Outback DESTINATION TOURISM PLAN
2017-2020
EXECUTIVE SUMMARY

This Destination Tourism Plan (DTP) is Outback Queensland’s central strategic tourism document, guiding the region’s marketing, product and experience activities. Having recognised the economic importance of tourism, Outback Queensland’s DTP has undergone a review in 2017 to ensure that it contains the most up-to-date information and remains relevant.

2020 TARGET

Grow visitor expenditure to $585 million; $75 million above ‘natural growth’ estimates through targeted marketing, increased exposure and tailored products, and activities in key market segments.

VISION

The number one choice for an authentic Australian Outback experience and adventure for families.

GOALS

- Position Outback Queensland as the home of ‘authentic and engaging’ Australian Outback Experiences
- Leverage the existing calendar of events to create a call to action for travelling to the Outback
- Extend the average length of stay and number of activities participated in within the region
- Attract new visitors to the region through the appeal of education, paleotourism and adventure experiences

KPIs

1. Increase Outback Queensland’s share of the national outback family and working couples camping market
2. Increase domestic visitor seasonality during the off-peak months of January and October to Australian Outback levels
3. Grow the average participation rates of domestic visitors by 2.5 activities per visit in 2020
4. Regain the average length of stay (ALOS) for key markets (couple camping, family camping and long-haul drive) to 2012 measures
5. Increase our share of key target markets to drive total visitor expenditure

Destination Strategies

- Nature and Culture
- Experiences
- Markets
- Partnerships
- Quality, Service and Innovation
- Investment and Infrastructure
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DISCLAIMER
The information and recommendations provided in this document are made on the basis of information available at the time of preparation and the assumptions outlined throughout the document. While all care has been taken to check and validate material presented in this report, independent research should be undertaken before any action or decision is taken on the basis of material contained in this report. This report does not seek to provide any assurance of project viability and EarthCheck accepts no liability for decisions made or the information provided in this report.

Unless otherwise stated, all tourism statistics presented in this document are courtesy of Tourism Research Australia, for the Year Ending December 2016.
SETTING THE SCENE
The Role and Economic Contribution of Tourism and Events

In the year ending December 2016, the Outback was host to 513,000 domestic overnight visitors, 224,700 day trip visitors and 22,000 international visitors.

Figure 1 below shows the significant contribution of tourism to the Outback regional economy, with 4,580 jobs directly supported by tourism, while contributing $461 million in overnight visitor spend to a number of sectors within the Queensland economy based on estimates from the National Tourism Satellite Accounts prepared by Deloitte Access Economics.

While the tourism industry is still only a relatively small sector for the destination in comparison to the mining and agricultural sectors, it is seen as part of a sustainable long-term pathway towards a diversified and vibrant economy.

Figure 1: Direct Visitor Benefits to the Outback Economy

![Diagram showing the economic benefits of tourism in the Outback](image)

- **Accommodation & Food Services:** $180.5M, 1,880 Direct FTEs
- **Transport:** $135.5M, 1,420 Direct FTEs
- **Travel & Tour Operators:** $13.9M, 145 Direct FTEs
- **Arts & Recreation:** $17.9M, 187 Direct FTEs
- **Retail Trade:** $54.5M, 567 Direct FTEs
- **Education & Training:** $19.8M, 207 Direct FTEs
- **Other Industries:** $38.9M, 174 Direct FTEs

**OUTBACK QUEENSLAND 2016**

Overnight Visitor Expenditure: $461 million
Direct Jobs: 4,580 FTEs

1 Based on Access Economics estimates in the Tourism Satellite Accounts and for every $96,000 of visitor spend in Outback Queensland, one full time employee (FTE) is created or supported.

2 Visitor expenditure impact is derived from actual overnight expenditure (IVS/NVS) plus estimated indirect visitor expenditure, plus generated taxation revenues.
ABOUT THE DESTINATION
Destination Profile

Queensland’s Outback is a vast, rugged and unspoilt destination, offering a variety of natural, cultural and historical attractions in a vast proportion of the State (see Figure 3). National parks and the natural features of the landscape cater for a range of special interest activities, including inland fishing, dinosaur ‘digs’, fossicking, bird watching and four wheel driving as well as some of the world’s best stargazing and rural experiences. The destination boasts numerous authentic heritage attractions and vibrant country towns that bring the legends and the stories of the ‘outback’ to life.

Figure 2: Destination Map

Despite its population, the Outback plays an essential role in Queensland’s economic growth and Gross Regional Product, with a predominant farming and agricultural industry supported by a fast growing mining and resources industry.

With such rapid growth in the mining sector over the past decade, the tourism industry in the Outback has faced increasing competition as a priority for economic development. On the other hand, the mining boom has also resulted in rapid development and infrastructure growth for many towns across the destination, providing necessary infrastructure to support future tourism development.

COMPETITIVE STRENGTHS

The main competitive strengths of Outback are:

- **Diversity of experiences** across the destination offering visitors an authentic holiday;
- **Relaxed and peaceful** atmosphere;
- Free camping areas;
- **Good network of roads**
- **Easily accessible via car, rail, air and bus**;
- **Attractions relating to Australia’s pioneering heritage**;
- **Australian wildlife and geography**;
- **Accessible desert** experiences;
- **Events** and entertainment;
- **Pristine, safe** ‘old world’ towns;
- **Authentic** Queensland country history and heritage;
- Considered a ‘**genuine**’ Australian destination;
- **Diverse** landscape and **natural** environment;
- **Dinosaurs and fossils** (palaeo-tourism);
- **Astronomy**;

Outback Destination Tourism Plan 2017-2020
Destination Hero Experiences and Themes

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

In the Outback Destination Tourism Plan 2014-2020, four destination ‘hero’ experiences were developed to deliver the destination’s tourism vision, brand promise and the ‘themes’ that underpin the destination’s vision and brand.

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

Queensland’s Outback is famous for its characters, culture, history and ancient landscapes, where visitors feel the genuine Aussie embrace of a vast network of welcoming communities. The destination boasts numerous authentic heritage attractions and vibrant country towns that bring the legends and the stories of the ‘outback’ to life.

During the in-region consultation process undertaken for this review, it became evident from feedback collected that there should be minor amendments made to the hero experiences identified in the Outback Destination Tourism Plan 2014-2020. As a result below are the agreed ‘hero experiences’ moving forward to 2020:

**OUTBACK ADVENTURES**
Choose your Outback adventure; driving the wide open spaces to experience a timeless landscape and escape the concerns of everyday life; view an extraordinary variety of wildlife under an endless sky; visit a real working cattle station; or just soak up the camaraderie of shared memories.

Supporting Attributes and Potential Clusters:
Fauna including roos, bilbies (Charleville), amazing birds including emus, brolgas, wedge-tailed eagles; Gorges; lookouts; parks; Aboriginal rock art; real in-desert experiences (drives, tour operators and station stays)

**OUTBACK EVENTS**
There is a tradition in the Outback where all the exciting elements, and people, come together. Choose an Outback Event to experience an action packed stay, meet the locals and make a connection that will bring you back time and again.

Supporting Attributes and Potential Clusters:
Range of Outback events, cross several industry and political boundaries, NEW offering for consumers – short stay, action packed

**PALAEOTOURISM**
Feel the thrill as you follow in the footsteps of an ancient monster before you dig up your own dinosaur.

Supporting Attributes and Potential Clusters: Digs, tours, centres and trails

**HERITAGE AND LOCALS**
Take time to learn about the past and connect with the present, by exploring historic towns and getting to know the locals.

Supporting Attributes and Potential Clusters: Pristine; safe old-world towns; range of museums, galleries, history centres; larrikins and other friendly locals in the pubs, on the street, or at a festival
Competitor Analysis

Outback Queensland possesses four distinct ‘hero experiences’:

- Outback Events.
- Palaeotourism;
- Outback Adventures; and
- Heritage and Locals

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

In the domestic arena, the Outback competes with other destinations frequented by visitors regarded as ‘Connectors’.

For ‘Connectors’, holidays are about bonding with family and friends. They will often compromise their own preferences in terms of activities to ensure everyone has a good time - it’s about what is real and what’s important. The core drivers behind a Connector’s ideal holiday in the destination are to ‘explore’, have new experiences, and leave the cares of the world behind. They believe the Outback can deliver this.

Connectors are by far the largest segment traveling in Australia, covering 4.8 million consumers and accounting for 61% of those who travel to the Central West of Outback Queensland (not available for other regions).

Research has shown that 98% of all visitors to the Outback are from the domestic market. As such, the primary method of market segmentation has been aligned with the approach of Tourism and Events Queensland.

Of the Outback’s four hero experiences shown in Table 3, two prove to be relatively unique against domestic and international competitor destinations. These experiences are Palaeotourism and Outback Events.

**Table 3: Competitor Analysis against the Hero Experiences**

<table>
<thead>
<tr>
<th>Destination</th>
<th>Outback Events</th>
<th>Palaeotourism</th>
<th>Outback Adventures</th>
<th>Heritage and Locals</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Outback</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Southern Queensland Country</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tropical North Queensland (inc. Cape York)</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capricorn Region</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Outback NSW</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Red Centre (NT)</td>
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<td></td>
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<td>✓</td>
</tr>
<tr>
<td>Katherine Region (NT)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kimberley Region (WA)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pilbara Region (WA)</td>
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<td>Colorado</td>
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<td>✓</td>
<td>✓</td>
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</tr>
<tr>
<td>Mexico</td>
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<td>✓</td>
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</table>
MARKET OPPORTUNITIES
Current Visitor Profile

Visitors

In the year ending December 2016, the Outback received approximately **531,000 domestic overnight visitors** and **224,000 domestic overnight holidaymakers**. This represents a **13.6% growth** in domestic overnight visitors and a **25.5% growth** in domestic overnight holidaymakers in the past three years.

In terms of international visitors, the Outback received **22,000 international visitors** this past year (YE December 2016).

Visitor Nights

In the year ending December 2016, **domestic overnight visitors** to the Outback stayed a total of **2,111,000 nights**. In this same period, **international visitors** decreased by **11.5% to 208,000 nights**.

Origin of Visitors

The domestic market is vital to Outback regional visitation with most domestic visitors also living in Queensland and traveling intrastate to/within the Outback. The 1.4 million intrastate nights account for 65.4% of all domestic nights in the region.

International Visitation

Visitation from the region’s largest market, Europe (including the UK) increased 4.9% to 11,000 visitors in the three years ending December 2016, however Europeans spent less nights in the region, suggesting they may be opting for shorter holidays.

Purpose of Visit

The primary purpose of visit for overnight visitors to the Outback is **business** (largely driven by the domestic market), followed by **holiday** and then **visiting friends and relatives (VFR)**.

![Figure 4: Purpose of Visit – Overnight Visitors](image)

Business travel to the Outback remains a **core purpose sector**, accounting for 159,000 of total domestic overnight visitors.

Expenditure

For the year ending December 2016, it is estimated that total domestic overnight expenditure in the Outback equated to approximately **$314.1 million**. Unfortunately expenditure data for the international market is not available.

While average spend per nights of both international and domestic visitors have remained stable in recent years, international spend in the overall Queensland market has increased significantly, highlighting a clear gap between the Outback and Queensland in relation to international market spend per night (see Table 5).

### Table 5: Spend per Night Trends 2013-2016

<table>
<thead>
<tr>
<th></th>
<th>Outback</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>$ Change compared to 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Int.</td>
<td>$34</td>
<td>$35</td>
<td>$35</td>
<td>$35</td>
<td>$35</td>
<td>$1</td>
</tr>
<tr>
<td>Dom. O/N</td>
<td>$138</td>
<td>$131</td>
<td>$118</td>
<td>$135</td>
<td>$135</td>
<td>$3</td>
</tr>
<tr>
<td>Q/LD</td>
<td>$56</td>
<td>$56</td>
<td>$60</td>
<td>$98</td>
<td>$98</td>
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</tr>
<tr>
<td>Int.</td>
<td>$56</td>
<td>$56</td>
<td>$60</td>
<td>$98</td>
<td>$98</td>
<td>$42</td>
</tr>
<tr>
<td>Dom. O/N</td>
<td>$187</td>
<td>$171</td>
<td>$173</td>
<td>$185</td>
<td>$185</td>
<td>$2</td>
</tr>
</tbody>
</table>
Average Length of Stay

While domestic overnight visitation has increased, the average length of stay (ALOS) of domestic overnight visitors for the five years to September 2016 has declined, in-line with the overall Queensland trend (Figure 6). This trend is opposite to that of Outback’s competitors (Outback NSW and Flinders Ranges & Outback), which have both increased in ALOS.

The average length of stay of domestic overnight visitors decreased from 5.1 to 4.3 nights, caused by more visitors spending fewer nights in the destination. However, this remains higher than the State average of 3.96 nights.

Figure 6: Domestic ALOS (days) vs. Competitors

International visitors stayed in the Outback for an average of 12.7 nights and this has declined by 3.3 nights since 2012. This ALOS in the Outback is significantly higher than coastal destinations such as the Fraser Coast (4.83), Whitsundays (6.61) and Tropical North Queensland (7.54); however it is still below the State average of 20.81 nights.

Activities

Eating out at restaurants is the most popular activity for domestic overnight and international visitors to the Outback. This is followed by pubs, clubs and discos for domestic visitors and sightseeing/looking around for international visitors. Data suggests a preference towards social activities in both markets.

Figure 7 shows the figures highlighting the top eight activities for the domestic overnight market.

Figure 7: Top Eight Domestic Overnight Visitor Activities (YE September 2016)
Market Opportunities

**Holidays** make up the second largest market when it comes to overnight visitation to the Outback (34%). This market has traditionally been based on a drive market with a long length of stay in region. This segment provides an excellent opportunity to grow and contribute to the achievement of 2020 targets. However, to achieve this will require repackaging of available product (to meet new demand of short break, high action, higher spend holidays) and improvements in the distribution of saleable experiences.

**Visiting Friends and Relatives** becomes a key market opportunity when considering 20% of all domestic overnight visitors come to the Outback stay, or in the length of stay, by visitors could dramatically impact on the value of the visitor economy.

**Business Tourism** accounts for more than one in three domestic overnight visitors to the Outback region (36%) and is the largest market. While most have only short stays in the region, a dedicated program of increasing average length of stay by adding leisure experiences could generate significant additional value to the region.

Market Segments

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

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

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

Internationally, the Outback destination offers products that deliver five of the seven experience themes (not including Australian Coastal Lifestyle and Australian Major Cities).

**OUTBACK TARGET MARKETS**

**Tier One**
- Connectors in Brisbane, Sydney, Melbourne and Regional Queensland.

**Tier Two**
- Connectors in regional New South Wales and Victoria; and
- Active Explorers in Brisbane and Regional Queensland.

**Tier Three**
- New Zealand, United Kingdom, Germany, France, Netherlands and Switzerland

**Domestic**
Tourism and Events Queensland’s (TEQ) research into the domestic market has defined five ‘experience based’ market segments. The Outback offers experiences that deliver on three of the primary Queensland experience themes but none are exclusive to the destination. These market segments are:
1. Outback and Adventure
2. Natural Encounters
3. Queensland lifestyle
4. Events

The challenge remains to carve out a unique selling point in the same way other destinations have managed to achieve (Bundaberg turtles, Whitsunday island luxury, etc.)
National Domestic Camping Market Profile

With 12% of all trips undertaken by domestic overnight visitors in 2016 were camping and caravanning self-drive market, there is a significant opportunity for Queensland to increase its share of this market (currently 2%).

Figure 8 shows that since 2012, Australia’s total domestic camping visitors have remained on a steady incline, with an overall growth of 24%, growing 6% per annum. This strong growth indicates that the domestic market for camping in Australia should continue to grow in coming years, and is a valuable market to retain for the future.

Visitor Travel Party
Within the National Domestic Camping market, there are five major travel parties. In figure 10, ‘Family group’ shows as one of the major travel parties which has managed to retain the most consistent amount of visitors since 2012. The travel party of ‘friends or relatives without children’ has seen the largest increase since 2012.

Origin
When comparing the demographic profile of visitors to Australian outback camping destinations there is very little difference between how many visitors originate from the city or regional areas (see Figure 10). This indicates that there is strong interest in the outback in general from both areas.

Outback Destination Tourism Plan 2017-2020
Visitor Life Stage Segments
Compared to five years ago (2012) there has been a noticeable shift in visitors life stage segments (figure 12) for visitors across all visitor purposes in the Outback. Those markets which show the most growth include young singles living alone, Midlife singles and Young/midlife couple with no kids. Older non-working married person’s remains the highest life-stage segment throughout, which is expected due to the popularity of the nomadic lifestyle for retired Australians.

ALOS
The average length of stay (ALOS) for outback camping and caravanning across Australia is dominated by Australia’s North West with 9.2 nights. Outback Queensland shares similar nights to others with 4.5 nights (see table 11).

Table 11: Average Length of Stay for Outback camping and Caravanning Across Australia

<table>
<thead>
<tr>
<th>Dom Camping &amp; Caravanning</th>
<th>ALOS 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Australia</td>
<td>5.2</td>
</tr>
<tr>
<td>Outback QLD</td>
<td>4.5</td>
</tr>
<tr>
<td>Country &amp; Outback NSW</td>
<td>4.2</td>
</tr>
<tr>
<td>Australia’s North West</td>
<td>9.2</td>
</tr>
<tr>
<td>Australia’s Golden Outback</td>
<td>3.3</td>
</tr>
<tr>
<td>Flinders Rangers &amp; Outback</td>
<td>4.5</td>
</tr>
</tbody>
</table>

Figure 12: Life Stage Segments for Outback Queensland 2012 and 2016 comparison

Camping Market by Outback States and Territory
The Map below (see Figure 13) shows where the Outback Queensland market sits in relation to all outback camping and caravanning across Australia. Country & Outback NSW holds nearly half the market with 44%. Central Australia and Australia’s North West have the least share with 9% and 6% respectively.

Figure 13: Map of Outback Queensland Market Share of all Australian Domestic Camping and Caravanning
Growing Trends in Camping

The sales of camping vehicles is often a good indicator of future travel trends. The data below provided by Queensland Transport shows the registration trends for caravans continues to climb, well in excess of the motorhome, 5th Wheeler and Campervan market. The fastest growth in 2015-2016 however has been in Campertrailers, a product popular with young families.

Australia’s Six Outback Region Comparison

Outback Queensland makes up one of the six outback regions in Australia. The other five regions are:
- Country and Outback New South Wales (NSW)
- Central Australia;
- Flinders Ranges and Outback;
- Australia’s North West and;
- Australia’s Golden Outback

All six outback regions make up the entire Australian outback camping market. The following ranking diagram shows each region’s market share in the following areas:
- Total Visitors
- Total Nights
- Expenditure
- Number of Activities

HOW DOES OUTBACK QLD COMPARE WITH OTHER OUTBACK DESTINATIONS?

<table>
<thead>
<tr>
<th>Visits</th>
<th>ANW</th>
<th>NT</th>
<th>QLD</th>
<th>AGO</th>
<th>NSW</th>
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</thead>
<tbody>
<tr>
<td>%</td>
<td>6%</td>
<td>8%</td>
<td>13%</td>
<td>17%</td>
<td>44%</td>
</tr>
<tr>
<td>Nights</td>
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<td>NT</td>
<td>QLD</td>
<td>AGO</td>
<td>NSW</td>
</tr>
<tr>
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<td>12%</td>
<td>13%</td>
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<td>44%</td>
</tr>
<tr>
<td>Expenditure</td>
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<td>QLD</td>
<td>AGO</td>
<td>NSW</td>
</tr>
<tr>
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</tr>
<tr>
<td>Activities</td>
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<td>AGO</td>
<td>NT</td>
</tr>
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<td>1.9</td>
<td>2.8</td>
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</tbody>
</table>
Vision and Goals

The Outback Vision

“The No.1 choice for an authentic Australian Outback experience and adventure for families”

The Outback Mission

“Connect every visitor with an authentic and memorable Australian outback experience and adventure”

Our Goals

- Position Outback Queensland as the home of ‘the authentic and engaging Australian Outback experiences’. Market the region as - Don’t just see the outback DO the outback – and back the statement with a series of activities and events.
- Leverage the existing calendar of events to create a call to action for travelling to the outback.
- Increase the overnight expenditure and the number of activities participated in within the region.
- Increase Outback Queensland’s share of the family camping market, targeting young families with appealing new family-friendly activities.
- Attract new visitors to the region through excitement and appeal of ‘education, Palaeotourism and adventure.’
What does the future hold?

Tourism Megatrends

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

1. The Orient Express
   The world economy is shifting from west to east and north to south. This is creating new markets and new sources of competition.
   Implications for the Outback
   - Asian visitors currently make up a very small proportion of Outback visitors. To capitalise on the anticipated national growth, it must have a clear Asian market strategy including:
     - The need to build understanding and awareness of their needs; and
     - More businesses being ‘international-ready’.

2. A Natural Advantage
   In a world where ecological habitats are disappearing, the unique natural assets of Queensland will become a stronger drawcard.
   Implications for the Outback
   - The destination needs to develop tourism experiences in natural areas that are unique and differentiated from competitors to take advantage of this trend; and
   - Partners need to develop compelling experiences which stand out in the marketplace.

3. Great Expectations
   Tourists of the future will have expectations for authentic and personalised experiences often involving social interaction.
   Implications for the Outback
   - Businesses need to respond to the challenge and deliver quality service and experiences.

4. Bolts from the Blue
   Climate change and infectious disease outbreaks combined with safety concerns will have an increased impact. Economic ‘shocks’ (whether planned or unplanned) resulting from rapid acceleration or downscaling also will have a significant impact.
   Implications for the Outback
   - Businesses and tourism managers need to monitor opportunities and be ready to respond, with imaginative marketing, packaging and pricing offers; and
   - Businesses and destination managers need to be ‘disaster-ready’ and have resilience plans in place.

5. Digital Whispers
   People are changing the way they access and trust information in an online world.
   Implications for the Outback
   - The destination needs to embrace a multichannel approach to communication and promotion. This includes building business skills and capacity and delivering new virtual travel/experiences in the form of providing rich information.

6. On the Move
   Humanity is increasingly mobile with people travelling further and more frequently for trade, business, events, education and healthcare.
   Implications for the Outback
   - Maintaining air, rail and road access is key to maximising the potential of this trend. Particularly for the Outback, it is important to maintain key transport corridors, open new areas for four wheel driving routes, capitalise on train infrastructure, and invest in regional airports.

7. The Lucky Country
   Australia and Queensland are increasingly wealthy, but expensive destinations are gifted with cultural and demographic diversity.
   Implications for the Outback
   - The need to compete on quality, experience and service will have implications for investment and development decisions and destination and business levels.
Destination 2020 Target

In the previous DTP published in 2014, Outback Queensland’s 2020 target was achieving $445 million in total tourism expenditure, which was derived from Queensland’s 2020 target aspiration of $30 billion. However, having already surpassed this goal (influenced by boundary changes), a new 2020 target has been established.

Outback Queensland’s Destination 2020 Target follows the annual growth rates of visitors, nights and expenditure determined by the Tourism Forecasting Committee (TFC). As these have been determined using national data, the estimated $585 million in total visitor expenditure in Outback Queensland by 2020 is a ‘Stretch’ target, assuming that the region can follow these national growth rates (see Figure 14).

As a more ‘natural growth’ base forecast, the Consumer Price Index forecast rates for Australia (domestic visitors) and key international countries (international visitors), have been applied to 2020, with an estimated $510 million in total tourism expenditure forecast for 2020.

In order for Outback Queensland to meet this Stretch target and go beyond natural growth estimates, the destination needs to maintain their current share of visitors, as well as grow key target markets, where they have significant opportunity to increase their visitor share in these national segments (See page 32-33).

Key Performance Indicators (KPIs) outlined in the following pages will help to achieve the Stretch target.

**Figure 14: Outback Queensland 2020 Tourism Expenditure Targets**

TARGET: Grow visitor expenditure to $585 million; $75 million above ‘natural’ growth through targeted marketing and increased exposure and tailored activities for key market segments.
National Family Camping Market Visitors Profile

Family Camping is a major market within the National Domestic Camping market. Family Camping is camping which involves a family unit (normally two parents and children). Figure 15 shows a slight drop in visitor numbers in the nation’s family camping market since 2013.

Figure 15: National Family Camping Domestic Visitors

The map in Figure 16 shows where Outback Queensland market sits in the family camping and caravanning market in Australia. Country & Outback NSW has the highest share of family camping and caravanning market with 31%. Outback Queensland ranks 5th with a 10% share which indicated that there is high potential to grow and capture a greater majority of this marker. There is currently no available data for Australia North West.

Figure 16: Map of Outback Queensland Market Share of Family Camping and Caravanning in Australia

KPI #1: Increase Outback Queensland’s share of the national outback family camping market.
Outback Queensland Visitor Seasonality

High variances in visitor seasonality patterns is a common characteristic across many Queensland destinations, where external factors such as weather and school holiday periods can have major influences on dates of travel. However, these troughs of visitation can have significant impacts on the local community and economy.

Outback Queensland’s aim for 2020 is to increase visitation during low visitor periods, to help reduce the impact of visitor troughs and create more constant visitation over the year; becoming a ‘year-round’ destination.

Outback Queensland’s domestic visitor seasonality is measured on a monthly basis by Tourism Research Australia and depicts three low visitation periods between October to January and during June (see Figure 17). The average of other Australian Outback regions shows similar low visitation rates in June, however there is a peak in visitation in January and October, opposite to that of Outback Queensland. Increasingly, Outback Queensland should aim to increase visitation through these low seasons, through targeted marketing and events. Events are an effective way of drawing in visitation and encouraging overnight stays (especially through multi-day events) during off-peak months.

Figure 17: Seasonality of Domestic Visitation, 2016

![Figure 17: Seasonality of Domestic Visitation, 2016](image)

KPI #2: Increase domestic visitor seasonality during the current off-peak months of January, June and October to Australian Outback levels.
Engagement in the Experience
To reach the 2020 Stretch target, Outback Queensland needs to maintain or idealistically improve the amount of activities that visitors are engaging in. Currently the region is in the mid to high range of activities participated per international (IVS) and domestic (NVS) visitor, compared to other Australian Outback regions (see Figure 18). By using these comparator destinations as a benchmark, by 2020 Outback Queensland should aim to reach 5.5 activities engaged per domestic visitor and 14 activities engaged per international visitor (recognising the longer ALOS for international visitors).

*Figure 18: Average Number of Activities Participated In, 2016*

**Example Experiences:**

**NATURAL ENCOUNTERS**
- Package and promote family friendly camping adventures
- Develop new 4WD touring loops and itineraries to inspire the next wave of travellers
- Partner with coastal destinations to create iconic fishing experiences

**OUTBACK EVENTS**
- Investigate the potential for niche events (golf, palaeotourism, ironman, technology, etc) to extend the season and introduce new markets to the region
- Continue to support and promote existing events with the potential to grow more visitors in addition to local growth

**ADVENTURES & DISCOVERY**
- Leverage major events such as World Science Festival to raise awareness of the unique selling points of Outback Queensland as a paleotourism destinations
- Support the development of new interactive Palaeotourism experiences including virtual and augmented reality

**QUEENSLAND LIFESTYLE**
- Create a new program for reinvestment and promotion of iconic Outback Pubs with the department of Environment and Heritage
- Work with the National Trust to develop and promote ‘stays with a story’ as a unique way to experience the outback

**KPI #3: Grow the average participation rates of domestic visitors by 2.5 activities per visit in 2020.**
Average Length of Stay (ALOS)
The largest visitor markets for Outback Queensland are Couple Camping, Adventure and Long-haul drive markets. The ALOS of the Couples Camping market has been on a steady decline since 2012, with first evidence of an increase in 2016. Long Haul Drive peaked at nights in 2012 and since has struggled to rise above 6 nights (see Figure 19). The aim for all three of these key visitor markets for Outback Queensland is to regain their lost ALOS from the previous years.

The ALOS targets for all three markets are therefore as follows:

<table>
<thead>
<tr>
<th>Market</th>
<th>2016</th>
<th>2020 Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Couple Camping</td>
<td>4.8</td>
<td>6.0</td>
</tr>
<tr>
<td>Family Camping</td>
<td>5.8</td>
<td>7.0</td>
</tr>
<tr>
<td>Long-Haul Drive</td>
<td>6.0</td>
<td>9.0</td>
</tr>
</tbody>
</table>

Figure 19: ALOS of the Top 3 Visitor Markets for Outback Queensland, 2016

KPI #4: Regain the ALOS for key markets (couple camping, family camping and long-haul drive) to 2012 measures.
Destination Growth Priorities

The following priority strategies have been identified for the Outback:

1. Position Outback Queensland as an active Outback experience. Include links to quirky events, hands-on experiences and once-in-a-lifetime moments.

2. Marketing and developing existing events to create a year round calendar of activities.

3. Develop new experiences centred around events that are quick escapes, action packed and pre-packages for distribution to attract a new breed of visitor.

4. Consolidate the work already commenced in:
   - Trade-ready mentoring
   - Education
   - Outback Mates
   - Digital mentoring
   - International Media and Trade Engagement

5. Work with clear KPI’s and report on success to engage communities and Local Government.

6. Create a Customer Journey Map for the Outback and identify the gaps and opportunities to better connect with each visitor.
2020 Target Markets

In order to achieve the additional $75 million of visitor expenditure required above ‘natural growth’ in 2020 to reach the destination target, the following goals in specific markets have been identified as key opportunities for the destination to focus on, recognising its limited funds, resources and time. The aim is that by increasing Outback Queensland’s market share from Queensland visitors in these identified markets, the region will be able to achieve the additional expenditure required above natural growth to meet the destination 2020 target.

LEISURE VISITORS

a) Couples Camping:
The market segment of Couples Camping are domestic visitors to Outback Queensland whose main purpose of visit is for a holiday. They travel using a self-drive vehicle, travel as a couple, and stay between 4-10 nights in region in a commercial or non-commercial camping ground or caravan park. Remaining steady over the past five years, Outback Queensland has the opportunity to grow this relatively short-trip drive market through tailored products and experiences. By capturing an additional 5% of Queensland’s Couples Camping Market by 2020, the region could see an additional $8.9 million in tourism expenditure.

b) Family Camping:
As opposed to the Couples Camping market, the Family Camping Market is a smaller segment of the market, fluctuating over the past five years. This market are those visitors who have the same characteristics as the Couples Camping market, however travel as a family group (parents and children). Of all Family Camping visitors to the Australian Outback destinations in 2016, Outback Queensland received approximately 10% of these. Whilst a small market in comparison, Outback Queensland has the opportunity to regain its market share from Queensland visitors by aiming to increase its market by 5% by 2020. If this is achieved, the region is forecast to gain an additional $6.8 million in visitor expenditure.

c) Adventure
The Adventure market is the largest segment out of the identified target markets for growth, with just under 40,000 domestic overnight leisure visitors participating in an adventure activity. These activities include visiting a national park, bushwalking and other outdoor activities, such as fishing, water sports, cycling, or attending a sporting event. As more products and events are implemented and gain in publicity and popularity, Outback Queensland could increase its market share of and participation in adventure activities. The aim by 2020 is to increase Outback Queensland’s share of the State adventure market by 2.5% by 2020, to gain approximately $23.8 million in visitor expenditure.

d) Events
With events becoming an increasing motivator to visit a region, Outback Queensland could continue to add to its already popular events calendar and focus on event development to increase motivation to visit. With approximately 4% of Outback Queensland’s domestic overnight market travelling to the region for the purposes of an event, the region has the potential to grow this market by 5% by 2020, contributing approximately $12.6 million in additional visitor expenditure.

e) Long Haul Drive
With Outback Queensland currently capturing 44% of the total Queensland long-haul drive market (11+ nights), there is a significant opportunity to continue to build products and experiences that capture this growing market, particularly aimed
towards the grey nomads who are more available to commit to these long holidays. If successful, growing Outback Queensland’s share of the State Long-Haul Drive market by **6% in 2020** (total share goal of 50%) could see the region receiving an additional **$22.4 million in visitor expenditure**.

**EDUCATION**

Separate from the leisure market, traveling for the purposes of education is a rapidly growing segment, with some initial trends indicating that growth across all of Central Australia in this market is higher than the nation as a whole. Since the release of the *Australian School Education: Tourism Activation Plan 2014*, the Northern Territory’s education tourism market has experienced:

- An 11% increase in the number of school students visiting the Northern Territory;
- A 14% increase in school group bookings from our operators with an average night stay of 8 nights per excursion;
- Excursions charged at an average of $141 per student, per day;
- An estimated $8.2 million was spent with dedicated educational tour operators visiting the Northern Territory with further growth anticipated; and
- An estimated $3.3 million injected into the Northern Territory attributed to 40% of ‘on tour spend’.

Although current data on the education visitor market in Outback Queensland is not able to be measured, there is the opportunity for the region to follow trends from the Northern Territory and Central Australia. Tourism and Events Queensland are aiming to double the number of students visiting region centres such as Longreach, Winton, Birdsville and Charleville. If Outback Queensland could capture just 1.5% of Queensland’s education market, the region could see almost an additional **$1.2 million dollars of visitor expenditure**.

Overall, if Outback Queensland were to achieve each of the predicted shifts in market shares by 2020, related to the target markets and opportunities identified, and assuming the average length of stay of each of the markets remains steady, the region is forecasted to achieve approximately $75.7 million in total visitor expenditure by 2020 (see Table 20 below). This would allow the region to achieve its destination 2020 target of $585 million - $75 million above ‘natural growth’.

**Table 20: Target Market Summary**

<table>
<thead>
<tr>
<th>Target Market</th>
<th>Current Share of Qld Market</th>
<th>Current Expenditure</th>
<th>Share Shift to 2020</th>
<th>Forecasted Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure Travel</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Couple Camping</td>
<td>15%</td>
<td>$16.2M</td>
<td>5%</td>
<td>$8.9M</td>
</tr>
<tr>
<td>Family Camping</td>
<td>7%</td>
<td>$7.6M</td>
<td>5%</td>
<td>$6.8M</td>
</tr>
<tr>
<td>Events</td>
<td>7%</td>
<td>$14.1M</td>
<td>5%</td>
<td>$12.6M</td>
</tr>
<tr>
<td>Adventure</td>
<td>3%</td>
<td>$20.1M</td>
<td>2.5%</td>
<td>$23.8M</td>
</tr>
<tr>
<td>Long Haul Drive</td>
<td>44%</td>
<td>$82.7M</td>
<td>6%</td>
<td>$22.4M</td>
</tr>
<tr>
<td>Education</td>
<td>n.d.</td>
<td>n.d.</td>
<td>1.5%</td>
<td>$1.2M</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td><strong>$75.7M</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**KPI #5: Achieve target market goals from share shift to achieve the $75 million of additional total visitor expenditure required to reach the 2020 destination target**
Implications of Growth

If the Outback hits the 2020 growth target it will generate in excess of **128,415** additional overnight visitor numbers. This increase has the following implications:

**Access**

These additional visitor volumes may have implications for road and air access. Roads will need to be maintained especially during peak seasons and major events. Regional airports will need to improve infrastructure and increase flight frequencies to cater for a higher volume of passengers.

**Attractions**

The projected increase in visitor numbers will need to be accommodated in National Park Management plans and Local Government Planning Schemes to support new attractions and visitor hubs (e.g. Longreach and Birdsville).

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

There will be a need for proactive promotion of development opportunities to unlock investment.

**Other Infrastructure**

A range of other infrastructure and services, from signage and public conveniences to town planning will need to respond to the growth.

A co-ordinated approach to destination planning and management is required in order to deliver a compelling set of experiences which entice new visitors and encourage repeat custom. The first step is engaging existing partners and re-engaging with new partners, raising awareness of the projected tourism growth and its potential implications. Strong relationships between Local Tourism Organisations (LTOs), Councils and the RTO will be required to ensure common, unified direction and focus on tourism.

**Destination Workforce**

Research by Deloitte Access Economics indicates that the Outback’s tourism workforce is under pressure from other sectors and will experience a short-fall under the TFC forecasts, let alone the 2020 stretch targets.

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

**Community**

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

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

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

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

<table>
<thead>
<tr>
<th>CHALLENGES</th>
<th>OPPORTUNITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Seasonality – Operation limited to 7 months per year due to weather</td>
<td>➢ Improve visitation in shoulder periods to extend season; create new ‘off-season’ product; implement event strategies to drive business in shoulder periods</td>
</tr>
<tr>
<td>2. Accessibility – Roads/Rail/Air; distance/cost/frequency</td>
<td>➢ Work with government to maintain existing routes; package product with transport operators for easier saleable product to incorporate cost/frequency challenges; encourage private investment in transport operations</td>
</tr>
<tr>
<td></td>
<td>➢ Work with Hire Car companies to allow easier access for international travellers including one-way hire (without the high costs) and off-road travel</td>
</tr>
<tr>
<td>3. In-region Perceptions – Business practices are not keeping pace with the changing market place limiting growth</td>
<td>➢ Shared agreement from government and private sector to invest in experience development; market readiness; packaging and distribution to expand the appeal and attract NEW markets</td>
</tr>
<tr>
<td>4. Consumer Perceptions – Overcoming consumer barriers to growth (too far, too hard to get to, nothing to do)</td>
<td>➢ Present NEW product offering – short time frame, action packed, fully inclusive available for sale in advance of the season (event focus)</td>
</tr>
<tr>
<td>5. Maintaining existing business (especially drive travellers), differentiating from competition and supporting future growth</td>
<td>➢ Incorporate recommendations from Drive Strategy; align product messaging with brand; encourage investment to increase technology accessibility across the region to incorporate in product offering</td>
</tr>
<tr>
<td>6. Measurement of Outback funding is based on a flawed model not representative of impact of tourism on the region</td>
<td>➢ Work with QTIC and government to educate on impacts of tourism in the Outback to amend the measurement model and ultimately attract funding</td>
</tr>
<tr>
<td>7. Capitalising on existing events</td>
<td>➢ Develop a practical events strategy to capture co-ordination, packaging and infrastructure opportunities, create an events calendar to share on council/tourism authority websites well in advance to avoid clashes and build shoulder periods and create awareness. Encourage third parties to consider establishing new events in the Outback</td>
</tr>
<tr>
<td>8. How to capitalise on natural assets opportunities (National Parks)</td>
<td>➢ Develop a co-ordinated approach between government, private operators (accommodation and touring operators) and distribution to provide consumers with awareness and saleable experiences</td>
</tr>
</tbody>
</table>
Enablers of Success

- Participation of all partners in development projects - infrastructure, experience packaging and readiness, investment and access.
- Maintaining existing access routes (road/rail/air) with agreement to increase frequency and decrease cost toward 2020.
- Completion of identified catalyst and region wide projects along with Central West NBN Regional Plan, Grow Mid-Western QLD Towns Project and the Outback Education Subsidy Scheme.
- Encourage stronger links between tourism and the resources sector to proactively encourage coordination to improve live-ability and sense of place.
- Strengthen partnerships in tourism and economic development.
- Build community appreciation and support for tourism and future investment.
- Maintaining and growing successful drive routes throughout the Outback.
DESTINATION STRATEGIES
Strategic Directions

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

Each of the strategies have been prepared around 6 key themes that were developed in the Tourism 2020 Strategy which will enable regions such as the Outback to develop products and experiences in line with their hero experiences. These themes are: 1) Nature and Culture; 2) Experiences; 3) Markets; 4) Partnerships; 5) Quality, Service and Innovation; and 6) Investment and Infrastructure. These are discussed on the following pages.

PARTNERS ACRONYMS

Industry – Tourism and Event Operators
OQTA – Outback Queensland Tourism Association
TEQ – Tourism & Events Queensland
DTMR – Department of Transport & Main Roads
QPWS – Queensland Parks & Wildlife Service
QTIC – Queensland Tourism Industry Council
Councils – All Councils within Outback region

TIMEFRAMES

Immediate (1-2 years)
Medium term (3-5 years)
Long term (beyond 2020)
1. **Nature and Culture**

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

**Vision:** To be a State leader in showcasing our natural and cultural assets through connecting visitors to our wealth of nature and culture-based experiences.

Leverage off significant natural and heritage attractions and third party partnerships to expand distribution of the key visitor experience messages.

<table>
<thead>
<tr>
<th>Product</th>
<th>Partners</th>
<th>Time</th>
<th>Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Encourage more <strong>family camping experiences</strong> through private campgrounds and national parks</td>
<td>OPWS, Industry</td>
<td>Medium</td>
<td>Holiday</td>
</tr>
<tr>
<td><strong>Increase trade mentoring program</strong> for operators (i.e. contracting with wholesalers) to enable the creation of packaging around natural and heritage attractions for distribution domestically and internationally</td>
<td>Industry, Council, OQTA, QTIC</td>
<td>Immediate &amp; Annual</td>
<td>All</td>
</tr>
<tr>
<td><strong>Encourage eco-tourism opportunities</strong> for accommodation and touring operators to build range of experiences on offer</td>
<td>Councils</td>
<td>Medium</td>
<td>Holiday</td>
</tr>
<tr>
<td>Work with operators to build <strong>indigenous experiences</strong> throughout the region and then incorporate in marketing messages</td>
<td>Councils, Aboriginal Organisations, OQTA, TEQ</td>
<td>Long-term</td>
<td>All</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Marketing</th>
<th>Partners</th>
<th>Time</th>
<th>Market</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Continue to stimulate travel via the ‘Outback Education Scheme’ targeting schools. (year 5-7)</strong></td>
<td>OQTA, TEQ</td>
<td>Immediate</td>
<td>Niche</td>
</tr>
<tr>
<td>Engage public and private sector to ensure <strong>online distribution</strong> and visibility of natural and heritage attractions is current and appropriately presented</td>
<td>OQTA, TEQ, Councils, Industry</td>
<td>Immediate</td>
<td>All</td>
</tr>
</tbody>
</table>
2. Experiences

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

**Vision:** Develop the Outback as an accessible destination with an abundance of experiences that showcase its key attributes to explore for the weekend or that once in a lifetime journey.

Develop new experiences centred around events that are quick escapes, action packed and pre-packaged for distribution to attract a new breed of visitor.

<table>
<thead>
<tr>
<th>Product</th>
<th>Partners</th>
<th>Time</th>
<th>Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>‘Hero’ events to create packaged experiences for distribution to domestic and international markets</td>
<td>Industry</td>
<td>Medium</td>
<td>VFR, Holiday</td>
</tr>
<tr>
<td>Attract or grow significant events which position the region as one that is accessible, and utilise the region’s unique environments</td>
<td>Council, OQTA, TEQ</td>
<td>Immediate</td>
<td>Events Niche</td>
</tr>
<tr>
<td>Focus on growing the family camping market as a new growth market for the region with dedicated campaigns supported by new products/packages and new itineraries</td>
<td>QPWS, Council, Industry</td>
<td>Medium</td>
<td>Holiday, Niche</td>
</tr>
<tr>
<td>Work with QPWS and Councils to reopen/establish/upgrade key 4WD tracks and trails through the Parks Permit funding</td>
<td>QPWS, Council</td>
<td>Long-term</td>
<td>Holiday</td>
</tr>
<tr>
<td>Package and promote family friendly camping adventures</td>
<td>OQTA</td>
<td>Immediate</td>
<td>VFR, Holiday</td>
</tr>
<tr>
<td>Investigate the potential for niche events (golf, palaeotourism, ironman, technology, etc) to extend the season and introduce new markets to the region</td>
<td>OQTA</td>
<td>Immediate</td>
<td>Niche</td>
</tr>
<tr>
<td>Continue to support and promote existing events with the potential to grow more visitors in addition to local growth</td>
<td>OQTA</td>
<td>Immediate</td>
<td>All</td>
</tr>
<tr>
<td>Support the development of new interactive palaeotourism experiences including virtual and augmented reality</td>
<td>OQTA</td>
<td>Medium</td>
<td>All</td>
</tr>
<tr>
<td>Work with the National Trust to develop and promote ‘stays with a story’ as a unique way to experience the outback</td>
<td>OQTA, National Trust</td>
<td>Medium</td>
<td>All</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Marketing</th>
<th>Partners</th>
<th>Time</th>
<th>Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create an Event operators cluster to support a co-operative approach to marketing and in-region support for operators to become involved in packaging</td>
<td>OQTA, Industry</td>
<td>Immediate</td>
<td>All</td>
</tr>
<tr>
<td>Load events schedule with updated information into distribution channels</td>
<td>OQTA, TEQ</td>
<td>Immediate</td>
<td>Holiday</td>
</tr>
<tr>
<td>Identify local ambassadors in the tourism sector to champion the growth of events and experiences in their region</td>
<td>QTIC</td>
<td>Medium</td>
<td>All</td>
</tr>
<tr>
<td>Continue to evolve the ‘Outback Mates’ program into a self-sustaining marketing platform</td>
<td>OQTA, VICs</td>
<td>Medium</td>
<td>All</td>
</tr>
<tr>
<td>Leverage major events such as World Science Festival to raise awareness of the unique selling points of Outback Queensland as a palaeotourism destination</td>
<td>OQTA, TEQ, Industry</td>
<td>Medium</td>
<td>All</td>
</tr>
</tbody>
</table>
3. Markets

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

**Vision:** Our hero experiences and targeted marketing towards identified key 2020 growth markets will facilitate tourism in the Outback to build peak periods and extend shoulder seasons.

Improve visitation during the shoulder periods:
- Drive business through packaging (combining air/hire car/accommodation/experiences), drive market incentives, events and niche markets.

Maintain and grow existing drive based tourism by:
- Incorporating recommendations from the Drive Strategy
- Establish a Drive Outback Queensland Alliance
- Marketing activity – consumer direct, distribution and PR

Utilise new media technology to reach target markets and provide visitor information.

<table>
<thead>
<tr>
<th>Product</th>
<th>Partners</th>
<th>Time</th>
<th>Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase the trade mentoring program for operators (i.e. contracting</td>
<td>Industry,</td>
<td>Immediate &amp;</td>
<td>All</td>
</tr>
<tr>
<td>with wholesalers) to enable the creation of a series of <strong>fly-drive</strong></td>
<td>Council, OQTA,</td>
<td>Annual</td>
<td></td>
</tr>
<tr>
<td><strong>packages</strong> for the region, leveraging the available accommodation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>and cheap flights (in on Friday and out on Sunday)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Target existing accommodation providers to encourage <strong>renovation of</strong></td>
<td>Industry, OQTA,</td>
<td>Medium</td>
<td>All</td>
</tr>
<tr>
<td><strong>product</strong>, expansion of business acumen and become leaders in</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>changing in region perceptions</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Marketing</th>
<th>Partners</th>
<th>Time</th>
<th>Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continue to target existing drive market through <strong>tradeshow</strong></td>
<td>OQTA, Industry</td>
<td>Immediate</td>
<td>VFR, Holiday</td>
</tr>
<tr>
<td><strong>participation</strong> (consumer direct and travel trade), engage with travel</td>
<td></td>
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<tr>
<td>trade distribution channels and support with a PR plan</td>
<td></td>
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<tr>
<td>Actively pursue marketing of the Outback through the <strong>‘Outback</strong></td>
<td>OQTA, TEQ</td>
<td>Medium</td>
<td>Niche</td>
</tr>
<tr>
<td><strong>Education Subsidy Scheme’</strong></td>
<td></td>
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</tbody>
</table>
4. Partnerships

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

**Vision:** Work as a collective across the entire Outback visitor economy to ensure everyone is promoting the region on-message and in a way that will maximise visitation and spend.

Improve measurement of tourism industry in the Outback for a more accurate reflection of economic benefit to the region through a targeted research program.

Maximize the potential flow-on benefits for tourism from resources sector growth:
- Market directly to resource sector to encourage visitation
- Co-ordinated infrastructure development

<table>
<thead>
<tr>
<th>Product</th>
<th>Partners</th>
<th>Time</th>
<th>Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Produce an annual ‘state of the industry’ barometer to monitor implementation of the DTP, incorporating progress on expenditure targets</td>
<td>Council, OQTA</td>
<td>Annual</td>
<td>All</td>
</tr>
<tr>
<td><strong>Work with regional boards,</strong> which will facilitate agreements on funding and operational approaches to events, development of the dinosaurs experience and drive tourism. This partnership will also develop and agree upon: an annual strategic events plan; priorities for the dinosaur experience and; an outback priority tourism roads list.</td>
<td>Local government, industry, OQTA</td>
<td>Annual</td>
<td>All</td>
</tr>
<tr>
<td><strong>Work with DSITI and regional development boards</strong> on the Bush Telegraph program to deliver region wide research.</td>
<td>OQTA, DSITI</td>
<td>Medium</td>
<td>All</td>
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<table>
<thead>
<tr>
<th>Marketing</th>
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<th>Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Produce a high quality investment prospectus for the Outback region highlighting catalyst projects and more accurate research content (from above project). This will ensure they remain top priorities for Council, State and Federal funding, and to encourage investment attraction</td>
<td>Councils</td>
<td>Medium</td>
<td>All</td>
</tr>
<tr>
<td>Identify leading organisations per region to deliver messages throughout the community to continually educate on tourism benefits and encourage better working communication between regions</td>
<td>OQTA</td>
<td>Immediate</td>
<td>All</td>
</tr>
<tr>
<td>Establish an alliance with ‘Drive Inland Queensland’ to help deliver and market services to the drive market through alignment of the efforts of the touring route steering committees</td>
<td>DIQ, Industry, OQTA</td>
<td>Medium</td>
<td>Niche</td>
</tr>
</tbody>
</table>
5. Quality, Service and Innovation

We will deliver authentic, high quality Queensland experiences, led by career-oriented and passionate professionals and by our operators adopting innovated distribution methods to reach customers.

Vision: To be a leader in great story-telling, both online and using the Outback’s characters as ambassadors to build a following of global ambassadors for the region.

Improve industry domestic and international market readiness:
- An annual experience development mentoring program by TEQ to encourage development of existing and new products to meet the needs of emerging markets

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<th>Time</th>
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<tbody>
<tr>
<td>Create an <strong>in-house Experience Development</strong> program for operators to embrace the Hero Experiences and create their own signature experiences</td>
<td>TEQ, OQTA</td>
<td>Immediate</td>
<td>All</td>
</tr>
<tr>
<td>Work with QTIC to establish and deliver a <strong>skills and training</strong> program which meets long term workforce and business needs, and addressing identified skills gaps</td>
<td>QTIC</td>
<td>Immediate</td>
<td>All</td>
</tr>
<tr>
<td>Implement a <strong>service quality program</strong> to drive profitability, building off a Centre of Excellence program now being localised to other regions and being rolled out across the State</td>
<td>OQTA</td>
<td>Medium</td>
<td>All</td>
</tr>
<tr>
<td>Deliver world-class on ground, fact-to-face and <strong>online visitor services</strong> to promote extended stays and experiences, encourage repeat visitation and build a database of Outback customers. Taking cues from destinations like Tasmania for best practice visitor services.</td>
<td>OQTA</td>
<td>Immediate</td>
<td>All</td>
</tr>
<tr>
<td>Conduct yearly rounds of <strong>social media training</strong> for operators needing support to embrace social media</td>
<td>OQTA, TEQ</td>
<td>Immediate</td>
<td>All</td>
</tr>
</tbody>
</table>

Marketing

<table>
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<th>Market</th>
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</thead>
<tbody>
<tr>
<td>Working within the context of existing resilience planning and activity, get all operators in the region ready to respond with effective social media when a major <strong>crisis / weather event</strong> hits Queensland to get the right message out</td>
<td>OQTA</td>
<td>Medium</td>
</tr>
</tbody>
</table>
6. Investment & Infrastructure

Facilitated through the reduction of unnecessary red tape, investment in well-planned and timely public and private infrastructure, tourism growth and improved visitor access can be enabled.

Vision: Attract new markets through improved access, new product and iconic experiences.

Identify current gaps in the experience offering to provide guidance on future development priorities.

Attract and facilitate ongoing investment in visitor experiences through a co-ordinated approach to infrastructure development and business sustainability including:

- Identified catalyst projects
- Region wide investment and development opportunities

Improve road, rail and air infrastructure and services for access and connectivity between sub-regions within the Outback by leveraging off all the demonstrated opportunities of tourism as a pillar of the economy to ensure government invests in access.

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</thead>
<tbody>
<tr>
<td>Implement recommendations from Drive Strategy to encourage self-touring market and dispersal across the region</td>
<td>Council, OQTA,</td>
<td>Medium</td>
<td>VFR, Holiday</td>
</tr>
<tr>
<td>Forge <strong>stronger Local Government partnerships</strong> through joint project steering committees for those priority projects in the Tourism Opportunity Plan that are not currently progressing through public or private sector investment</td>
<td>Council, OQTA</td>
<td>Medium</td>
<td>All</td>
</tr>
<tr>
<td>Develop an Outback Camping Options Policy adopted by all Local Governments</td>
<td>Councils, OQTA, DTMR</td>
<td>Medium</td>
<td>All</td>
</tr>
<tr>
<td>Prepare a <strong>tourism priority roads infrastructure plan</strong> with economic cost benefit analysis</td>
<td>Councils, OQTA</td>
<td>Medium</td>
<td>All</td>
</tr>
<tr>
<td>Develop <strong>new 4WD touring loops and itineraries</strong> to inspire the next wave of travellers</td>
<td>OQTA, Industry</td>
<td>Medium</td>
<td>All</td>
</tr>
<tr>
<td>Create a new program for reinvestment and promotion of iconic <strong>Outback Pubs</strong> with the department of Environment and Heritage</td>
<td>OQTA, DEHP</td>
<td>Medium</td>
<td>All</td>
</tr>
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<tr>
<td>Create a positive investment environment through proactive tourism planning scheme regulations that enables reinvestment in existing tourism product</td>
<td>Councils, OQTA</td>
<td>Long-term</td>
<td>All</td>
</tr>
<tr>
<td>Review existing in-region signage and plan for improvements to feature hero experiences</td>
<td>OQTA</td>
<td>Immediate</td>
<td>VFR, Holiday</td>
</tr>
</tbody>
</table>