



Central West Queensland Tourism Futures

White Paper

21 August 2018

Document control

Report details:	
Title:	Central West Queensland Tourism Futures White Paper
Author(s):	Bronwyn Voyce
Reviewer:	Amanda Day
Status:	Draft
Release by:	Neil Glentworth
Client:	RAPAD
Client contact:	David Arnold
Synopsis:	This white paper identifies opportunities for tourism industry develop and economic growth in the Central West Queensland region.
Disclaimer:	In preparing this report we have relied on information and material supplied by you, the client, and do not take responsibility for the accuracy of the information and material provided to us.

Revision details	Date of issue	Version number
Initial version	13 August 2018	1.0
Updated with desktop review feedback	21 August 2018	1.1
Client release	21 August 2018	1.1
Revision	07 September 2018	1.3

TABLE OF CONTENTS

1	INTRODUCTION	1
1.1	About the region	1
1.2	Tourism potential	1
1.3	Tourism Futures Forum	1
2	THE CURRENT STATE	2
2.1	Industry performance.....	2
2.2	The case for change.....	2
2.3	Industry opportunities.....	3
3	THE FUTURE STATE.....	5
3.1	A new vision for the region	5
3.2	Recommendations.....	5
4	SUMMARY	7
	APPENDIX 1 BRIGHT IDEAS.....	8

1 INTRODUCTION

1.1 About the region

The Outback Queensland region stretches across the western two thirds of Queensland, spanning from Mt Isa in the north, to the New South Wales border in the south. It epitomises the quintessential Australian experience of wide open spaces and natural untouched beauty. As a tourism destination, the region is host to an array of cultural heritage and natural experiences as well as historically significant and unique sites.

The Central Western Queensland (CWQ) region lies at the centre of the outback region and has one of the most dispersed populations in Australia. Spanning an area of more than 320,000 km², it includes seven local government areas and is home to just under 10,500 people (ABS & Qld Treasury).

Agriculture has long-been the base industry driving economic growth and employment in the region however, the past six years of drought have resulted in severe economic hardship for both landholders and townspeople alike. Whilst these uncertain times have been difficult, they have resulted in a more concerted effort by community leaders, industry and government to broaden the economic base and diversify local economies in an effort to retain talent, maintain employment, enable community resilience and drive new economic growth.

The Pathfinder Report, commissioned by RAPAD in 2017, highlights a variety of opportunities to help achieve these goals, including tapping into potential tourism growth.

1.2 Tourism potential

The Pathfinder Report estimates that tourism growth of 262% can be achieved by 2031, across Outback Queensland (based on 2016 PwC Geospatial Economic Model data). It also predicts that an increase in the value of overnight visitors will see future growth resulting in a \$1.67 billion industry across Outback Queensland over the projected period. This presents a remarkable opportunity for CWQ, a region that represents more than one third of the greater Outback Queensland region and, as a result, community leaders seek to ensure the region is proactive and well-placed to capitalise on this market opportunity.

1.3 Tourism Futures Forum

In early August 2018, RAPAD hosted the Tourism Futures Forum, a full day workshop which brought together key stakeholders from the seven councils, state government and industry. The forum was facilitated by GWI and designed to produce a set of ideas and actions to boost the CWQ region's focus on collaborative tourism development and position the region as a globally significant tourism destination. GWI collated and interpreted the outcomes of the forum, along with key documents, to inform the development of this White Paper.

At the forum, it was well recognised that whilst the region is home to significant tourism assets, there is an opportunity to further develop products and packages that appeal to a variety of markets. Amongst the challenges identified, connectivity and, affordable and reliable transport access were highly rated as barriers to industry development, along with access to regional specific data. At the forum, it was noted that whilst there were a variety of localised strategies, investments and initiatives to develop tourism in CWQ – the region required a more cohesive approach to a single vision and narrative to maximise resources and realise potential.

2 THE CURRENT STATE

This section of the White Paper describes the current state of tourism at a high level, in the CWQ region.



2.1 Industry performance

In 2017, the Outback Queensland region (including South, North and Central West Queensland) had **878,000 domestic visitors** which amounted to **3,906,000 nights** (three-year average, year ending December 2017). In addition to this, there were **21,000 international visitors** amounting to **481,000 nights**. This represented a three-year record high in domestic visitation **growth of 9.7%**, outpacing the state's 3.4% growth over the same period.

Visitor expenditure was also significantly up, resulting in the **value of tourism**, in the Outback region, to grow to around **\$602 million** per annum. Importantly, tourism demand is predominantly driven by the **domestic market**, with **76.5%** of overnight visitors came from within **Queensland** and **21.1%** travelling from **interstate** (TEQ, 2017)

Due to the lack of detail data, it is unclear what the correlation link is between visitor numbers and actual spend at a micro level. This is highly relevant as detailed tourism data would highlight the target demographic allowing for improved allocation of investment in growth areas. The ability to match data against domestic high value travellers¹ would be compelling for the region.

2017 data also shows that **international visitation** was down by 10.5% from 2014. International visitors currently only account for **2.4%** of overall overnight stays in the region. There is strong evidence to suggest that international tourists spend more and stay longer² and therefore this is a worrying downward trend.

The trend of increased domestic visitation in the Outback region demonstrates the market opportunity to further develop the industry and, with international visitor trends comparatively on the rise across the state and nationally, it highlights a missed opportunity in attracting international visitors to the Outback.



2.2 The case for change

Over the past decade, CWQ has experienced economic challenges as a result of the ongoing drought and flow-on effects. Whilst there has been significant effort to support the agriculture industry and grow the tourism sector, it is widely recognised that more needs to be done.

The following drivers highlight the case for a renewed approach to diversifying the economic base by further developing the tourism industry:

Digital disruption and consumer change: All parts of the economy are seeing the impact from changes in technology and a flow on of consumer demand. With the string focus on

¹ <https://cdn2-teq.queensland.com/~media/e3772d1ceaff47a4ab8503d777cd540b.ashx?vs=1&d=20180606T134825>

² <https://teq.queensland.com/research-and-insights/international-research/international-market-research/consumer-demand-project>

consumption-based economics (individual need), the region must adapt and embrace to ensure it does not become overlooked.

Economic diversity: Agriculture has historically been the driving economic and employment force for Outback Queensland and, while this industry remains crucial to the future, diversification is required to achieve sustainable growth and economic resilience.

Indirect benefits: A strong and growing tourism industry demands subsidiary services to support visitors and locals alike i.e. accountants, builders, mechanics etc resulting in economic follow-on effects to “non-tourism” businesses. This indirect benefit also presents an opportunity for the region to develop a broader range of employment opportunities (i.e. from traineeships to senior management) which support the region in retaining a variety of skillsets and also enables young people to stay in the region.

Financial and resource constraints: Currently, each local government within the CWQ region has an independent budget process which consistently includes some level of financial and in-kind contribution to the development of the tourism industry. In isolation it is difficult to achieve scale and gain traction. However, as a collective, there is scope to contribute a portion of investment to a regional tourism budget that could potentially achieve greater impact and outcomes for the CWQ region as a whole.

Population decline: Over the past five years the CWQ region has seen a 12% reduction in Estimated Residential Population (ERP) and is now home to just over 10,000 residents (Qld Treasury, 2017). This decline in population severely erodes demand on local services resulting in business closures and an impact on community vibrancy and township vitality.



2.3 Industry opportunities

Authentic brand: The CWQ region is one of Australia’s most remote areas and, as such, boasts wide open spaces which are largely undeveloped or industrialised. This attracts visitors that are seeking an authentic outback experience and an escape from ‘normal life’ to a more laid-back and undisturbed environment. Furthermore, CWQ is well-positioned to leverage the quintessential Australian outback experience with significant potential to provide visitors both with the landscape and experiences that match that perception.

A new narrative: The perception of the bush portrayed in politics, media and in major cities has plagued the Outback with an image of a destitute and undesirable destination as a result of the ongoing drought. While a healthy knowledge of safety in rural areas is warranted, a change in narrative is required to overcome misconceptions about the bush to ensure tourists are not dissuaded from embarking on an Outback adventure.

Vision and leadership: There is a reasonable focus on tourism industry development by local government, the private sector and other organisations however there is a distinct lack of a shared vision and co-ordinated leadership. In order to advance the region, participants at the forum agreed this needs to change.

Industry data: There is a broad recognition by stakeholders across local government and the private sector that a lack of region specific data hinders further development of the industry. It is recognised that improved data presents an enormous opportunity to inform investment decisions, drive marketing effort, improve visitor experience and better enable the region to become more ‘transactable’.

Private sector investment: Ultimately it should be the private sector that drives tourism development and growth in the region. The forum recognised that there are a number of well-developed tourism products in the region that are driving growth and investment in destination marketing. This solid base represents a significant opportunity for the region to build on and attract further investment.

Tourism assets: The CWQ region is home to a number of exceptional tourism assets, including internationally significant cultural and historical sites. There are however a limited array of tourism products and packages and an even more limited understanding of the offering across the wholesale market. Whilst transport connectivity is often cited as a barrier, the region can be accessed by road, rail and air, each of which have the potential to be further developed and leveraged to enable industry growth.

Digital era: Digital connectivity is crucial to reaching and engaging with potential customers in the twenty first century. There is a capacity gap in operators who have the skills and capabilities to seize digital opportunities to attract visitors or offer new experiences. With greater consumer connectivity, digital engagement presents an enormous opportunity reach wider audiences and attract more visitors. It is however noted that in addition to skills and capability, digital infrastructure also requires marked improvements.

Consumer insights: In today's highly connected and competitive era, it is even more important to gain a deeper understanding of your customer and what drives their purchasing (and travel) decisions. The CWQ region would benefit greatly from improved visitor insights accessible through more accurate and reliable data and actually asking visitors what they want. Improved visitor insights will enable resources to be more efficiently allocated, and enable businesses to more effectively develop products, market experiences and measure satisfaction.

Major project co-ordination: State and Federal Governments require solid business cases to consider regionally significant policy and investments. Whilst the region has a number of catalytic projects or policy ideas to drive tourism, there is a distinct lack of process to achieve consensus on the priority of tourism investment. A single point of co-ordination that represents a consolidated representation of the region's priorities along with a plan to achieve greater co-ordination across efforts presents an important opportunity to drive tourism growth in the region.

Government support: The Queensland Government is committed to tourism development in the regions and is supportive of growing the Outback tourism industry. Tourism and Events Queensland invests approximately \$1 million p.a. to the Outback region across event investment, marketing, school camp subsidies and base funding for the Outback Queensland Tourism Association. The Palaszczuk Government's recent announcements of \$10 million Outback Tourism Infrastructure Fund (in addition to the \$36 million Regional Tourism Infrastructure and Experience Development Program) presents a great opportunity for CWQ.

3 THE FUTURE STATE

3.1 A new vision for the region

It was agreed at the Tourism Futures Forum that a priority area of focus should be on improving cross-LGA boundary collaboration. To cement CWQ's vision to be a distinct destination with the Outback - and a globally significant destination - stakeholders from the CWQ region agreed that a unified vision is required. They also agreed that in order for tourism to grow, the region ultimately needs to increase visitor numbers and length of stay by improving its attractions and brand recognition, ensuring access to quality and authentic experiences and enhancing infrastructure and products. It was broadly recognised that data underpinned each of those areas and that with targeted investment and a collective plan, the CWQ region could achieve real economic growth through tourism.

A preliminary vision for tourism development in the region has been devised to guide the future focus of RAPAD, its members and key stakeholders:

The RAPAD region will be a globally recognised authentic outback tourism destination, that offers a range of experiences that exceed visitor's expectations, drive economic and employment growth and enhance regional sustainability.

3.2 Recommendations

The following recommendations have been compiled to guide the region's tourism development activities and achieve the identified potential and growth opportunities. The recommendations share some similarities already identified by the CWQ community and articulated in the Smart Central Western Queensland³. This importantly validates the existing community support for many of these recommendations and mandate to proceed.

1. Develop a Priority Tourism Development Plan

The Priority Tourism Development Plan should reflect a cohesive narrative and vision, developed and adopted by key tourism stakeholders in CWQ region. It should act as a 'masterplan' guiding collective action towards a shared set of goals. The plan should clearly identify the roles and leadership responsibilities of each of the key stakeholder and provide the platform for a new collaborative approach to developing the region's tourism industry.

³ <https://www.rapad.com.au/assets/Uploads/Smart-Central-Western-Queensland-A-digitally-enabled-community-strategic-plan-final-SCREEN-Ver.pdf> (page 10 – 14)

The Priority Tourism Development Plan should be pragmatic in nature and incorporate the following elements:

- **Infrastructure audit**

The infrastructure audit should identify existing tourism enabling assets and their current state/ desired future state. Key stakeholders should agree on the infrastructure priorities that will enable the vision. The audit should enable the CWQ region to prioritise investment into infrastructure projects that are essential to further enabling tourism and economic growth. The infrastructure audit will also identify inhibitors and inform advocacy priorities.

- **Experience audit⁴**

The experience audit should identify existing or new tourism experiences and their current state/ desired future state. Key stakeholders should agree on the hero experiences that should be promoted that will enable the vision. The audit should enable the CWQ region to prioritise investment into policies, programs or infrastructure projects that further enable experiences to be developed. The experience audit will also identify roadblocks and inform policy and investment priorities.

- **Identify external champions**

In order to avoid the occurrence of an ‘echo-chamber’, there is great value in identifying champions who are external to the region but are willing to play the role of trusted advisor or voice of reason. A panel of champions could provide expert input into the development of the Priority Tourism Development Plan, as well as advise on how to implement the plan. The champions could also be promoters of the region, its experiences and offerings, beyond the networks of the region.

- **Data collection and insights analysis⁵**

Data is a crucial resource for developing the tourism industry and inform business and investment decisions. Building on the ‘Outback Mate’ initiative, it is recommended that a digital platform be developed for collecting visitor data and produce real-time insights, inform strategy and enable outback businesses thrive. An ‘Outback Passport’ app, for example, could become the single digital platform links visitors to the region whilst collecting data and generating revenue.

- **Identify and prioritise catalytic/ game-changing projects**

A number of catalytic/ game-changing tourism projects emerge at the forum such as Black’s Palace, the Australian Age of Dinosaurs Museum, a CQW rail experience etc. It is imperative that the region develops a concise list of attractions/ events/ experiences that can be pursued as a collective to ensure efforts are aligned.

⁴ <https://www.rapad.com.au/assets/Uploads/Smart-Central-Western-Queensland-A-digitally-enabled-community-strategic-plan-final-SCREEN-Ver.pdf> 6.3.3 Experiential tourism (page 12)

⁵ <https://www.rapad.com.au/assets/Uploads/Smart-Central-Western-Queensland-A-digitally-enabled-community-strategic-plan-final-SCREEN-Ver.pdf> 6.3.8 Tourism data exchange (page 14).

- **Funding model**

The current investment in tourism development and marketing is largely uncoordinated across the CWQ region. The Priority Tourism Development Plan should be supported by a sustainable funding model that better leverages existing tourism investments and enables new funding sources to emerge. With focused investment by government and industry, CWQ will be better placed to realise their vision for tourism.

2. Develop the brand and marketing strategy

To capitalise on the region's untapped potential and truly become a quintessential tourism destination of choice for domestic and international visitors alike, it is essential that all key stakeholders are invested in one cohesive brand for the CWQ. A collectively agreed regional brand will ensure that all activities and investments are aligned. The brand should be informed by targeted demographic analysis and should distinctly resonate with visitors in key target market areas. This can be informed and adapted as a result of the insights gained from the "Digital Passport", over time.

A brand marketing strategy should also be developed encompassing a co-ordinated approach to digital marketing across the region. This will ensure there is consistency of brand and message being communicated to the market.

This recommendation aligns with the RAPAD Central West Digital Strategy.

3. Develop business cases and seek investment

Funding is essential to the delivery of infrastructure and catalytic tourism projects. Once the Priority Tourism Development Plan has been finalised, businesses cases should be developed for the major projects to attract private sector investment and funding.

4 SUMMARY

The Central West of region Queensland is an area of outstanding natural beauty with charismatic communities and enormous potential. The region has evolved many times over its amazing history and is now ideally placed to continue that transformation journey.

With a greater increase in experienced based authentic tourism, the region offers an unparalleled prospect for domestic and international, leisure and business visitors alike.

To grasp this growth opportunity, the region must act as a collective. It must be willing to embrace the changes needed, to adopt digital ways of working and to invest.

In doing so, the region can still continue to maintain a collaborative approach to tourism development across the Outback region, however it must be willing to step outside its comfort zone in order to grow its share of the pie for the ultimate benefit of the community and sustainability of local economies.

APPENDIX 1 BRIGHT IDEAS



At the Tourism Futures Forum held in August 2018 at the Local Government Association of Queensland, member councils and stakeholders of the CWQ region gathered to workshop and develop a variety of ideas that would drive the growth of tourism in region. The following summary provides an overview of the top ideas workshopped by participants on the day of the forum.

RAPAD Master Vision and Implementation Plan

All RAPAD stakeholders agreed that a single consolidated strategy must be established that includes a master vision and implementation plan as a high priority. As a foundation next step, the master implementation plan is to be the platform on which all other projects are based.

The RAPAD forum group feels that the region lacks a strategic direction in its tourism goals and is suffering from incoherent messaging being portrayed by stakeholder governments and industries. With a single, targeted messaging and action platform, it will enable the region to work together and create growth in tourism for all members involved.

The formulation of a master plan will also create a forum for the region to decide on a set of priority infrastructure projects. This will provide a unified front when applying for government funding as each priority project will have the backing of all RAPAD stakeholders and have gained the consideration necessary for a solid business case.

Connectivity to the region, both physical and digital, is the key underlying issue that will be addressed through the implementation plan. Accessibility to the region by the broadest possible demographics of consumers requires good infrastructure in place to support capacity and provide a positive experience.

It is the aim of RAPAD to have the Master Implementation Plan completed by the end of FY18/19 with a view to begin implementation come the start of the new financial year.

Black's Palace

The RAPAD region is home to some of the most ancient anthropological sites in the world. Aboriginal cultural heritage is a major untapped tourism experience for the region, and the Palace is a prime location that can be opened to both tourism and educational audiences.

The Bidjara people, traditional owners of the land, have expressed an eagerness to work on a project to open the site and implement supporting infrastructure such as sealed roads and informational signage. Indigenous employment is also a priority for the project and would provide cultural knowledge and experience to the attraction.

The project would require a minimum of 70kms of sealed road to be built with supporting business and cultural studies to be completed. Costs would need to be estimated in the preparation of a business case when presented to government.

A long-term goal of the project is to position Queensland as a leader in showcasing indigenous art and culture to the world, allowing for other sites of cultural significance to be developed and an indigenous cultural experience to be formed for tourists in CWQ.

Schools Program Expansion

The Outback Schools Education subsidy, currently run by Tourism and Events Queensland, aims to encourage Queensland schools to take years 5 through 9 to visit Queensland's outback by providing a subsidy of \$130 to each student. This program is used to attend educational experiences such as the Australian Age of Dinosaurs Museum and farming homestead programs.

This program allows for children to come in large numbers to the region outside of peak tourist season and attend attractions as part of a prescribed curriculum that includes Indigenous history, settler history, archaeological science and astronomical science, among other subject programs.

This serves to expand the region's visitor base and promote the outback experience via word of mouth of children to their parents and friends.

With an expansion of this program, coupled with new and existing infrastructure offered by the region, growth could be seen in confirmed and consistent youth visitors to the region in off-peak season. The schools program has been found to bring consistent funds as, according to the existing schools program director, parents are willing to contribute significantly for their children to have positive educational experiences.

Cost of the program may be a barrier as the state department has already expressed the view that other organisations should be found to maintain the program. Expansion may be difficult without sustained commitment from the State Government. However, with a solid business case formed providing for benefits both to education and the region, this can be alleviated.

Age of Dinosaurs Museum Expansion

The Australian Age of Dinosaurs Museum, located south-west of Winton, is home to the largest collection of Australian fossils in the world. It consists of three facilities that uncover, collect and prepare fossil specimens for research and display. The museum is already a prime attraction of the RAPAD region bringing families and school children and providing an educational and enjoyable experience for all.

Given that the museum is having success in attracting visitors to such a remote location, a business case is being created to attract funding grants and philanthropic donations for a \$50 million expansion of the centre. This will enable the museum to offer new experiences and provide capacity to educational groups attending in larger numbers.

The museum is also looking to expand its operations into astronomical experiences with the outback being perfectly positioned to gain a "pure" and uninhibited view of the stars due to a lack of light pollution. Combining this with a digital expansion that allows for remote interaction, the museum will serve both as an attraction for the region and an active tourism showpiece for those around the world.

RAPAD Rentals Hire Car Program

The RAPAD region faces a serious transportation issue when travellers arrive by air. Hire car companies are reluctant to service the area as it has a dispersed and inconsistent visitor base and most arrive to the region with their own transportation.

To address this issue the RAPAD group could provide a hire car service based on repurposing council vehicles that have reached end of life after two years. Proposed is for each air connected location to house two vehicles available for hire by arriving travellers.

Initial cost to begin the program would be low and can be shared among the RAPAD member LGAs. The forum proposes that two existing council vehicles be provided to the program by each council and for this to continue with new vehicle replacement cycles.

Central Western Train Experience

Central Western Queensland was once home to a very active rail line however some lines were closed in 2008. Rollingstock has also been decommissioned in the area, resulting in negative community impacts and both direct and indirect job losses.

There remains a nostalgic romance with railways which attracts global interest. The railway has played an important role in Queensland and today, the base infrastructure remains. The current railways are still in operation and has the capacity and capability to better connect the regions' tourist destinations.

Within North-West Queensland, limited self-contained routes like the [Gulf Lander](#) have been able to stimulate tourism. Beyond the railway infrastructure, the main asset has been the iconic Queensland built rail car. Such an asset in CWQ would be a more dynamic and accessible way to leverage the rail infrastructure.

Given the distances in CWQ region, an opportunity exists to leverage the rail line to establish more dynamic tourism capabilities and enable tourism growth. Rail holidays already hold strong appeal, combined with a 'hop-on hop-off' rail car between major tourism assets, the CWQ region can create a more accessible tourism product for a range of markets and demographics.

To address this, it was identified that the region should seek to secure a restored 2000 Series rail motor to be used as both as a tourism experience and improve mobility across the region.

This historical and unique experience would better enable visitor distribution across the region and would enable economic opportunities to be unlocked by smaller towns across CWQ by adding to the region's iconic outback tourism experience offering.

It is understood that the main line from Emerald to Winton is currently open and in good condition for a rail motor and the rail infrastructure that mostly underutilised or not required by commercial operators.

A 2000 Series rail motor has enormous potential to leverage existing infrastructure which is mostly in sound condition and revitalise communities along the line through tourism.

Other Ideas Pitched

A number of other ideas were pitched but not developed, these are outlined below:

Data Collection and Analytics Program: Define a methodology of collecting, sharing and analysing data within the region for use in service delivery and performance measurement.

Online Tourism Package Portal: A one-stop-shop for packages that combine attractions into defined bundles with all logistics sorted.

Multi-language Tourism Infrastructure Program: Provide better language support for international tourists through multi-language signage and informational guides.