall, 3.7% of Queensland's visitors stopped at a VIC. The Tablelands (including Mareeba), figures for 2018 indicate that there were 217,200 VIC visitors, which would represent some 23% of visitor numbers. The reservation is that it is not known if there is double counting due to visitors visiting more than one VIC during their trip.

Nevertheless, these figures point to there being value in collaboration between VICs in promoting the experiences available beyond their immediate area. This could contribute to increased yield and length of stay.

3.5.4 Data Weaknesses & Knowledge Gaps

While there is quite broad data on visitors, it is quite high level and raises questions about information that would be useful in better guiding strategic direction for the industry:

- Some 433,600 domestic day visitors annually presumably include recreational visitors, visiting specifically for activities such as mountain biking, walking and water sports. Anecdotally, Tinaroo Dam is considered a popular destination for locals to enjoy weekend water sports. It is not clear what yield these visitors deliver, or if they do participate, or are interested in other than their primary activity. An analysis would be useful.
- The 172,000 domestic overnight visitors also include recreational visitors, plus locals on a short break and others from regional North Queensland, especially Townsville. The Tablelands region is anecdotally a popular destination for locals to camp. Again, an analysis would be useful.
- Overnight visitors include long haul travellers with caravans, campervans and motor homes. These have to date been considered as one sector - 'grey nomads'. While this group of travellers most likely includes a high proportion of older people, typically retired couples, this traveller group is increasingly more diverse, with more diverse interests, preferences and needs. For instance, there are more families and working couples in higher income brackets.
- One accommodation provider interviewed reported large numbers of their visitors travelling alone. A high proportion are apparently single girls and older women. If this is a trend impacting the region, it would be useful to know the extent for positioning, target marketing and product / experience development.
- Individual operators – accommodation, tours, activities, attractions have a good appreciation of their current markets. However, this knowledge could be used to enhance regional data to produce more in-depth market intelligence for the benefit of the region. In general, the region does have a good broad appreciation of its visitor **sources**, described as:
    - Day trips, Cairns region locals.
    - Day trips, Cairns region visitors (domestic and international – mostly self-drive, with a few specialised small bus tours).
    - Short breaks from Townsville and inland areas.
    - Short breaks from Cairns region locals.
    - Long haul drive market (400km+).
    - Working holiday makers (domestic and international).
    - Small numbers of EU sourced tourism visitors on longer stays.

  More in-depth information on each would be an asset, as noted in sections above.

3.6 Target Market Sectors

Market sectors can be defined in several ways. These can include pre-departure location, demographic, purpose of visit, or interests.

3.6.1 Current Perspectives

An issue is the wide variety of target market definitions and perspectives in circulation and promoted. The strength of having a wide variety of assets – 'something for everybody' can become a weakness. It may dilute effort and resource allocation, confuse markets and work against the need to stand out from the competition.

Conventional wisdom has been to broadly identify target markets by point of departure, (listed in 3.5.4). The largest proportion of visitor numbers are acknowledged to be residents of the coastal strip – Cairns region south to Townsville.

Importantly, these visitors have the greatest potential to generate repeat visits, likely to represent the greatest return on investment in terms of marketing cost.

The LTO (Tourism Atherton Tablelands), refers to target markets in their *Tropical Tablelands Tourism Strategic Plan 2019 – 2024* (page 13) as:

- Fully Independent Travellers (FIT)
- Grey Nomads
- Education Tourism

Emerging Markets and Opportunities are listed on the same page as:

• Domestic markets -Sydney, Brisbane, Melbourne	• Geotourism
• Coach Groups	• Agritourism
• Inbound Tourism / Trade Ready	• Indigenous tourism
• Japanese Tours (aligning with local produce)	• Mountain biking tourism
• Weddings	• Adventure tourism
• Events	• Birdwatching markets

Covid-19 has of course altered this perspective for the foreseeable future, especially in the case of international source visitors.

The Hero experiences typically adopted in targeting markets (listed in 3.4.1) reinforce the diversity of experiences available. *Tropical Tablelands Tourism 19/20 Marketing Snapshot* adopts the tag "*Discover Perfect*". Another report commissioned by TRC (*Marketing Project Click Story Project*), proposes a unifying descriptor as:

Atherton Tablelands - The food, nature and adventure trail for TNQ

The introductory comment in the same report reinforces the issue arising from diversity of assets and diversity of stakeholders using different positioning statements and individually pursuing promotion of their particular product / interest group:

The issue in one word:
We need a strong, consistent story for Atherton Tablelands to encourage higher and longer visitation.

Compounding the issue are:

1. Weaknesses in market intelligence on existing visitor segments (refer section 3.5.4).
2. Small individual businesses with limited marketing budgets, maybe also limited expertise, adopting diverse marketing messages.
3. Limited regional marketing budget to develop profile in new and / or larger marketplaces.

3.6.2 Cycling

Cycling, including mountain biking is one target market receiving attention at the levels of the Tropical North Queensland region, Tablelands region, other adjacent sub-regions and individual businesses and groupings. A caution is that regions across Australia are also well aware of the potential, with many building infrastructure and mounting well-funded marketing campaigns.

Nevertheless, of all the significant target markets for the Tablelands identified by activity, this has probably been the fastest growing in recent years.

Cycling is now Australia's fifth most popular sport according to Sport Australia (ambmag.com.au/news/cycling-is-australias-5th-most-popular-sport-524426). It was previously number four. However, the decreased participation rate seems at least partly due to falls in participation by children. Participation by older Australians is still indicating upward trends (National Cycling Participation Survey 2017), but the growth rates reported in the first decade of the century have levelled off.

In 2017, almost 1.2 million bicycles were purchased in Australia. There was a cycling participation rate of around 34.2%, a slight decrease from the previous year.

A 2015 analysis report by Tablelands Futures Corporation summarised the market potential at the time as:

- There were 2.6 million trips taken by Australians on bicycles in 2019 (Austrade).
- Cycling is the fourth most popular physical activity for adult Australians.
- 814,000 people ride a bike in Queensland each week – 18% of residents.
- Nearly 60% of Queensland households have access to a bike.
- In 2010 Australians bought more than 1.3 million new bikes, compared to 1 million new cars, making it the eleventh year in a row that bicycle sales outstripped motor vehicle sales.
- In 2009 more than 364,000 Queenslanders rode a bike for sport, recreation or exercise, an 11% increase on the previous two years.

Mountain Biking – The benefits to the Atherton Tablelands, 2015, Tablelands Futures Corporation

The analysis report includes descriptions and statistics of the benefits and flow on benefits to a region (including the Atherton Tablelands) of mountain biking.

The SWOT provided in the report was:

SWOT ANALYSIS

STRENGTHS	WEAKNESSES
• Existing world-class trail networks with land use agreements already in place (infrastructure) • Natural environment and temperate climate • Proximity to Cairns • Established and pro-active mountain biking clubs • Trails in close proximity to towns and amenities • Feasibility studies already completed including trail mapping • Whole of region (TNQ) promotion activities in place through RideCairns	• Lack of product knowledge • Lack of information – maps, brochures, signage • Divided community - politics • More communication between clubs and the community on what is currently available, events and amenities • Rail trail surface not ideal connecting Mareeba and Atherton • Lack of funding
OPPORTUNITIES	**THREATS**
• Existing events – local, national and international • Media development to promote mountain biking specifically • Whole of region (TNQ) promotion activities in place through RideCairns • Existing tools available to local businesses to capitalize on the cycling tourism market • Affordability - great value for money	• Lack of understanding of how tourism affects local economy • Other regions are quickly embracing and delivering initiatives to attract mountain bike tourists – throughout Australia • Lack of support to embrace and support the annual Croc Trophy signature event and therefore the region could loose the event to another region • Reliance on volunteers to manage trails

The LTO, Tourism Atherton Tablelands has a 2014 document on its website, providing information and advice for businesses wishing to engage with cyclists and build this visitor market. The Far North Queensland Regional Organisation of Councils has a 2015 Mountain Bike Strategy which includes a trend analysis and roles and responsibilities for key stakeholders (page 6). Page 16 makes the following observation:

> *This again reinforces the need for this Strategy to provide clear, region-wide priorities for the development of a coordinated network of trails and experiences across the Region including mapping the trails*.

The strategy includes other findings and extensive recommendations.

Also relevant to cycling and mountain biking are the following strategies (also referred to in 3.4.2):

- Regional Multi-Use Trails Strategy (2019)
- Tourism Infrastructure Prioritisation Strategy (2019)
- TRC Sport and Recreation Plan 2019-2024
- Atherton Tablelands Rail Trail Development Plan (2013)
- TRC Event Strategy + Action Plan 2018-2021
- TRC Transport Strategy 2019-2024

These collectively add up to a maze of overlapping findings, recommendations and strategies, often also undertaking analyses of similar material and subject areas.

3.6.3 Walking

Walking, providing exercise, together with an immersive experience of nature has long been recognised as a popular activity. There is a long established, upward trend of participation globally. The activity can range from a short walk to a challenging multi-day hike. Iconic long-distance tracks attract thousands and in some cases hundreds of thousands of participants each year. **Long-distance** tracks especially provide economic flow on benefits to adjacent communities through accommodation, food and supplies, as well as expenditures on local tourism product – tours, souvenirs, entry fees, etc.

There is a plethora of reports on this activity and its potential has been recognised in the Tropical North Queensland region in current strategies (as above) and development activities.

There is significant investment, such as in the Wangetti Trail in Far North Queensland. A major business case was completed for this trail in 2018. (PWC, *The Wangetti Trail Business Case*, 2018, prepared for Department of Innovation, Tourism Industry Development and the Commonwealth Games Special Projects Unit). The proposal is to cater for both walking and mountain biking.

An analysis of the '10 Greats Walks of the World', was an element of feasibility assessment of a Cape York Dreaming Trails concept in 2009-10. This identified the key success factors attributed to these 10 great long-distance walks:

1. An iconic destination and / or there is a famous landmark associated with the walk
2. Pristine wilderness, immersion in nature, isolation experience, sighting mega or iconic fauna
3. High scenic values, exceptional photographic opportunities
4. A long tradition, with a cultural / spiritual base
5. Physical challenge
6. The prestige and or personal satisfaction from having done an iconic walk
7. Opportunity to experience different cultures

(Kleinhardt, *Customer Research Services for The Dreaming Trail*, October 2009, for the then Department of Environment, Resources and Mines)

While short walks may add to destination appeal and contribute to visitor numbers, they are not likely to significantly add to visitor yield, while overnight and longer walks can. The Tablelands may be able to deliver many of the key success factors above, presenting an opportunity on the back of the wider regional focus and resources allocated to marketing and promotion. This requires focus on designing the experiences offered to meet these key success factors as closely as possible, while also identifying differentiating features. The possible elements of Aboriginal culture, wild pioneer stories (graveyard tours) and food and farm experiences all potentially tie into the key attributes.

3.6.4 Other Special Interest Markets

There are other markets based on special interests which fit with Tablelands assets and aspirations. Examples are birdwatching generally and the Atherton-Herberton Historic Railway (athrail.com) as a specific experience. A feasibility study is nearing completion in relation to this railway experience as a viable tourism product.

The emphasis on long distance walking and cycling is not to ignore other special interests. It is rather that these two have been demonstrated as having large markets and have potential to significantly impact yield and length of stay. Other special interests mesh well with these, given the strategies recommended later.

3.6.5 Events

Events target any number of market sectors – specific interest groups and general markets, rather than being a target market itself. They are included separately here due to their ability to:

- Impact length of stay
- Provide good yields per visitor
- Perhaps more importantly attract attention to the region and its assets.

Counter to these benefits, events are periodic and typically require a huge effort of many volunteers.

Immediate impacts and flow on effects are quite well-known and can be substantial. Illustrations are:

- The 2016/17 increase in visitor nights was in excess of 100% on the previous year.
- The 2014 Crocodile Trophy event had over 7 million overseas viewers watching the TV coverage, plus the domestic audience. The value in regional marketing was enormous.

TRC has an Event Strategy. Key weaknesses and challenges identified in the Strategy are:

- Financial sustainability
- Limited accommodation
- Limited food providers and not open at times to suit visitors
- Limited collaboration, competing dates and messages
- Scarce funding
- Limited human resources and skill sets, heightened due to reliance on volunteers
- Cost of insurances

3.7 General Market Outlook

3.7.1 Overview

The Tablelands has been relatively fortunate during the Covid-19 pandemic, due to a significant proportion of traditional markets being residents from the nearby coastal strip and Townsville regions.

As to the future and wider, or new markets, the impacts of Covid-19 will extend for an uncertain length of time. Domestically, State / Territory borders are progressively opening, unless there is a surge of cases. The impact of this is on long haul drive market visitors mainly with caravans, campervans or motorhomes.

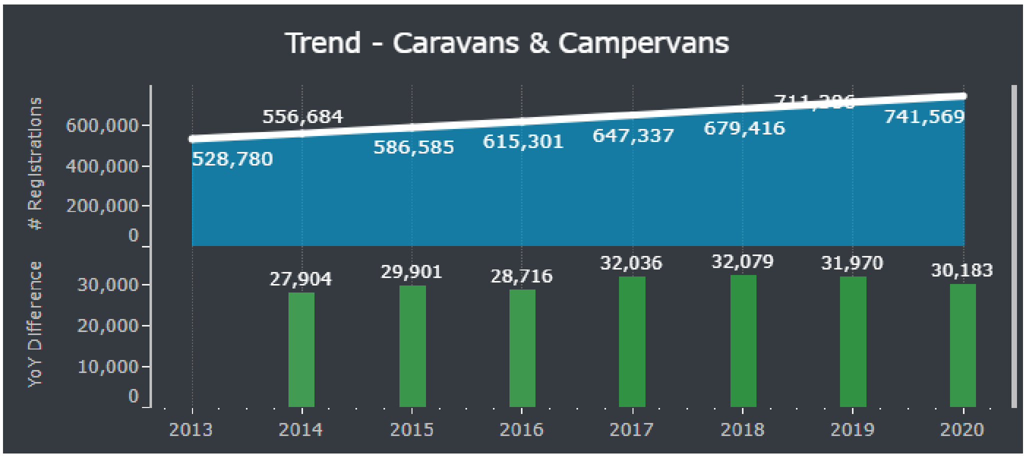
International travel to Australia in the short to medium term depends on possible ‘travel bubbles’, when or if an effective vaccine is found and the time taken to distribute it. Inbound international travellers traditionally impact the Tablelands mainly through day visits in hire cars. Some do visit as part of small tour groups. Numbers are probably small compared to other source markets due to low levels of arrival awareness.

For outbound international travel, impacts remain to be seen. The extent to which Australians will have confidence to revert to choosing overseas holidays over domestic is hard to predict. It will of course depend on global events but could impact Tablelands visitor numbers adversely.

However, at least in the short term, Covid-19 impacts on domestic travel are already apparent. Pent up demand is producing increases in domestic travel numbers.

3.7.2 Caravans & Camping

Caravan and camping trips have long been popular in Australia. There were upward trends, even before the pent-up demand flowing from Covid-19 restrictions. The Caravan Industry Association of Australia has posted the following trend graph of caravan and campervan registrations:



(caravanstats.com.au/motor-vehicle-census)

The same organisation released a State of the Industry Report in September 2020, which reported:

> *In 2019, the total caravan and camping visitor nights exceeded 60 million and 14 million trips for the first time. When you reflect that there are 24.8 million Australians and 8.4 million households, caravan and camping holidays has become an integral part of our national travelling behaviour.*

The resurgence in this type of travel as Covid-19 associated restrictions are lifted is already apparent on popular drive routes. An indicator is that powered site occupancy nationally increased 109% in the week – 25 May to 1 June 2020. (caravanindustry.com.au/caravan-and-camping-resurgence-reflected-in-occupancy-figures).

Further indications of future demand came from June 2020 research, which found that 19 million Australians would consider staying in a caravan park.

3.7.3 SUV's

Sports Utility Vehicle (SUV) sales have seen a long-term trend as a rising share of all vehicles sold in Australia.

Official sales figures for July 2020 (Federal Chamber of Automotive Industries) show SUVs – which includes soft-roaders, off-roaders, and 'faux-wheel-drives' – represented 50.4 per cent of the total mix of new vehicles sold.

SUV sales overtook those of regular passenger cars for the first time in 2017 – when they represented 39.2 per cent of vehicles sold versus 37.8 per cent for passenger cars. However, this is the first time SUVs have accounted for more than half of the entire market in a given month.

There are several reasons for this trend, quite apart from any ambitions to explore Australia. Many will not stray from urban streets. Nevertheless, the trend further supports caravan and camping trends. The possibility is that when a family has the capability to explore country roads and off-road experiences, the temptation will be stronger. Small families do not necessarily need a campervan to camp at popular places like Lake Tinaroo. They may need only an SUV plus a boat or jet ski.

3.7.4 Boutique Accommodation

High quality Bed and Breakfast style properties on the Tablelands have built individual reputations and their own niche markets. These appear to attract high occupancy levels, especially for short breaks over long weekends. Some have a profile in international markets as quality wilderness retreats.

A recent trend has seen the growth of Airbnb and their imitators, associated with a move away from hotel and resort accommodation to holiday home rentals. Airbnb alone lists 177 properties available on the Atherton Tablelands, with other sites adding significantly to this number.

This trend is positive for facilitating more overnight and extended stays but represents very small numbers as a proportion of visitors. It may dilute the market for the few high-end properties offering the more traditional full service. However, since their clientele tend to be those seeking a romantic getaway and / or some 'pampering', their market may not be impacted significantly.

The trend to independent holiday house rental does detract from a business case supporting new hotel style accommodation.

3.7.5 Likely Impacts

Predicting the future in the face of uncertainties is not wise. Current trends and circumstances can change at any time. Covid-19 is a classic example.

However, current trends and circumstances are all that are available and can point to likely future scenarios, provided there are no future major disruptors.

Before Covid-19, the general expectation was some 900,000 international and 1.2 million domestic visitors to 'Tropical North Queensland' each year – subject to variations over time. It seems pointless to attempt a detailed assessment of the likely future, due to the many variables and unknowns. Some reasonable general expectations are:

- International visitor numbers may take years to recover, subject to the impacts of any 'travel bubbles' negotiated.
- The surge in domestic holiday demand will probably weaken as international travel slowly becomes possible and considered safe enough.
- Pent up demand for overseas holidays could be strong enough to have a major impact on domestic demand. However, this could be offset by a surge in demand from international travellers, in part supported by Australia's record in fighting the virus.
- Even after the pandemic itself slows, financial impacts on nations and businesses may adversely affect peoples' ability and preparedness to travel.

The implication is that the Tablelands has a need to monitor ongoing market developments even more closely than previously.

3.8 Products & Experiences

As previously indicated, natural beauty, pristine nature, diversity and variety of farm produce are the foundations for Tablelands tourism. At the same time, there is limited yield due to the limited amount of experiences for which visitors pay and the predominance of day visitors. While there is a diversity of farm produce, there also seems to be an issue in sustaining enough restaurants and cafes delivering the food experiences visitors seek (and at the times they want it). Some food experiences are achieved through roadside farm stalls, packaged product, specialist tour operators and on farm experiences / outlets.

Food trails are at various stages of development. There are several packaged tours that visit (but not necessarily based on the Tablelands) and a small number of paid attractions, such as the Lake Barrine boat tour, Herberton Historic Village, Herberton Steam Train and smaller museums.

The scale of the Tablelands leads to significant distances between locations of interest. Additional products would assist in providing added depth and interest to visitor trails, as well as increase yield. There are many perceived opportunities for additional product, with concepts including:

History
- Evening cemetery tours
- Steam train experiences
- World War II
- Mining and miners' stories
- Pioneers' stories

Agriculture
- Farm tours
- Farm stays

Soft Adventure
- Guided overnight hiking
- Rafting on Tinaroo releases
- Zip Lines
- Mountain bike-based endurance tours
- Jet ski hire
- Packaging / combinations of experiences
- Authentic Aboriginal experiences

The Herberton Steam train is nearing completion of a feasibility study to extend the trip to convert it into a more significant experience and at least one Aboriginal group is interested in development of guided cultural rainforest experiences. It is not certain that either will lead to more commercial product at this stage. Herberton has occasionally successfully run evening historic cemetery tours. These have been sporadically organised and run by volunteers. They have been more in the nature of an event that a regular tourism offering.

The main point is that opportunities appear to be there, but for them to lead to more product offerings, there need to be people motivated to establish a commercial, professional tourism operation. For this, there needs to be an evidence-based case that indicates a strong likelihood of viability.

3.9 Competitive Positioning

Tourism is a highly competitive industry, with fierce competition to attract visitors between regions, States and nations. Billions of dollars are spent on marketing globally. It is clearly difficult to stand out to attract attention and can be very expensive to compete against large marketing budgets.

For a region, the task is to closely match offerings to target market needs, preferences and aspirations for their holiday experiences. At the same time, it must demonstrate why their region is better or different than competitors.

The level of difficulty in this positioning increases in parallel with the broadness and size of the target market. For the Tablelands, it has an established generic position and reputation with residents of the coastal strip to Townsville, with the major advantage of easy access. Ongoing marketing of existing experiences to this target would hope to further increase awareness and produce organic growth. As noted elsewhere, these visitors are the greatest source for generation of repeat visits, which is already a tradition. The Tablelands cannot afford to lose its positioning in this area. There will always be competitive forces that need to be countered, as well as the opportunity to grow the market with comparatively modest marketing, compared to other market opportunities.

Raising awareness in larger generic markets, such as international travellers, Sydney and Melbourne residents is hugely more difficult, due to competitive marketing and costs. There are many regions that base their positioning on experiences of nature, wildlife and beauty. While the Tablelands has natural assets and attributes that are first class, it is a matter of breaking through the competing messages to gain attention.

In recognition of these factors, the most viable competitive positioning strategy for market growth is likely to involve **focus**. That is, to focus on highly differentiating features of the region (existing or possible) and focus on well-defined market segments best matching the differentiating features. This is already done to some extent, by some businesses in the region, but is not a regional strategy.

This is not to say that marketing of the diversity of the region with tags such as *the food, nature and adventure trail* should be wound back. Competition for existing markets is only likely to increase. The word '*trail*' used in this tag line provides a basis for tying together strategic direction, suggested later.

4 Key Issues, Challenges & Opportunities

The attached SWOT Analysis identifies a range of issues, challenges and opportunities. From this and the previous sections, the following have been identified as a consolidation of the **key** strategic level matters most impacting outcomes for the TRC tourism industry.

Relevant Section	Description
3.2.1 3.5 3.6.1 3.7.4	Primary traditional source market is coastal strip citizens • Provides source for repeat visitors • Mostly low yield from day trippers and camping • Major source of short break visitors, who can be high yield
3.1 3.2.3 3.6.1 3.7.2 3.7.3 37.5	Traditional markets include long haul visitors in motor homes or towing caravans or campervans • Sales trends for these vehicles indicate an ongoing strong market sector • It is a market sector that can be targeted through focused marketing – (consumer shows and established drive routes) • While commonly thought of as a 'grey nomad' sector, it is increasingly diverse
3.2.1 3.4.4 3.7.4 3.9	High level of difficulty and costs in accessing new market sectors • Lack of pre-departure marketing in major potential markets orients visitation to day visitors
3.2.3 3.5 3.6.1	Weaknesses in market intelligence for existing markets • Market preferences, needs and aspirations can change over time • Market demographics may change over time (age ranges, group composition, income levels etc.) • There may be missed opportunities to provide products and services
3.2.1 3.4.1 3.4.2 3.4.4 3.9	The diversity of assets and experiences is both a strength and a weakness • Many other destinations rely on scenic assets and food as key selling propositions • The Tablelands has not settled on one icon to promote • There are is a lack of consistency in messages, styles and words being used in marketing the Tablelands, potentially diluting impacts and effectiveness
3.3.1 3.7.4	Limited accommodation stock • Number of beds available • Number of properties below contemporary expectations and standards • The only larger scale property configuration is self-contained units – no general resort style property • Provides no access to industry national and international marketing and distribution systems (apart from caravan park chains).
2.3 3.2.2 3.4.1 to 3.4.4 3.6.5 3.8	Limited human and financial resources available • Heavy reliance on volunteers • Scarce professional tourism industry skills • No career paths for young people • Marketing funding is inadequate to mount effective ongoing campaigns to boost awareness and effectively target new defined target segments •

Relevant Section	Description
2.3 3.2.2 3.4.4	Small scale of most businesses • Associated with ageing population implies issues in succession and risk of business closure • Limits ability to manage rather than operate in the business • Increases risk of burnout • Some are lifestyle businesses – not necessarily with professional tourism industry knowledge or expertise • Many small marketing budgets – many voices which may produce market confusion and poor penetration
3.4.2 3.4.5 3.6.2 3.6.3 3.6.5	Significant growth of interest in active outdoor sport and leisure activities • Provides opportunities for focus on well-defined, specialist markets • High profile events attract coverage and regional profiling free to the region
3.1 3.2.3 3.4.5 3.8	Many local road loops, existing trails and opportunities for more • Increases potential to retain visitors for longer • Meshes with market opportunities in outdoor leisure and sports
2.3 3.3.1 3.8	Commercial product limited and mostly long established • Points to need for product refresh and new product to retain / increase existing market yield • Additional product would strengthen local trail loops and enrich / intensify visitor experiences • New product likely to increase overall visitor yield
3.4.1 3.4.2 3.4.3 3.4.4 3.4.6 3.4.7 3.7.4	Elements of the industry tend to operate in silos • Businesses feel alone and there is lack of support • Status of TRC tourism related strategies and industry implications not widely known outside of Council • VICs tend to focus on their small sub-region • Limited connection between TRC and LTO • Some stakeholders regard Cairns and other adjacent regions as the enemy rather than sources of collaboration and visitors

5 STRATEGIES

5.1 Strategic Context & Intent

It needs to be remembered that the Tablelands tourism industry is not new and the situation analysis points to flat outcomes over recent years. The priorities are therefore to work on weaknesses, find a way to grasp opportunities and address both internal and external issues.

The intention for this Plan is for it to 'sit above' the many current, existing strategies and initiatives relevant to tourism industry development in the region. These will continue to proceed according to their individual strategic frameworks. A distinguishing feature of the region is that strategies and reviews relating to tourism development are a well-trodden path over many years. Issues and opportunities are by and large long standing and existing strategies are well aware of them.

In this context, this Plan can best contribute by providing the connecting themes that assist in drawing existing strategies together in a cohesive effort that improves outcomes for the regional tourism industry and the regional economy.

The approach adopted is to limit strategies to a few considered the most strategic, practical and achievable, together with having the most overall potential to enhance existing strategies and build cohesive, aligned effort. A long list could be developed but is more likely to dilute effort and create further confusion with existing strategies.

For the future, the SWOT analysis includes a comprehensive list of 'Possible Responses' to each Strength, Weakness, Opportunity and Threat. As implementation of the overarching strategies below progresses, it is recommended that the SWOT be re-visited to build further initiatives achievable and appropriate to the circumstances then applying.

5.2 Choose Focus, Align Resources

5.2.1 Description

This strategy involves choosing a well-defined, growing market based on interest and shifting the focus of effort and resources behind building new markets from broad to narrow. The logical interest group to choose is cycling, with benefits flowing to attraction of hikers.

5.2.2 Rationale

The Tablelands are included in several drive routes. However, this is about development of local routes. It would combine local road loops, existing and new trails, into specifically designed multi-experience products involving circuits and loops that integrate with attractions, products and points of high interest.

Many regions globally are developing mountain bike and cycling tracks. The Tablelands can utilise the diversity often spoken of as a competitive, differentiating advantage through this strategy, as it would be offering more than a track or road to ride or walk on.

An associated competitive advantage is that where competitions are involved, the region has much to offer for accompanying family and friends, apart from watching the event.

The strategy at least in part addresses the issue of scarce resources. A focus emphasis brings resources available to bear on a narrower, more well-defined market that can be targeted through its special interest channels, rather than broad marketing channels.

It should also be able to align disparate interests which traditionally on the Tablelands have had problems in collaborating. Townships, operators and businesses will all have a vested interested in being a part of the circuits and in contributing to their promotion.

It can leverage off wider current regional strategies and initiatives, as well as assist in coordinating and energising effort in implementing relevant TRC strategies.

Cycling, with hiking as a supplementary market, not only utilises existing regional attributes, but also engages two of the fastest growing special interest markets globally.

5.3 Engage with Wet Tropics Management Authority

5.3.1 Description

This is a support strategy to 5.2 – Choose Focus, Align Resources. The strategy involves developing collaborative processes and initiatives between TRC and the WTMA Tourism Plan. It would seek to inspire WTMA to engage in the *Choose Focus, Align Resources* strategy and align aspects of implementation of its Tourism Plan with TRC based initiatives.

5.3.2 Rationale

The Wet Tropics areas within the Tablelands region already include tracks and trails through iconic areas. Engagement in the development of the circuits and loops envisaged under 5.2 should add value to their Tourism Plan and enhance the regional economic benefits envisioned.

5.4 Facilitate New Product Development

5.4.1 Description

'Facilitate' is the emphasis in this strategy. It is aimed at an acknowledged long-standing weakness and barrier to increased yield. It involves building motivation and interest in investigating and establishing new commercial tourism experiences.

An element of the strategy would involve making presentations to Chambers of Commerce and like organisations on the local tourism industry, status, developments, challenges and contribution to the economy and community.

Ideas for additional products are included in the attached SWOT Analysis, under Weaknesses (page 42), as a basis for discussion.

5.4.2 Rationale

New products will be developed only if people recognise an opportunity for something they see as rewarding and if they have access to the skills and resources needed to develop them. There is some interest and activity in this at present (Herberton Historic Train and Aboriginal groups). However, raising awareness of the tourism industry, current strategies, initiatives and product opportunities will increase the likelihood of the opportunities being explored and taken up if viable.

Beyond raising awareness, connection of interested parties with sources of information and support would further facilitate developments. Support could include facilitation through Council processes and business mentoring.

This strategy also meshes with 5.2. The design of circuits and loops is likely to include identification of new product opportunities. These same circuits and loops should increase the likelihood of the success of products and experiences linked to them.

5.5 Facilitate Connection, Cooperation & Collaboration

5.5.1 Description

This strategy involves building dialogue and connection between disparate stakeholders involved in the Tablelands region tourism industry and community groups. It bypasses the often difficult task of generating collaboration at formal organisational levels by adopting the technique of 'taskforces' and 'focus groups' with specific, well defined goals to achieve. They disband after achieving their goals. Members selected for each will have an interest in achievement of the goals set.

5.5.2 Rationale

This strategy addresses a weakness observed in reports over a period of years (some being referred to in this report). That is a tendency for there to be a lack of cohesion, free flows of two-way information and collaborative frameworks across stakeholder groups. This is not uncommon in regional Australia. However, where connections across industry components are weak, the outcome is frequently fragmentation, wasted scarce resources and less than optimal industry outcomes for their region. Collaboration and information exchanges between what are often seen as very different industry elements may prove the most productive in generating new ideas.

Another aspect is that TRC has a set of strategies being implemented through staff, who seem to be collaborating, but there is some doubt as to the level of awareness external stakeholders have of their status.

5.6 Build More Comprehensive Market Intelligence

5.6.1 Description

Comprehensive and accurate market intelligence is always a critical success factor for the tourism industry. This strategy is to update and improve market intelligence for the Tablelands region tourism industry, especially on traditional markets.

5.6.2 Rationale

There are weaknesses and gaps in market intelligence currently available. Further, traditional markets inevitably evolve and change in their needs, expectations, requirements and even their composition. At the same time, competition for attention of those traditional markets is likely to increase.

5.7 Improve Access to Council & Processes

5.7.1 Description

The role of the Economic Development Officer includes being a conduit between business and industry with Council. This can provide a point of access for tourism business and investors for information, advice and support relating to relevant Council processes, strategies and initiatives.

There is a general newsletter circulated to business providing wide ranging information. However, the perception gained from the targeted interviews was that tourism industry business at least are not well aware of the availability of this conduit. In these circumstances, it would be worth pursuing strategies to increase industry awareness.

5.7.2 Rationale

Business and small business especially often find it difficult to understand Local Government processes and find it difficult to navigate through such organisations with their enquiries. This can add costs, slow business development and sometimes lead to adversarial attitudes.

The aim would be to steadily facilitate a more collaborative and transparent relationship. This could support more business development and investment attraction for the Tablelands region.

5.8 Facilitate Increased Businesses Support

5.8.1 Description

This strategy meshes with 5.7. Subject to available resources, increased general support for tourism businesses could be provided through the Economic Development Officer role. This would be by way of referral to programs and resources available outside of the TRC itself. For instance, the Queensland Department of State Development, Tourism and Innovation has a *Mentoring for Growth* Program which connects small businesses with professional mentors they could not otherwise afford. There are tools which assist business to build modern and effective websites. Websites that include the ability to book and pay may be useful. Support in development of these would be useful. It is acknowledged that this already happens to some degree but deserves highlighting as a strategy.

Some programs (State and Commonwealth) require writing significant applications (including funding applications). Very small businesses do not have the time or expertise to complete these. Support at some level could be considered through TRC, consistent with policy and equity. There would need to be guidelines to protect TRC and limit assistance to those cases considered to contribute to the overall development of tourism in the Tablelands region. It is appreciated it would be difficult for TRC to strike the right balance. The alternatives are general support through the Economic Development Officer and discussion with Tablelands Futures Corporation to develop collaboration in this area.

This approach also contributes to a collaborative culture between TRC and industry.

Increasing opportunities for industry peers to exchange information, share issues and experiences is an effective and cost-effective way to increase industry cohesion and build on its strengths. Under this strategy the LTO, in collaboration with TRC, would schedule more industry ‘networking’ events. Timing would be guided by industry views. General networking events tend to be of limited value. A different approach is required. The approach recommended is that these gatherings would present specific issues and ideas for informal discussion at each. These may be chosen from issues and ideas submitted beforehand by businesses. If supported by both Council and the LTO, it should enhance the ability to attract non-members of the LTO. This both widens the audience and provides an opportunity for the LTO to recruit members and so increase its organisational strength.

5.8.2 Rationale

The small scale of most tourism businesses and would be businesses contributes to feelings of isolation and limits time for networking and other collaborative activities. The need is for owner managers to have or have access to professional tourism industry expertise and up to date intelligence, general management, financial and marketing skills. Added time pressures especially during peak demand further limit ability to manage and grow the business. In the case of the Tablelands, succession or exit planning presents issues, which may be detrimental to the industry as a whole over time.

All small businesses are stronger where they have access to good and trusted mentors, collectively contributing to industry strength and potential for growth. Often the best mentors are industry peers, who have learned from direct experience.

5.9 Facilitate & Attract Accommodation Investment

5.9.1 Description

This is a longer-term strategy. A first step involves establishing the level of interest and the conditions under which investment is most likely to be generated. The second is to monitor and where possible facilitate development of those conditions. Once monitoring indicates conditions are favourable, a business case would be called for, then pitched directly to those stakeholders that research indicates would be most interested.

5.9.2 Rationale

Various reports over some 15 years have identified the accommodation mix, standards and bed numbers available on the Tablelands to be a limitation on tourism industry development. This goes beyond directly limiting the number of overnight visitors, with consequent impact on yield. A hotel chain property would have access to the chain's national and international marketing, distribution and booking systems. The predominantly small-scale operators do not have this. The exception on the Tablelands are caravan parks which are part of national chains.

The strategy recognises that market conditions will drive investment interest, and these involve influences and drivers well beyond the Tablelands region. The most logical first place to look for investment is in the local region and with current accommodation owners. There is financial capacity in the local economy. These local investors' level of interest, in common with larger 'external' investors will be driven by the strength of the business case. Generic 'investment attraction' documents have a poor record in investment attraction. Specific cases pitched to specific interested parties achieve outcomes. This could be a consortium of local investors, partnered with a national chain.

6 Action Plan

Strategy	Key Implementation Actions	Partners	Priority
Choose Focus, Align Resources	• Develop key success criteria for circuits and loops • Consolidate actions and recommendations from all existing strategies which could contribute to circuit and loop development • Scope out likely geographic coverage for several circuits and loops as a preliminary exercise • Form cross-sectoral working parties to develop preliminary design concepts (Council, WTMA, cycling, rail trails, townships, accommodation, tours, attractions) • Re-form working parties as necessary to align behind development of each specific circuit / trail • Develop each circuit / trail • Pursue advocacy as and where required to attract support from relevant agencies	TRC, WTMA, local community organisations, Atherton Bike Hire, Northern Bikes, Big4 NRMA Atherton, Chambers of Commerce, TAT, DOT	**1**
Engage with Wet Tropics Management Authority, Parks and Forests	• Exchange copies of the DMP and the WTMA Tourism Plan • Workshop to establish scope of mutual interest • Invite WTMA to participate in design of circuits and loops proposed under 'Choose Focus, Align Resources' • Explore opportunities for cooperation in seeking investment and funding for projects • Develop and implement collaborative projects	TRC, WTMA, Parks and Forests - Dept Environment and Science, Tablelands Futures Corporation	**1**
Facilitate Connection, Cooperation and Collaboration	• Link with first strategy as to working groups for design / development of circuits and trails • Draw from existing strategies subjects on which those implementing could provide briefings on status and / or seek input from industry stakeholders • Establish multi-sector focus groups tasked with addressing a specific issue. Disband and establish others as needed • Feed focus group recommendations into responsible organisations • Provide feedback to focus group members on outcomes	TRC, WTMA, local community organisations, Atherton Bike Hire, Northern Bikes, Big4 NRMA Atherton, Chambers of Commerce, TAT, DOT	**2**

Strategy	Key Implementation Actions	Partners	Priority
Improve Access to Council and Processes	• Review Economic Development Officer role and resources available • Increase focus on tourism industry in the role • Provide training and appropriate resources • Develop increased tourism industry awareness through information circulation, TRC website, tourism industry event and public media • Develop industry feedback mechanisms	TRC	**2**
Connect Businesses with Support	• Supplementary to the above • Canvas tourism industry businesses for current individual business issues faced • Schedule regular tourism industry stakeholder meetings, with current issues listed for informal discussion and exchange of ideas	TRC, TAT, All tourism businesses	**3**
Facilitate New Product Development	• Ongoing briefings and updates on the local tourism industry for Chambers of Commerce and like organisations • Reference possible experiences listed in the SWOT under Weaknesses • Distribute information on the status of ‘circuit and trail’ development and product development opportunities • Engage with the agricultural sector to make connections with trail development to raise awareness of opportunities for on farm and food trail opportunities • Presentation/s to the Cairns Chamber of Commerce on circuits and trails strategy • Consult mountain bike and cycling organisations to identify any likely investors in new product • Brief likely investors identified	TRC, TAT, Local Chambers of Commerce, Tablelands Futures Corporation, Local farm groups, Food	**3**
Build More Comprehensive Market Intelligence	• Develop a brief for market research on Tablelands target markets • Engage with CQU to follow up on their previous work • Assess outcomes of research and impacts on current experiences and offerings • Prepare response recommendations • Engage with tourism industry businesses	TRC, CQU, TAT	**4**

Strategy	Key Implementation Actions	Partners	Priority
Facilitate and Attract Accommodation Investment	• Identify the parties most likely to be interested (local, regional and national) and the most appropriate contacts • Engage with selected parties to establish what the conditions need to be to trigger interest in investment • Monitor investment climate and market conditions for new and / or refurbished accommodation • Support the preparation of business case/s • Pitch to targeted investors • Offer support and / or incentives for investment appropriate to and consistent with TRC polices, planning framework and wider economic development strategies	TRC, Tablelands Futures Corporation	**4**

7 Monitoring the Destination Management Plan

The is an overarching, general strategy document, intended to facilitate better coordination and cohesion across TRC's existing direction and strategies relevant to tourism industry development. The objective is therefore broad, being:

to create a plan to build and manage the region's visitor economy

This is to be through addressing several constraints and weaknesses, listed in Section 2.3. The monitoring of outcomes is aligned with objectives.

Objectives	Measured By
Build the visitor economy generally and increase yield	1. Monitoring Satellite Account statistical trends: a. Number of day visitors b. Number of overnight visitors c. Length of stay d. Average of visitor spending 2. Market research that contributes to better understanding of current and potential markets, their needs and preferences
Increase collaborative effort	1. Number of focus groups / working parties that achieve their objective/s 2. Number of circuits and trails designed and agreed for development 3. Assessment of ongoing working relationship between WTMA and TRC
Increase information flows	1. Activities of Economic Development Officer and Visitor Information Centre staff in engaging with the tourism sector and facilitating connections 2. Number of tourism sector business networking events and industry feedback
Product development	1. Extent of new experiences associated with circuit / trail development that produce new products
Investment in accommodation	1. Business cases facilitated 2. Projects submitted to TRC for consideration

Responsibilities
Effective communication and engagement is the responsibility of TRC staff and key stakeholders including industry representative groups, government and tourism business operators. The effective implementation of this Destination Management Plan requires a commitment to a collaborative approach by all stakeholders.

Strategy Review
This Destination Management Plan is based on the knowledge and information available at the time of adoption and or review. It is intended that the strategies will be refined following initial adoption with improvements made on an ongoing basis under delegation to the Chief Executive Officer and sub-delegation to the Coordinator Communication & Engagement.

Attachment – SWOT Analysis

The following draws from the Situation Review to crystallise the Tablelands region Strengths, Weakness, Opportunities and Threats, identify their implications and options that use them to build consensus for a Destination Management Plan (DMP). This SWOT was included as part of the Discussion Paper circulated in the process of preparing this DMP.

Strengths	Strategic Implications	Possible Responses Available
Visual assets and natural features (Crater lakes, Waterfalls, Wet Tropics)	• Provides foundations for destination appeal, marketing messages, images and differentiation	• Review stakeholders' alignment with current destination messages, positioning and imagery • Engage marketing expertise to review messages, positioning and imagery • Attract travel writers • Famils for inbound travel companies
Diversity of experiences	• Increases number of different visitor interest groups the Destination can seek to attract • Provides foundations to retain visitors longer	• Market research into existing and potential market sectors as to expectations, needs and triggers to visit • Build products and themes • Identify and engage with specialist interests / publications / travel writers
Large geographic area	• Enables dispersal of visitors which: ○ Reduces community and environmental impacts ○ Provides ability to host significant visitor numbers concurrently ○ Maintains quality of visitor experience of natural environment	• Feature lack of crowds in marketing • Build businesses based on visitor volumes • Establish regional policy on volume vs small scale tourism
Interesting, diverse history	• Increases number of different visitor interest groups the Destination can seek to attract • Provides foundations to retain visitors longer	• Build product / experiences based on history (As per 'Opportunities' following)

Strengths	Strategic Implications	Possible Responses Available
Proximity to Cairns and Cairns Airport	• Some 2.3 million visitors (2019), provide a base for market targeting (limited by pre-departure awareness)	• Collaboration with hire car firms • Brochures in Cairns accommodation • Increased collaboration with TTNQ
Wildlife experiences	• Provides a key experience especially international visitors come to Australia for • Provides a key 'hook' for marketing messages	• Marketing emphasis in international marketing
Diverse agricultural production	• Provides basis for building regional food experience reputation • Provides basis for farm visit experiences • Provides basis for boutique food and beverage products • Provides foundation for building distinct 'Tropical Flavours' food experiences • May provide opportunities for 'cross branding' (e.g. King Island)	• Theme in marketing • Build product / experiences based on history (As per Opportunities following)
Location on existing iconic drive routes	• Provides a visitor base without Destination effort • Increases risk of being regarded as a 'stop over' rather than a Destination	• Ensure pre-departure and on-route destination awareness • Collaborative marketing activities to draw more visitor through the Tablelands
Climate	• Well known key attraction for summer visitors from the coastal strip, inland regions and Townsville • Coastal climate attracts visitors from southern states	• Continue to appeal to 'cool summer break' coastal residents
Boutique accommodation	• Adds market sectors to Tablelands offerings – couples, romantic getaways, extended stay internationals • Produces higher yields, including flow ons for other attractions	• Collaborative marketing between operators to increase existing market penetration and access new markets • Develop collaborative marketing to build shoulder and mid-week bookings

Weaknesses	Strategic Implications	Possible Responses Available
Lack of broad domestic market awareness	• Reduces potential to increase visitor numbers • Likely to orient visitors to day trippers through post arrival awareness • Reduces ability to increase yield though longer stays and more diverse market sectors	• Continue focus of traditional markets for organic growth • Market research to identify most promising sectors and how to access them • Acquire additional funds for broad based domestic marketing campaign • Pool marketing funds available for agreed, targeted domestic marketing • Partnerships with RTO and LTO for destination marketing
Lack of international destination awareness	• Reduces potential to increase visitor numbers • Likely to orient visitors to day trippers through post arrival awareness • Reduces ability to increase yield though longer stays and more diverse market sectors	• Seek funds for market research to identify most promising international sectors and how to cost effectively access them • Acquire expertise /funds for targeted marketing • Businesses with high appeal / interest in international markets pool resources for collaborative initiatives
Fragmented / insufficient market intelligence	• Reduces effectiveness of marketing generally • Reduces ability to match experiences with visitor needs and expectations • Reduces ability to build business cases for new businesses and investment attraction • Reduces ability to effectively prioritise resource allocation in marketing and destination development	• Seek funds for definitive market research on current and prospective visitors • Create a platform on which stakeholders enter visitor data on their individual businesses on a regular basis
Limited collaboration between key stakeholders	• Dilutes destination marketing and development, and risks wasting scarce resources • Stakeholder decisions may not be based on all information required • Likely to generate duplication of effort and costs • Reduced opportunities for shared learning • Increases risk of confusing target markets with inconsistent messaging and images	• Create an online forum on which TRC, businesses and agencies can ask questions, post and exchange information • Quarterly meetings / events at rotating businesses • Develop specific collaborative projects and facilitate their implementation

Weaknesses	Strategic Implications	Possible Responses Available
Lack of agreed leadership and role allocation	• Dilutes destination marketing and development, and risks wasting scarce resources • Decisions may not be based on all information required • Likely to generate duplication of effort • Reduced opportunities for shared learning • Increases risk of confusing target markets with inconsistent messaging and images • Likely to increase individual stakeholder costs	• Provide structure, functions, options and rationale in Destination Management Plan
Fragmented and under-resourced marketing	• Not likely to secure new markets • Increases risk of erosion of markets through competition from other regions • Increases risk of confusing target markets with inconsistent messaging and images • Likely to generate duplication of effort • Likely to increase individual stakeholder costs	• Focus on social media platforms, rather than more expensive marketing channels • Facilitate alignment behind LTO messages, imagery and positioning • Seek additional funding for marketing • Review current marketing and facilitate adoption of aligned platform of images, messages and imagery
Insufficient information exchanges	• Likely to generate duplication of effort • Likely to increase individual stakeholder costs • Reduces opportunities for recognising and acting on collaborative opportunities • Increases workload for small, under-resourced businesses • Increases small businesses sense of isolation and feeling of lack of support • Reduces whole of destination understanding, knowledge of other businesses and experiences offered	• Create a position that provides a 'one stop shop' for stakeholders to seek and exchange information • Create an online forum on which TRC, businesses and agencies can ask questions, post and exchange information • Quarterly meetings at rotating business venues during peak season and monthly during low season. Presentation of the business and general networking. • Develop specific collaborative projects and facilitate their implementation
Diversity of experiences available	• Increases difficulty in identifying and presenting consistent messages and images that differentiate the Destination	• Package experiences into themes oriented to specific target markets

Weaknesses	Strategic Implications	Possible Responses Available
	• Limits the ability of day trippers to experience all • May increase competitive behaviour between local businesses	• Conduct a comprehensive branding project, including facilitation of adoption of outcomes • Seek funding for brand marketing collateral • VICs work collaboratively to guide visitors from one location to the next • GPS digital guide • Market destination as overnight experience
Large geographic area	• Limits the ability of day trippers to experience all • Increases difficulties for visitors in planning routes to be followed to match interests	• Develop themed routes • Review adequacy of physical and digital signage • GPS digital guide • Encourage VICs to work collaboratively to guide visitors from one location to the next • Individual businesses provide guidance to visitors on the best routes to suit interests and time available
Ageing population and loss of young people	• Likely to increase the number of business exits over time • Likely to reduce the pool of available labour in a labour-intensive industry • Reduces the skills base available for destination management and development	• Develop regional strategies and actions with a focus on attracting young people and families to settle in preference to older couples • Investment attraction strategies and actions that build / attract larger enterprises that provide career paths, not just jobs
Small scale of many tourism businesses	• Increases the risk of 'burn out' • Individual marketing budgets likely to be small and struggle to be effective • Likely to limit time available to study and research market and trends • Decreases ability to participate in industry networking, information exchanges and educational initiatives • Likely to have limited capital available for business development and refresh	• Create a position that provides a 'one stop shop' for businesses to seek and exchange information • Create an online forum on which TRC, businesses and agencies can ask questions, post and exchange information • Quarterly meetings at rotating business venues during peak season • Recruit / train / incentivise a pool of relief staff available for short term relief work (possibly semi-retired couple/s with tourism industry skills)

<table>
<tr><th>Weaknesses</th><th>Strategic Implications</th><th>Possible Responses Available</th></tr>
<tr><td></td><td>Those small business owners here for the lifestyle may not want to develop their business further</td><td>Develop exchange opportunities with other regions for trained staff/locum work</td></tr>
<tr><td>Insufficient commercial product / experiences available</td><td>Reduces yield from both day and overnight visitors
Reduces destination appeal for groups with diverse interests (e.g. Those accompanying others to support their reason for visit - Mountain bikes etc)
Visitor use of public assets adds costs without contributing to return on investment for the region
Fails to leverage return on natural assets the region is already known for</td><td>Provide business development and implementation support
Scope out / test business cases for new / enhanced tourism experiences based on regional assets, including:
History (e.g. links with Herberton Historic Village)
Evening cemetery tours
Steam train experiences (Puffing Billy Vic)
World War II
Mining and miners’ stories
Pioneers’ stories
Soft adventure e.g.:
Guided overnight hiking
Rafting on Tinaroo releases
Zip Lines
Mountain bike-based endurance tours
Jet ski hire
Packaging / combinations of experiences
Authentic Aboriginal experiences
Agriculture e.g.:
Farm tours
Food trails
Local produce featured in accommodation and hospitality businesses
Position Tablelands as a premium ‘foodie’ destination
Offer packages of experiences to visitors accompanying participants in special events</td></tr>
</table>

Weaknesses	Strategic Implications	Possible Responses Available
Seasonal fluctuations in visitor numbers and low mid-week numbers	• Increases level of difficulty in maintaining business viability • Amplifies the business impact of any reduced visitor numbers during peak months • Decreases ability of businesses to retain stable and skilled workforce • Mid-week numbers tend to indicate high reliance on Cairns region locals	• Research and market to 'Northern Winter escapees' (EU, Russia, etc) in collaboration with TTNQ • Events in shoulder seasons • Continued focus on locals seeking a cool break • Collaborate on special deals in low season
Scale and nature of available accommodation	• Limited number of beds available limits ability to build overnight visitor numbers and yields • Limits ability to cater for larger mixed groups of travellers (MICE) • Reduces ability to attract long haul coach tours	• Market research to identify scope for attracting larger groups • Market research into potential of long-haul coach trips • Develop evidence-based business cases for appropriate accommodation • Identify potential business interests and pitch the opportunities • Support regional advocacy for Kuranda Range Road upgrade
Facility constraints to major event hosting	• Reduces organisers' capacity to plan for and run events • Limits opportunities to increase visitor numbers and yield • Reduces opportunities available to small communities with special attributes • Impacts ability to attract visitors during low seasons	• Council facilitation of collaborative structure for sourcing facilities for hire (e.g. mobile toilets, seating, marquees etc)
Tension around free vs paid RV site usage	• Increases risk of failing to adequately meet expectations of all RV visitors	• Implementation of TRC RV strategy • Increased information flows and engagement with commercial parks

Opportunities	Strategic Implications	Possible Responses Available
Collaborative pre-departure marketing	• Build more effective, competitive marketing campaigns • Deliver consistent messages, images and presentation styles • Build awareness and bookings from markets underrepresented in current visitor profiles • Increase length of stay • Attract higher yield markets • Collectively target specialist / niche sectors matching collaborating businesses offerings	• LTO membership recruitment activities • Development of proposal/s, with rationale • Activities to facilitate participation • Seeking funding through submission setting out rationale and regional benefits • Partnerships with neighbouring Councils, RTO, LTO, WTMA and Queensland Parks and Wildlife Service
Packaging of offerings	• Provide better market penetration, with a larger marketing budget • Better cater for and target special interest groups • Increase length of stay • Increase expenditures during stay • Provides referrals and mutual support for participating businesses	• Develop package proposal/s, with rationale • Activities to facilitate participation • Develop marketing collateral • Harness VIC networks and resources • Capitalise on trip advisor platforms to capture interest at point of booking
Number of loop roads	• Increases ability to offer packages with significant number of different experiences	• Review opportunities in packages and information issued through VICs and destination marketing materials
Partnerships with Cassowary Coast and neighbouring regions	• Leverage combined marketing power and appeal of regions offering similar / compatible experiences and target markets	• Meeting between LTOs, Councils to scope opportunities • Build and implement collaborative initiatives
Expand quality farm and food experiences	• Increase visitor spend • Likely to increase Destination appeal (quality food experiences are an integral part of any holiday) • Likely to contribute to word of mouth advertising • May assist in differentiating the Destination (e.g. King Island)	• Experiences currently available • Gap analysis compared to market intelligence • Develop business cases • Scope potential entrants • Encourage and support developments
Historic interpretive experiences	• Builds on regional assets • Increase visitor spend	• Scope out concepts based on market intelligence

Opportunities	Strategic Implications	Possible Responses Available
	• Motivate longer stays • Provide more local business opportunities • May assist in differentiating the Destination	• Facilitate discussion with existing / interested stakeholders • Support business development and implementation
Authentic Aboriginal cultural experiences	• Increase visitor spend • Motivate longer stays • Provide more local business opportunities • Provide sought after experiences, especially by international visitors	• Market research to confirm size, nature and expectations of potential markets • Engage in dialogue with Traditional Owners (TOs) • Facilitate engagement between TOs and Parks and Wildlife Service • Provide business development and implementation support for Aboriginal groups with business aspirations
Increases in number of return visitors to TNQ	• Increases opportunity to attract overnight visitors • Increase spend and numbers	• Market research to better identify these visitors • Pre-departure marketing targeted at likely return visitor segments • Instagram-able opportunities to grow word-of-mouth recommendations
Covid-19 recovery responses	• Governments increased desire to support tourism industry recovery	• Identify key destination development initiatives with most impact on jobs and business viability • Prepare well-founded submissions for government support to implement identified initiatives
Larger scale accommodation pitched at identified target markets	• Increase spend and numbers • May be constrained by Kuranda Range Road considerations • Needs investor confidence	• Market research into size and nature of potential market • Build business cases / investment attraction initiatives • Support businesses seeking to attract this market
Sporting / cultural events and occasions	• Increases opportunity to attract overnight visitors • Increase spend and numbers • Increases local business opportunities • Widens potential target markets • Builds shoulder season visitors	• Continue engagement with existing and aspirational event organisers to determine needs and barriers • Engage with aspirational and community organisers to undertake research and prepare business plans

Opportunities	Strategic Implications	Possible Responses Available
Long haul coach tours	• Increase underrepresented market sector • Increased spend and flow on benefits	• Market research into size and nature of potential market • Support businesses seeking to attract this market
Build low season visitation	• Increase tourism business viability • Stabilise employment, retain skills and reduce training needs • Support business cases for investment	• Research and market to 'Northern Winter escapees' (EU, Russia, etc) in collaboration with TTNQ • Market and packaging for domestic visitation during Victoria and New South Wales winter escapees • Events in shoulder seasons • Continued focus on locals seeking a cool break
Increasing number of private holiday rental properties (Airbnb and similar)	• Increase number of overnight visitors • Engage the Destination with an increasingly popular accommodation option • Provide income for private property owners	• Engagement with Airbnb to participate in the industry • Collaborative marketing of Tablelands experiences

Threats	Strategic Implications	Possible Responses Available
Other destinations based on natural beauty, nature, wildlife and food experiences	• Increases difficulty in attracting target market attention and motivating visits • Reduces scope of target markets to those in which there is competitive advantage • Increasing numbers of well-marketed destinations and consumer options likely to erode potential to build, or even maintain market share	• Identify key differentiators and develop branding suitable for target markets • Present consistent, unified messaging and images to target markets • Market research into what motivates target markets • Investigate opportunities for collaboration with other like regions – multi destination travel
Pre-departure commitment of visitors to TNQ 'icons'	• Reduces scope of market effectively available • Reduces ability to build overnight stays and increase yields • Increase destination reliance on day trippers • Reinforces emphasis on longer haul self-drive market sectors	• Build destination profile and awareness pre-departure in target markets • Identify and target market sectors who do, or have ability to stay longer in the region • Seek piggyback marketing opportunities from large operators e.g. balloon companies
Competition between regions for investment and people with appropriate skills	• Decreases viability of the destination tourism industry over time • Likely to see tourism business exits over time	• Build digital capabilities to facilitate working remotely • Develop robust business cases for specific industry development projects • Clearly identify differentiating features of the region of relevance to potential investment
Increasing popularity of private holiday rentals (Airbnb and similar)	• Increases competition for Bed and Breakfast and other small boutique accommodation • Do not contribute to Destination marketing budget	• Engagement with Airbnb to participate in the industry • Collaborative marketing of Tablelands experiences
Poor mobile phone and internet coverage	• Decreases visitor satisfaction • Decreases ability to navigate a large region and access post arrival destination information	• Research and articulate the impacts on the region • Advocate for better coverage
High value of Australian dollar	• Likely to increase numbers of Australians taking their holiday overseas • Likely to decrease numbers of international visitors • Reduces potential visitor market	• Focus on differentiation / advantages of the destination • Develop specialist / niche markets • Maintain / build on locals' market

Threats	Strategic Implications	Possible Responses Available
Cheap international flights	• Likely to increase numbers of Australians taking their holiday overseas • Likely to increase numbers of international visitors	• Increase focus on key international markets • Focus on differentiation / advantages of the Destination
Events impacting travel (Pandemics, economic recession, fuel prices, airline decisions, etc)	• Increases overall tourism industry business risk • Exposes tourism reliant regions to economic downturn and job losses	• Maintain / develop both domestic and international markets • Where possible, diversify target markets • Develop specialist / niche markets • Maintain / build on locals' market
Downturns in drive traffic to Savannah Way and Cape York	• Reduces major drive visitor source markets • Reduces viability of commercial caravan and camping facilities • Reduces visitor peak season spend in the region	• Develop collaborative partnership with Savannah Way and Cape York
Failure to provide electric vehicle charging stations in coming years	• Qld Government 'Electric Superhighway' strategy encompasses Brisbane-Cairns and Brisbane-Toowoomba only • Likely to reduce day visitor numbers • May divert numbers of long-haul visitors • Reduces appeal of the Destination to regional extended stay markets (Townsville & region)	• Develop a strategy for EV charging stations – (public and private) • Engage with Qld government to include the Tablelands in the 'Electric Superhighway' • Establish discounted EV charging stations sited at key tourism attractions

Live, discover and invest in a Tablelands community

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