

An aerial photograph of a tropical waterfall and pool. The waterfall cascades over dark, jagged rocks into a deep, clear pool. A person is seen swimming in the pool. The surrounding area is lush with green vegetation and dense forest. The scene is captured from a high angle, providing a comprehensive view of the natural beauty.

2021 TTNQ AGM

21 October 2021

**TOURISM
TROPICAL NORTH
QUEENSLAND**

**TOURISM TROPICAL NORTH QUEENSLAND
ACKNOWLEDGES WE WORK, LIVE AND PLAY ON
ABORIGINAL AND TORRES STRAIT ISLANDER LAND.
WE PAY OUR RESPECTS TO ELDERS PAST,
PRESENT AND FUTURE.**



An aerial photograph of a tropical coastline. The water is a vibrant turquoise, transitioning to a deep blue further out. A long, narrow white sandbar extends from the shore into the water. The shoreline is lined with lush green vegetation and a few small buildings. The sky is a deep blue with scattered white clouds.

TTNQ 2021 AGM

Ken Chapman – Chair's Report

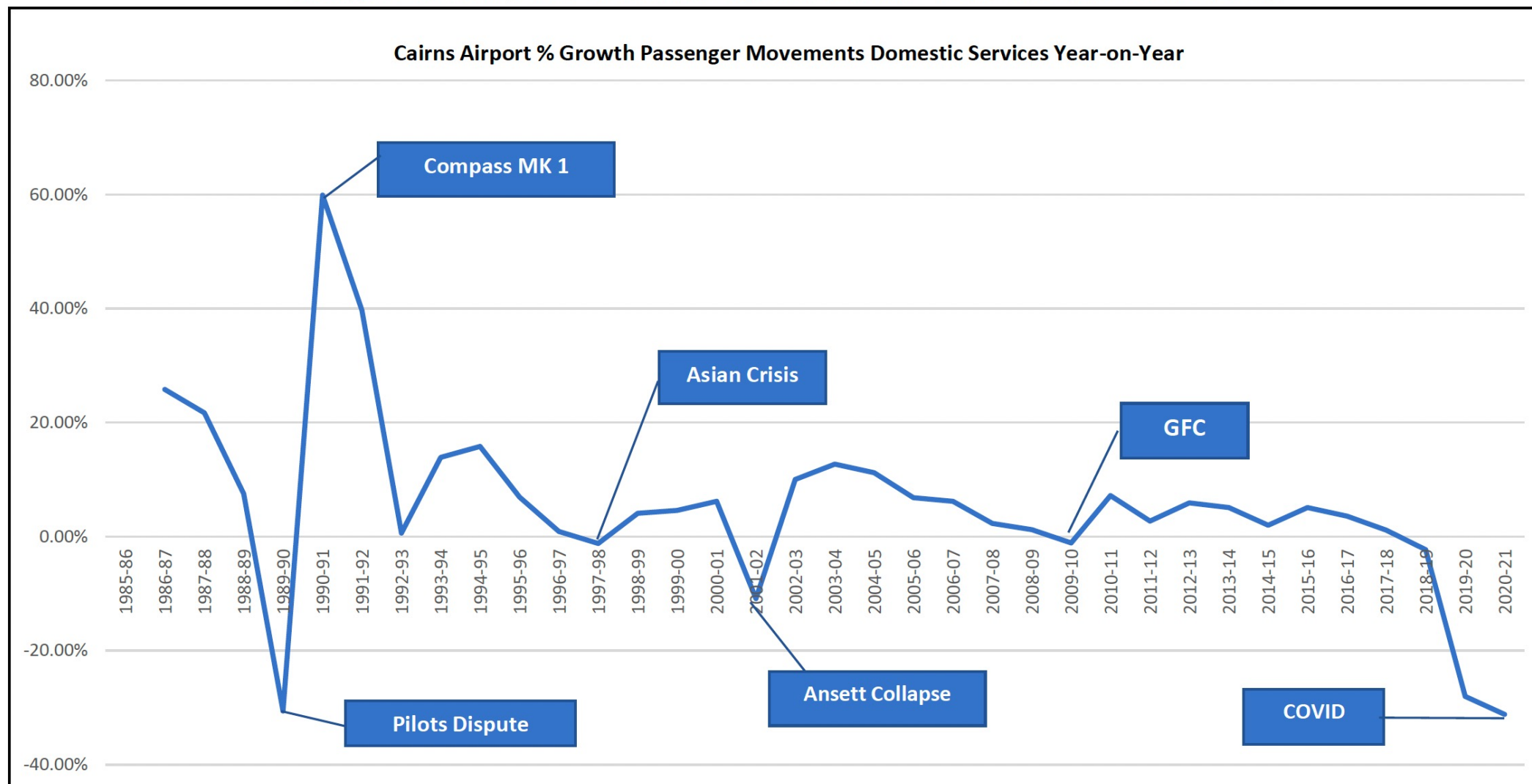
01 July 2020 – 30 June 2021

**TOURISM
TROPICAL NORTH
QUEENSLAND**

COVID THE BIGGEST IMPACT IN OUR REGION'S HISTORY

SIGNIFICANTLY LONGER DURATION THAN THE PILOTS STRIKE

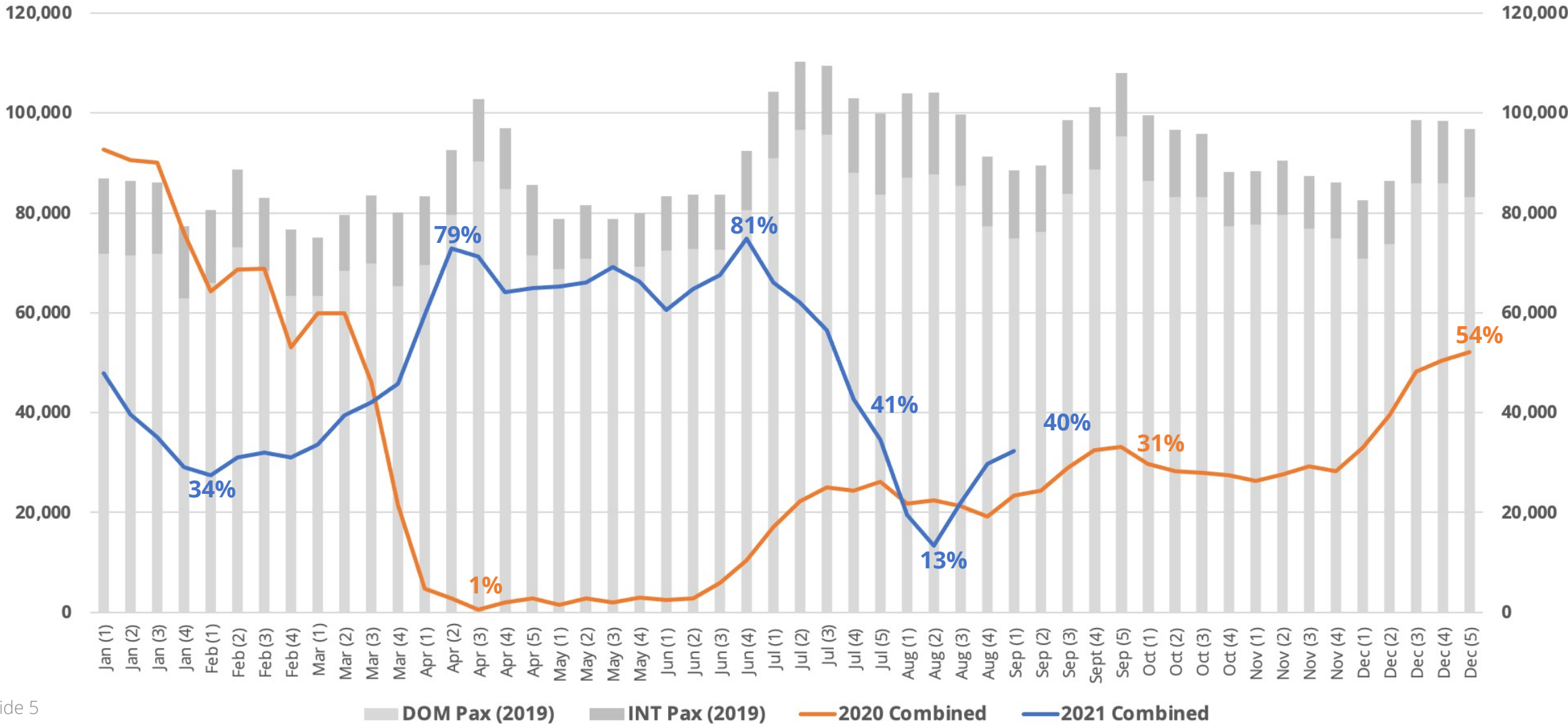
Chart_4b: Cairns Airport % Growth Passenger Movements - Domestic Services Year-on-Year



RECORD DOMESTIC NUMBERS IN MAY & JUNE

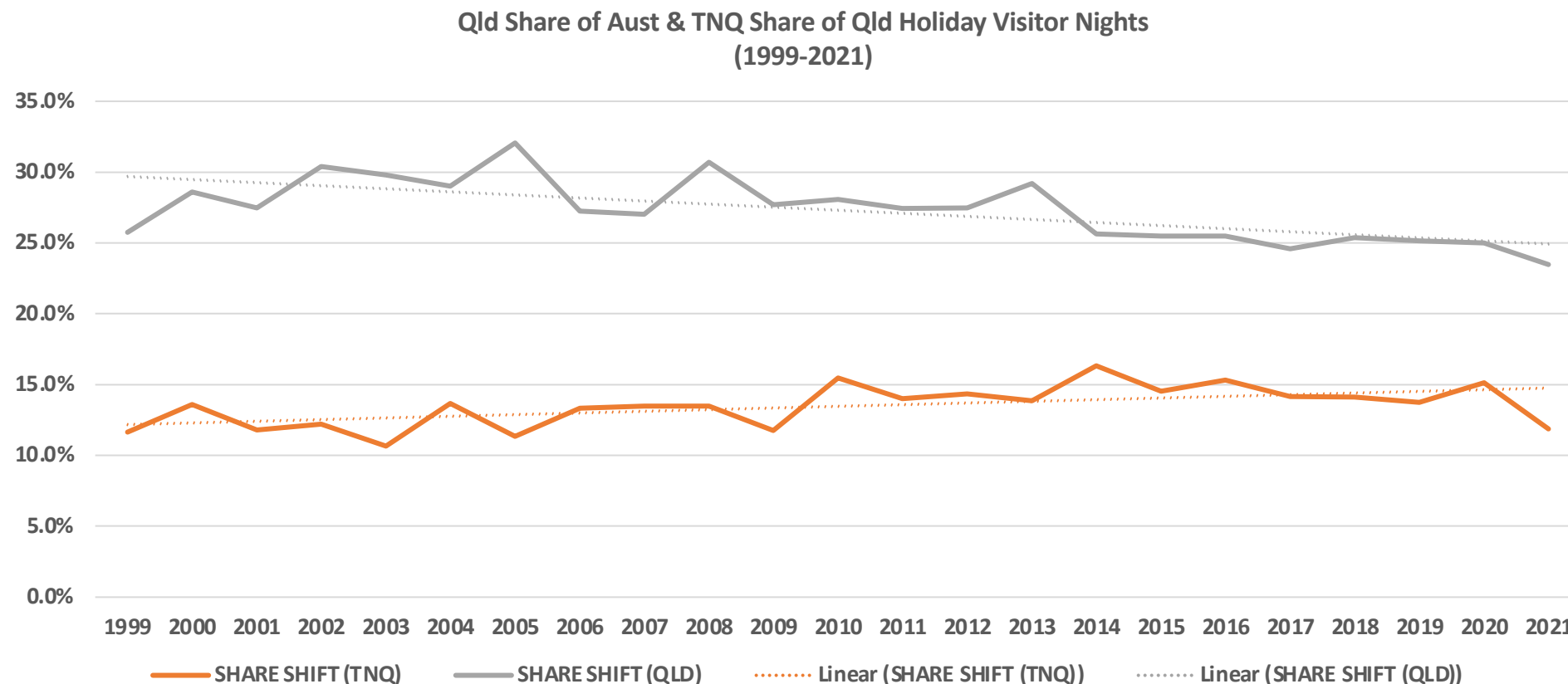
UP FROM JUST 17% IN JULY 2020 TO 81% IN JUNE 2021

Total Cairns Airport Weekly Passengers (2019 - 2021)



SINCE 2019 TNQ'S DOMESTIC SHARE HAS HELD AT 11.9%

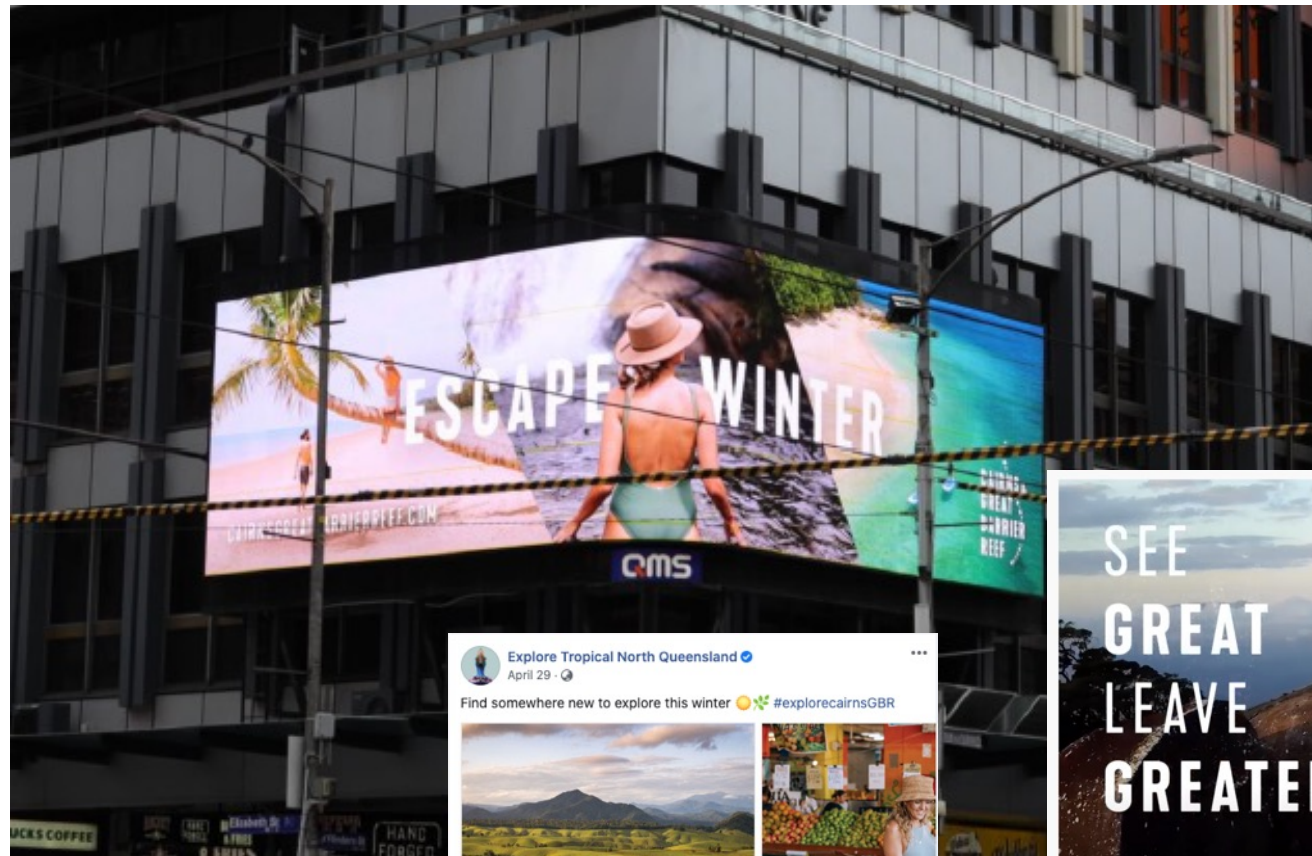
YE MARCH 2020 WAS AT 15.2% THE SECOND HIGHEST YEAR SINCE 2014 PEAK (16.3%)



QLD HAS BEEN LOSING MARKET SHARE SINCE 2010 (28.1%) DOWN TO 23.5% (AVG LOSS OF 2% SHARE / 8.8% ANNUAL DROP)


INTEGRATED WINTER CAMPAIGN

APRIL – JUNE 2021




Explore Tropical North Queensland
April 9 · 🌐

Find somewhere new to explore this winter 🌿 #explorecairnsGBR



Atherton Tablelands

Learn More



Cairns & Northern Beaches

Learn More

Explore Tropical North Queensland
April 9 · 🌐

Winter looks a little different in the tropics 🌴 #explorecairnsGBR




5 NIGHTS OF TROPICAL BLISS \$499 PER PERSON (TWIN SHARE)

NOVOTEL CAIRNS OASIS RESORT

MYQLDHOLIDAY.COM.AU
Cairns & Great Barrier Reef
*Click for T&Cs

Book Now

SEE GREAT LEAVE GREATER



CAIRNSGREATBARRIERREEF.COM

#explorecairnsGBR
Discover tropical winters in Cairns & Great Barrier Reef
Unlisted
6 views · Apr 27, 2021

SHARE SAVE

TOURISM TROPICAL NORTH QUEENSLAND

Hot tropics

Fringed by reef and carpeted with ancient rainforest, there are few places on Earth that can boast the diversity of natural and cultural experiences as Cairns and the Great Barrier Reef.

From the bustling gateway of Cairns, the farmlands and forests of Kuranda, and the lush Atherton Tablelands to laid-back Palm Cove and the glorious Cassowary Coast, Tropical North Queensland is a destination of great contrast and beauty that's ripe for exploration whatever the season. But winter's exceptional weather, calm warm waters and pretty-as-a-picture backdrop of rainforest that is green and buzzing with life mean there are more family-friendly activities than you could ever fit into one escape.



Explore Tropical North Queensland
April 9 · 🌐

Conquer frontier country on your trip to the tip 🌄 #explorecairnsGBR

A TRIP TO THE TIP IS CALLING
EXPLORE GREAT LEAVE GREATER



CAIRNSGREATBARRIERREEF.COM
Discover tropical winters
Cairns & Great Barrier Reef

Learn More

CAIRNS STILL A TOP GOOGLED DESTINATION

#3 BEHIND SYD & MELB FOR AUSTRALIANS PLANNING THEIR HOLIDAYS

● Cairns
City in Australia

● Gold Coast
City in Australia

● Perth
Search term

● Brisbane
City in Australia

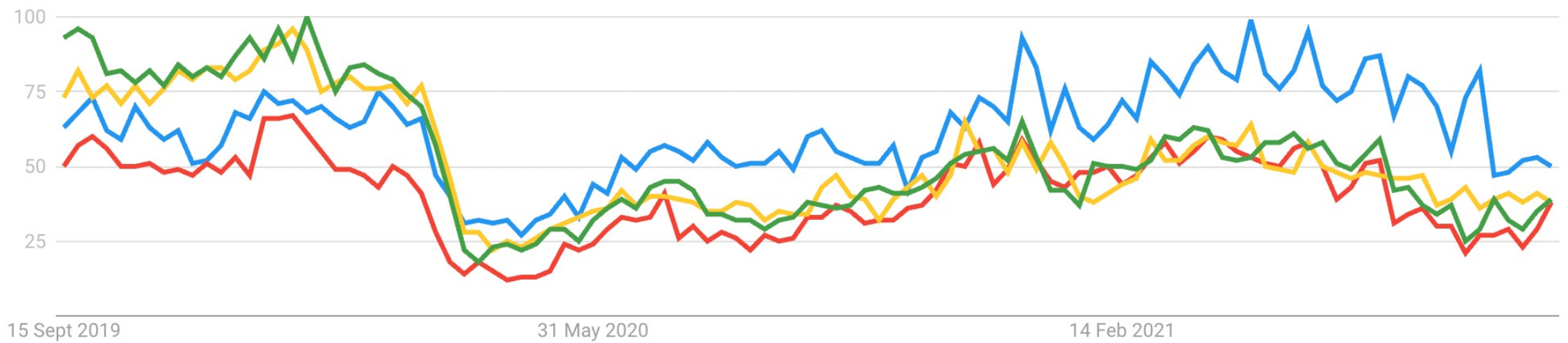
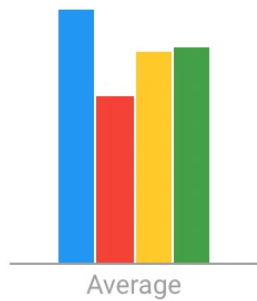
+

Australia ▼

15/09/2019 - 15/09/2021 ▼

Travel ▼

Web Search ▼



ANNUAL REPORT 2020-21

TOURISM
TROPICAL NORTH
QUEENSLAND



GROWING OUR SHARE:

STARTING WITH A FOCUS ON THE DOMESTIC MARKET, INCREASE THE REGION'S AWARENESS TO BOOST OUR SHARE OF QUEENSLAND VISITOR NIGHTS AND SHARE OF VOICE



DRIVING VISITOR SPEND:

DIVERSIFY OUR MIX OF MARKETS AND INCREASE OVERNIGHT VISITOR SPEND GENERATED THROUGH OUR CAMPAIGN ACTIVITY



ENSURING SUSTAINABLE GROWTH:

DRIVE YEAR-ROUND AND DISPERSED VISITATION AND GROW ACCOMMODATION OCCUPANCY AND AVIATION CAPACITY THAT SUPPORTS LOCAL BUSINESSES AND JOBS



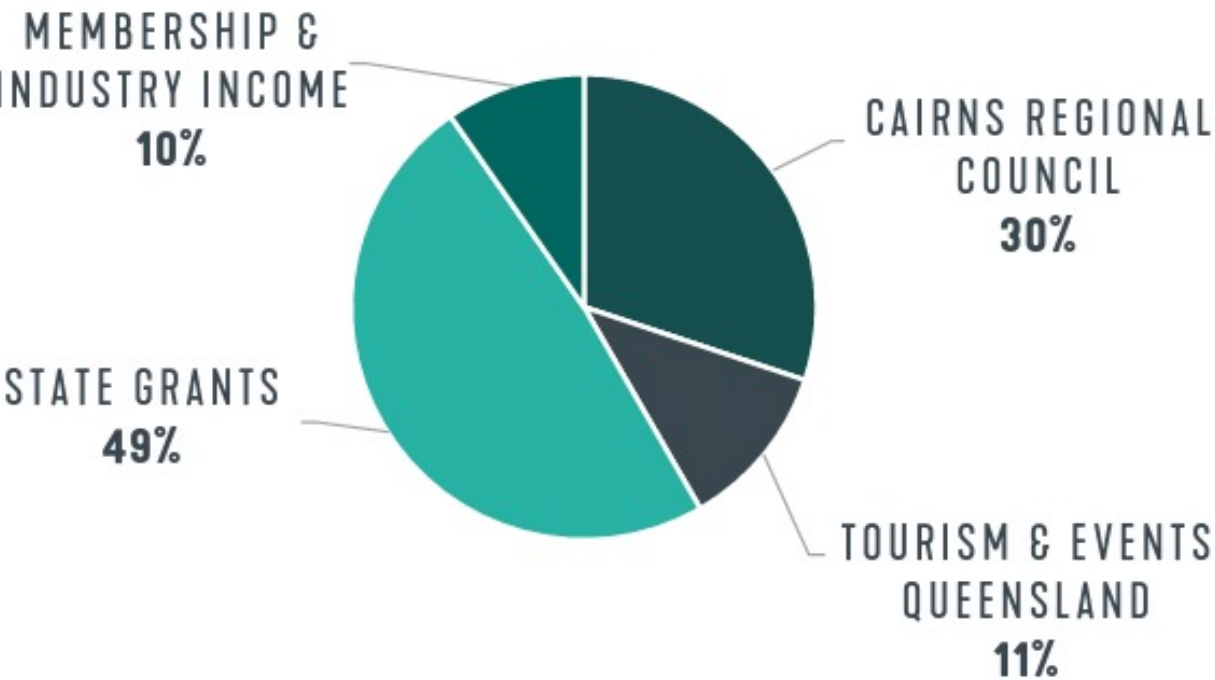
INCREASING SATISFACTION:

BE A RESULTS-DRIVEN AND RESPECTED ORGANISATION THAT IS INCREASING VISITOR, MEMBER, AND COMMUNITY SATISFACTION AND OUR DESTINATION'S NET PROMOTER SCORE

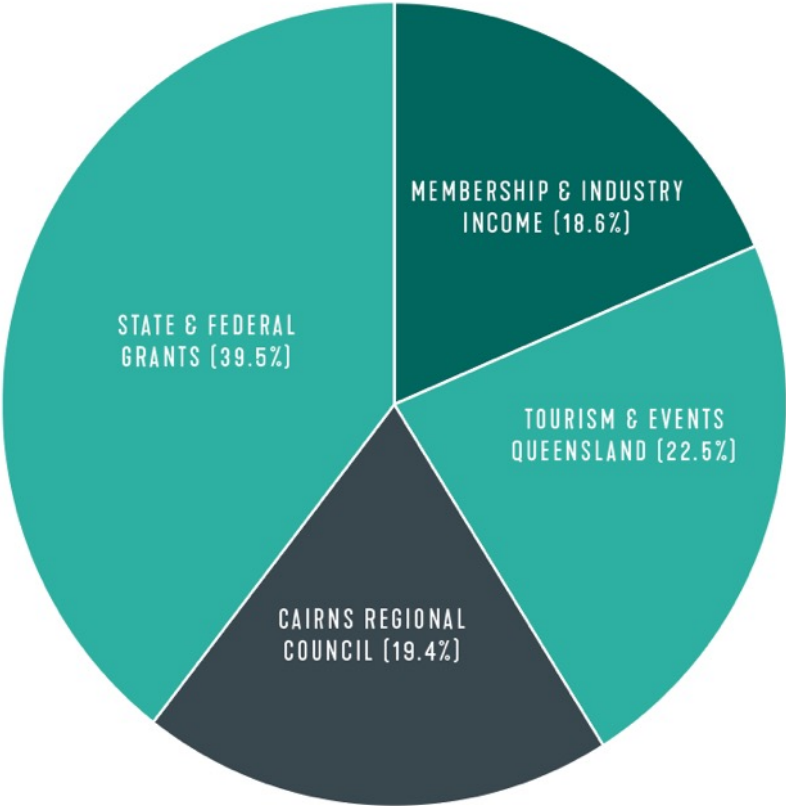
REVENUE BY SOURCE – BOOSTED BY FEDERAL & STATE GRANTS

TEQ FUNDING INCREASE FROM 11% TO 22% FROM HOLIDAY DOLLARS

TTNQ INCOME SOURCES 2019-20



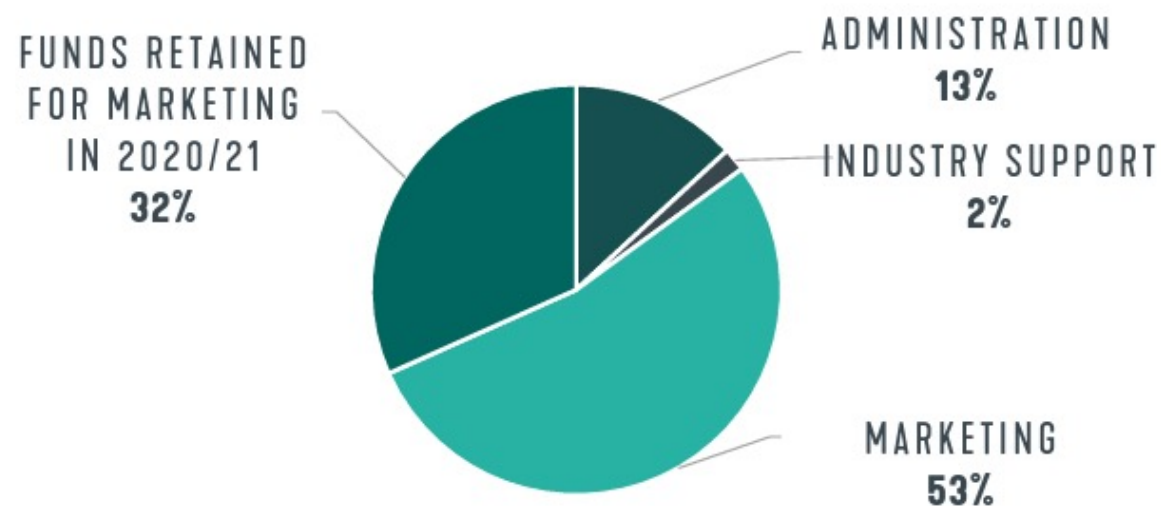
TTNQ INCOME 2020-21



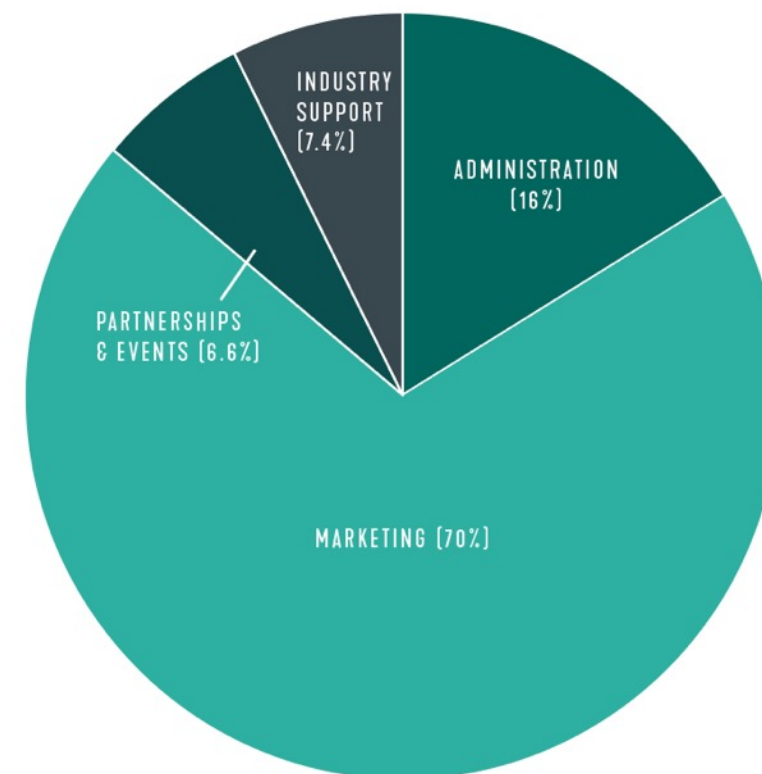
EXPENDITURE FOCUSSED ON MARKETING (70%)

INCREASE IN EVENTS, INDUSTRY SUPPORT & SMALL INCREASE IN ADMINISTRATION

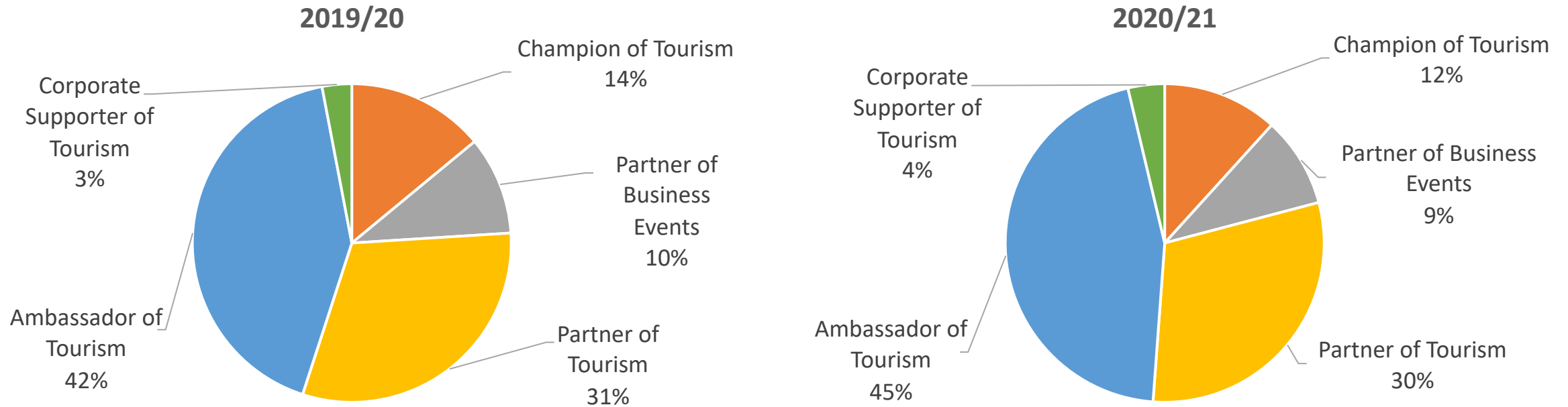
TTNQ EXPENDITURE 2019-20



TTNQ EXPENDITURE 2020-21



No. of Members (2019/20 vs 2020/21)



- **RETAINED MEMBERSHIP** at 466 members (down from 512 at our peak)
- **REVENUE FROM MEMBERSHIP** down due to waiver of 6 months of membership fees
- **COOPERATIVE MARKETING INCOME** up from \$2M to \$2.97M this year



Thank you...

Any questions?

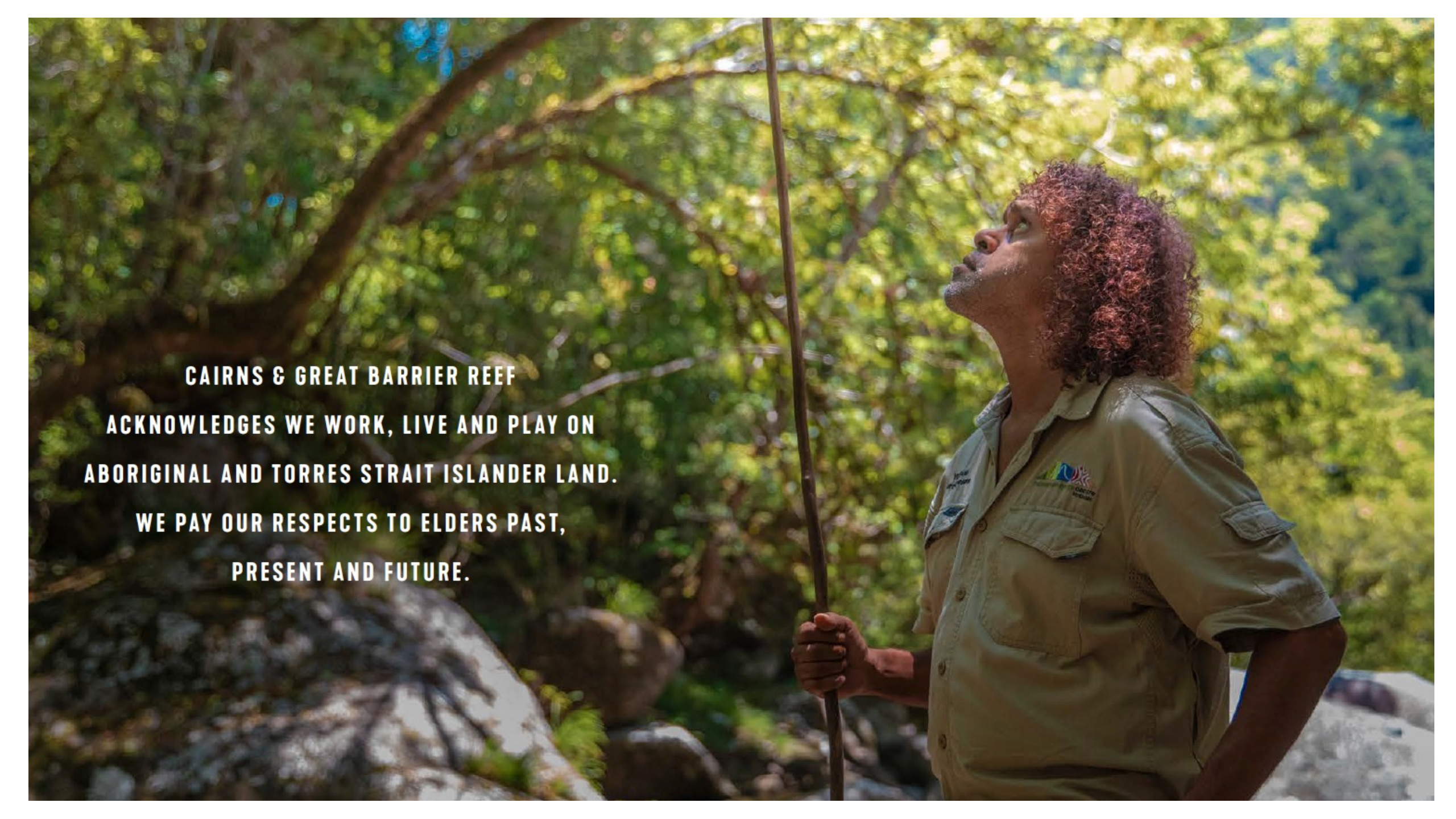


TTNQ 2021 AGM

Mark Olsen - CEO Report

01 July 2020 — 30 June 2021

**TOURISM
TROPICAL NORTH
QUEENSLAND**

A man with curly hair, wearing a khaki shirt, stands in a lush green forest, looking upwards and holding a long wooden staff. The background is filled with dense foliage and sunlight filtering through the trees.

**CAIRNS & GREAT BARRIER REEF
ACKNOWLEDGES WE WORK, LIVE AND PLAY ON
ABORIGINAL AND TORRES STRAIT ISLANDER LAND.
WE PAY OUR RESPECTS TO ELDERS PAST,
PRESENT AND FUTURE.**

YEAR IN REVIEW

SUMMARY OF RESULTS (2020-2021)

Share of Voice :	#1 Destination in Queensland on Google	✓
	AVE of \$147M (\$64M / \$100M)	✓
	Campaign Generated Spend \$113M (\$100M)	✓
Visitor Spend:	Visitor spend held to \$2.3B (\$1.4B forecast)	✓
	Share of Queensland Nights 11.9% (12%)	✓
	Conference Leads & Referrals \$64M (\$30M)	✓
Sustainability:	Dispersal of visitors 54.6% (35%)	✓
	Aviation seat capacity 81% of pre-COVID (80%)	✓
	8 weeks under 6,000 pax in accomm (5 wks)	✗
Satisfaction:	Net Promoter Score 29% (30%)	✓
	Member Satisfaction 87% (80%)	✓
	Coop Marketing Contribution \$2.97M (\$2M)	✓

STRATEGIC DIRECTION DESTINATION KPI'S BY JUNE 2021

Share of Voice

- AVE of on-brand messaging (**\$64M**)
- Member referrals and product sales (**\$35M Retail, \$50M Brand, \$15 Events**)

Spend

- Visitor spend held to **\$2.3B** (forecast as low as \$1.4B)
- Share of Queensland visitor nights **held at 12%**
- Conference leads and referrals (**\$30M**)

Sustainability

- Increase dispersal (**to 35% beyond gateway**)
- Weeks under 6,000 visitor nights in accommodation (**under 5 weeks**)

Satisfaction

- Net Promoter Score increase (**25% to 30%**)
- Member satisfaction (**80%**)
- Industry Coop Contribution (**\$2M**)

ADSHEL

SEE
GREAT
LEAVE
GREATER

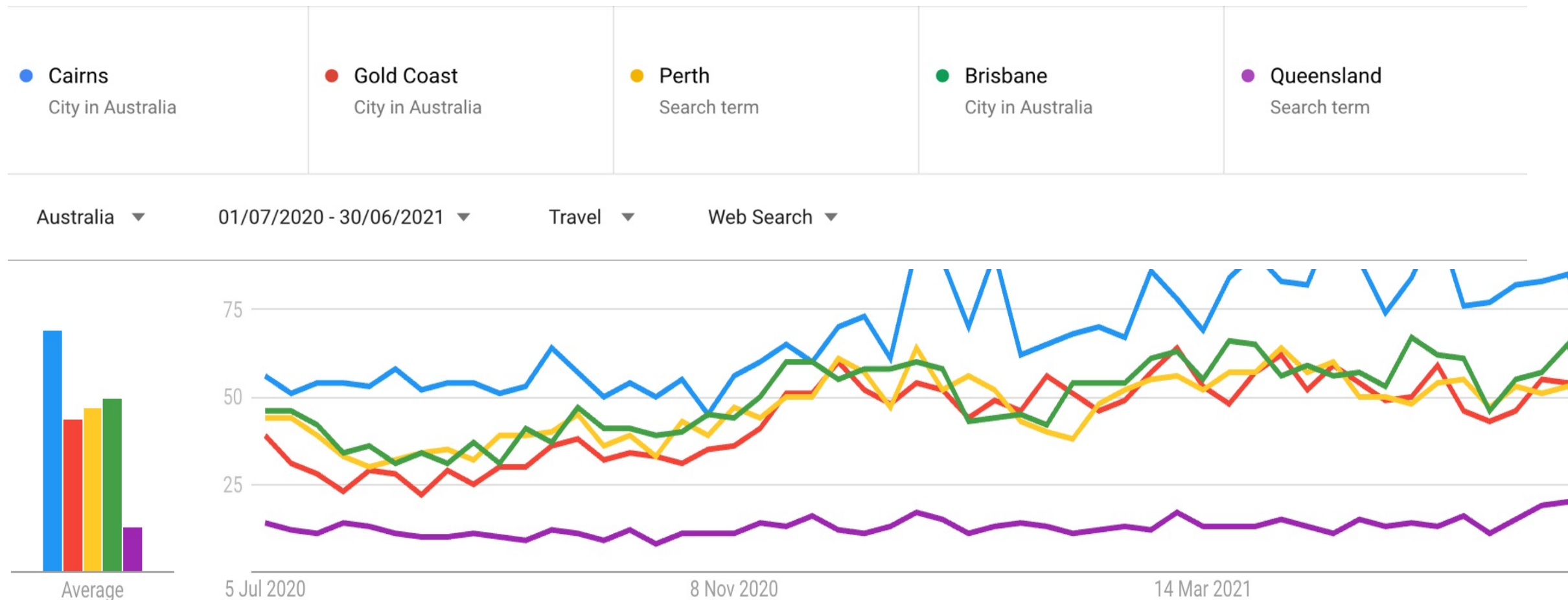
CAIRNS &
GREAT
BARRIER
REEF

ADSHEL



CAIRNS REMAINS QLD'S MOST GOOGLED DESTINATION

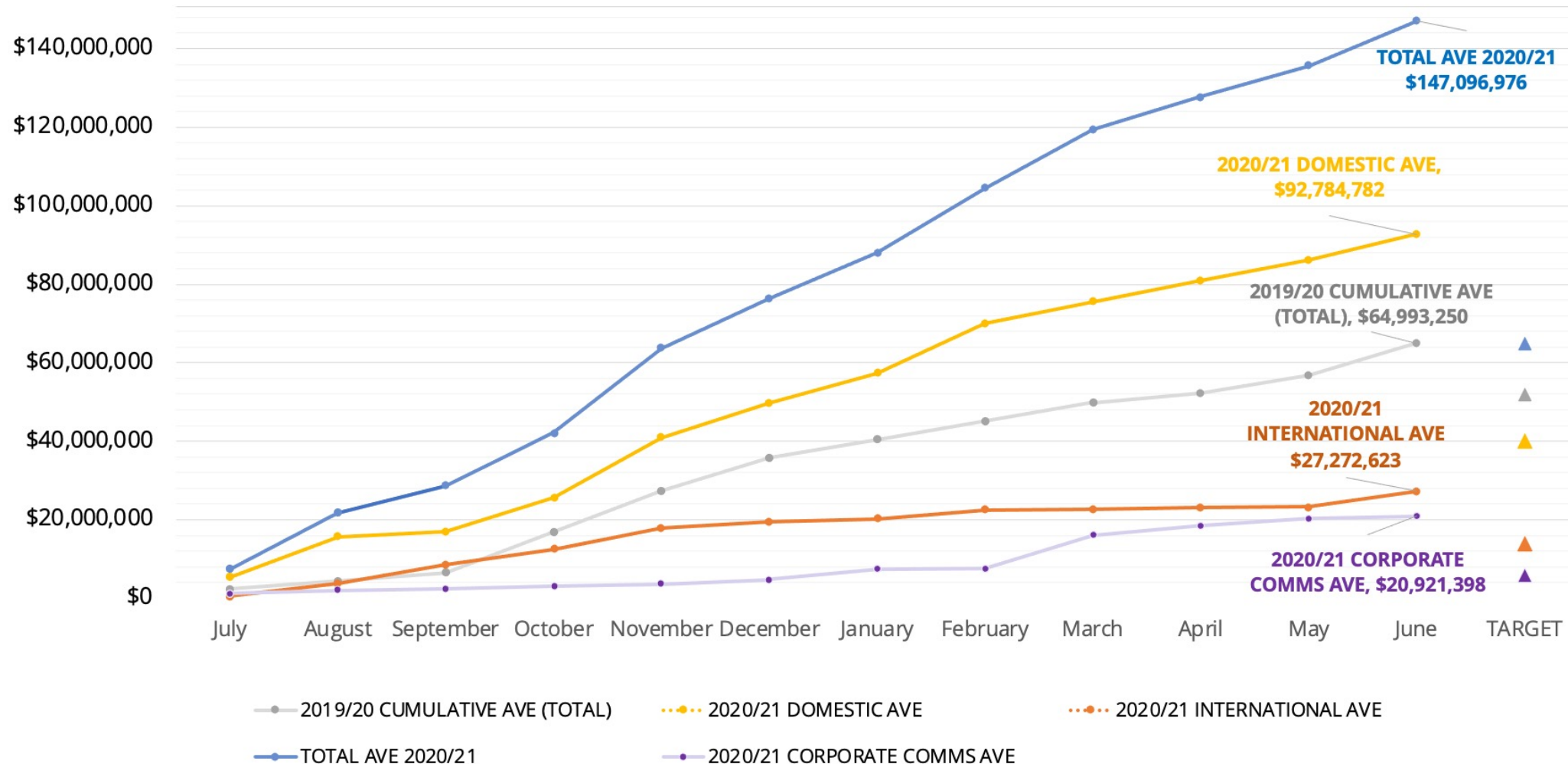
#3 BEHIND SYD & MELB FOR AUSTRALIANS PLANNING THEIR HOLIDAYS



AVE of \$147M, WELL ABOVE THE \$100M TARGET

ALL AREAS OF THE BUSINESS EXCEEDED THE TARGET

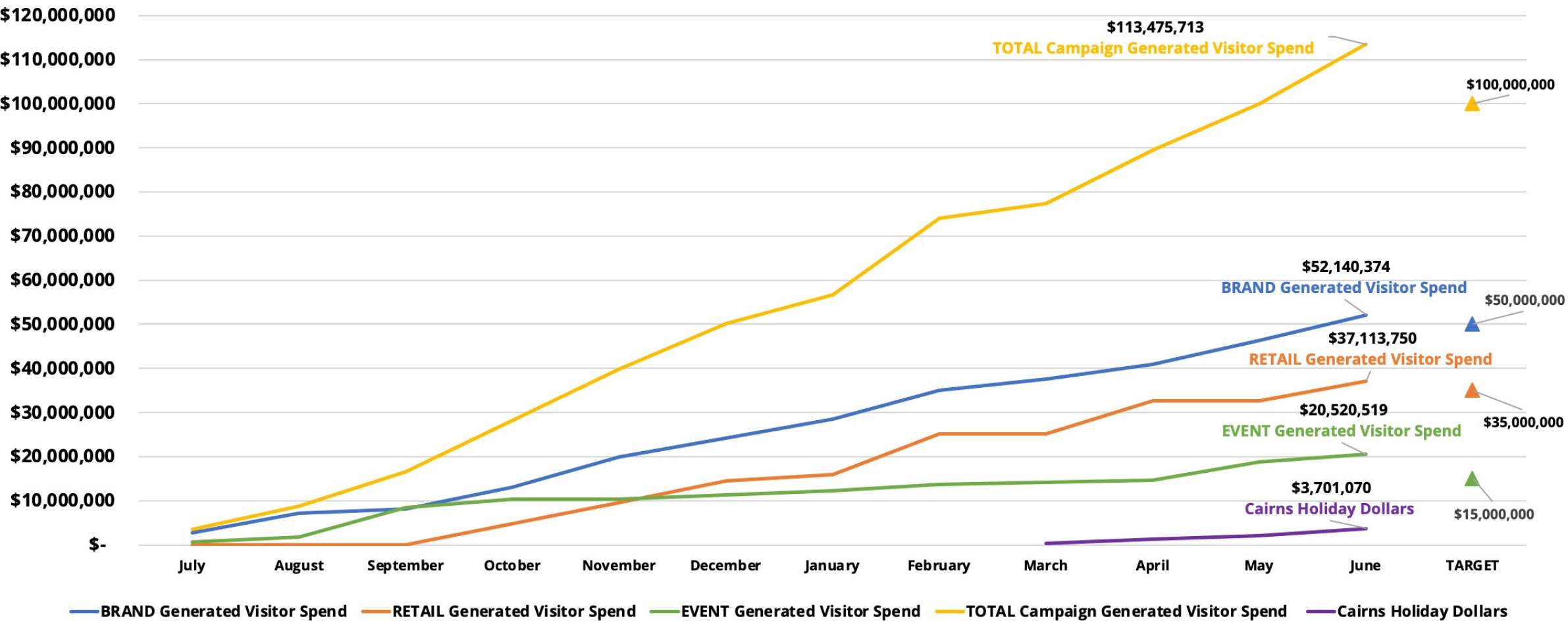
CUMULATIVE AVE RESULTS (2020/21) WITH FORECASTS & TARGETS FROM ALL MEDIA



CAMPAIGN GENERATED SPEND AT \$113M

WELL OVER THE \$100M TARGET, MOSTLY FROM CHDs (\$3.7M) & EVENTS (+\$5M)

Campaign Generated Overnight Visitor Spend (Target \$100M)



SUMMER IN THE TROPICS

DEC-JAN: \$16M MEDIA AND \$21M SPEND

AVE: \$15.6M

- \$4.5M PR
- \$6.3M Paid media value
- \$4.8M Retail media value

OVE: \$20.9M

- \$9.7M Retail OVE
- 20k Retail Pax spending \$505, 5.9 days, lead time 112 days
- \$11.2M Brand campaign referrals (60,000 operator leads)

REACH: 6M

- 15M impressions
- 420k reach from influencers

OWNED CHANNELS:

- IG +65%, FB +8%
- 60k views of landing page (600 per day)
- Best day = 1,500 unique visitors

TOURISM
TROPICAL NORTH
QUEENSLAND



Mumbrella

Giant Cairns snorkeller arrives in Sydney

news.com.au

Stick your head in to Darling Harbour
An 8m high inflatable snorkeller has been dropped into Darling Harbour, where it will stay until Saturday.

PEDESTRIAN

There's A Huge Snorkeller's Head Floating In Darling Harbour RN & Ah, What's Going On There?

Newsport

SNORKELLER PROMOTION WITH A DIFFERENCE IN SYDNEY

Global TRAVEL MEDIA

A Giant Cairns snorkeller goes snorkelling in Sydney

Daily Telegraph

Stick your head in to Darling Harbour
An 8m high inflatable snorkeller has been dropped into Darling Harbour, where it will stay until Saturday.

Cairns Post

WHY A GIANT INFLATABLE IN SYDNEY IS HOPED TO BOOST TWO TOURISM
If Sydney's snappers were wondering where to come a summer holiday this year, they've just discovered a big blue up-inflatable idea.

tw. TRAVEL WEEKLY

GIANT SNORKELLER INVADERS SYDNEY HARBOUR AS PART OF TOURISM TROPICAL NORTH QUEENSLAND'S LATEST CAMPAIGN

SUMMER LIVES ON

FEB – MAR: Strong Retail and Brand

AVE: \$10M

- WOTIF Tourism Town of the Year
- National press coverage (print and TV)
- Strong social media presence

OVE: \$6M

- Expedia, Wotif, and Helloworld
- Virgin Australia & Alliance partnerships

WEBSITE REACH 1M UNIQUE USERS

Intrastate numbers back to pre-COVID levels with BNE back to 76%, Townsville back to 77% and Intraregional back to 89%.

BNE TO CNS THE BUSIEST ROUTE IN AUSTRALIA

Virgin australia
FIND YOUR CITY VIBES SALE

SUMMER LIVES ON
Summer may be officially over, but in the tropics the summer lifestyle doesn't end just yet.
EXPLORE NOW

EXPLORE Tropical North Queensland
Sponsored
Summer lasts a little longer around here & so do fresh tropical fruits 🍌🍍 #explorecairnsGBR

SUMMER LIVES ON
CAIRNS GREAT BARRIER REEF

7 NIGHT LUXURY RETREAT
FROM \$1199
PEPPERS BEACH CLUB PORT DOUGLAS

Explore Tropical North Queensland
Sponsored
Summer lasts a little longer around here & so do fresh tropical fruits 🍌🍍 #explorecairnsGBR

SUMMER LIVES ON
CAIRNS GREAT BARRIER REEF

SUMMER LIVES ON
CAIRNS GREAT BARRIER REEF

SPECIAL REPORT
The best time for
THE BEST PLACE ON EARTH

SUMMER LIVES ON
Summer may be officially over, but in the tropics the summer lifestyle doesn't end just yet.
FIND HOLIDAY DEALS & EXPLORE MORE AT CAIRNSGREATBARRIERREEF.COM

4 NIGHT TROPICAL ESCAPE
CAIRNS PLAZA HOTEL & CITY SIGHTS TOUR
FROM \$299 PER PERSON
1300 TRAVEL | vivaholidays.com.au

7 NIGHTS + \$750 BONUS VALUE
FROM \$599 PP TWIN SHARE
SUMMER LIVES ON

ESCAPE WINTER TO THE TROPICS

APR – JUN: BIGGEST CAMPAIGN PUSH

AVE: \$18M

- National print, TV, digital and PR push
- Breakfast TV weather and crosses
- Huge social and digital presence
- Today Show, Sydney Morning Herald

OVE \$26M

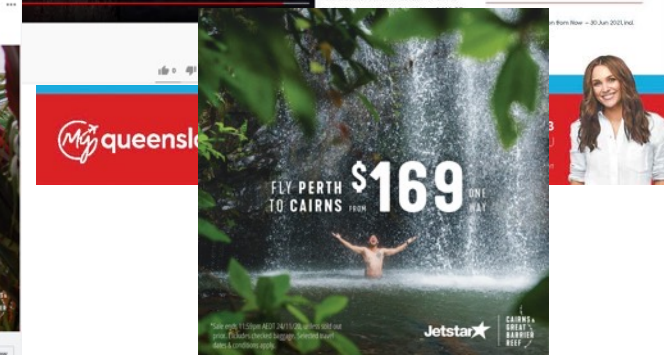
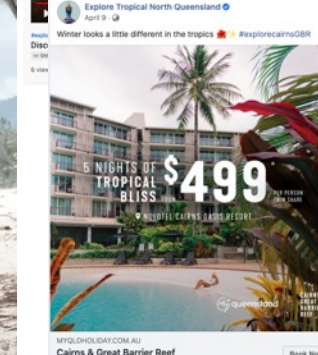
- Airline partnerships VA, QF and JQ
- Retail partnerships with My Qld and Expedia

Leads to Operators:

- over 230,000 leads generated in 2020/21

RECORD DOMESTIC VISITOR NUMBERS

- PRIOR TO THE LOCKDOWNS



DRIVE NORTH QUEENSLAND

YEAR ROUND ACTIVITY – REACHING 2M AUSTRALIANS

TOURISM
TROPICAL NORTH
QUEENSLAND

Reach: reached 2M+ generating 21,875 leads

How: Social, owned channels development (web/social), trade shows (Caravan & Camping), print (DNQ map) and SEM

PARTNERSHIP WITH OUTBACK, TSV, WHITSUNDAYS, & MACKAY

drivenorthqueensland.com

Sessions: 24,279

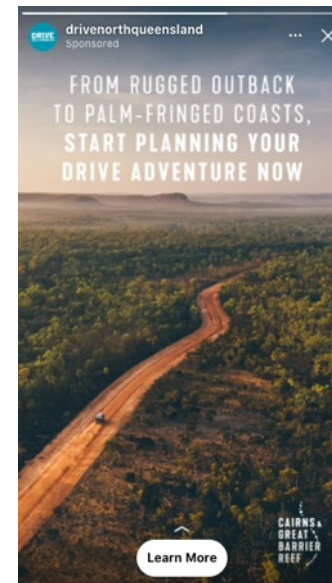
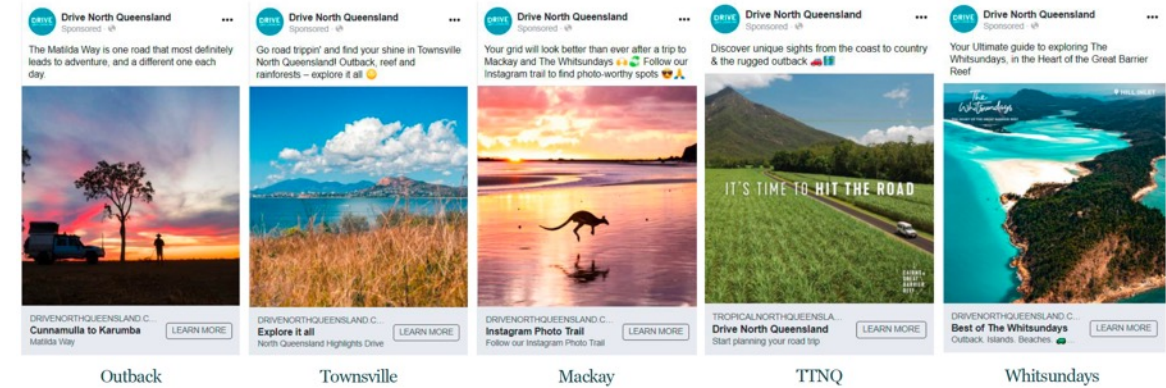
Sessions per user: 1.12

Page views: 28,506

Operator Referrals: 72%

Av time on page: 2:12

RECORD NUMBERS TO THE CAPE AND GULF IN 2020/21



AD HOC CAMPAIGNS

CAIRNS HOLIDAY DOLLARS: Delivered \$2.4M in direct bookings and 5,702 additional trips in our region

WORK IN PARADISE: nearly half of all the 1,700 jobs taken up were in our region

ECO-LUXURY: \$5M in AVE and leads to industry from this campaign focussed on international-style holidays at home

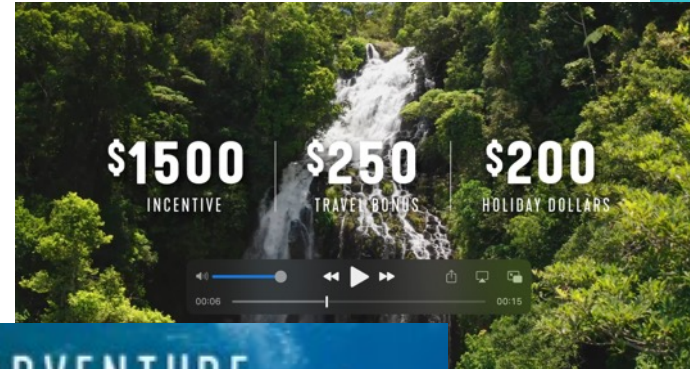
ADVENTURE: strong social and digital campaign backed by influencers to regain our position as Australia's Adventure capital

GBR EDUCATION SUBSIDY: support from the State Govt for Queensland schools and from the Federal Govt for operators to continue reef monitoring



TOURISM
TROPICAL NORTH
QUEENSLAND

The Saturday
Telegraph
Careers



CAPE YORK

SEEK GREAT
LEAVE GREATER

CAIRNSGREATBARRIERREEF.COM

CAIRNS &
GREAT
BARRIER
REEF

APN



Any General Business?

Thank you
