




ANNUAL REPORT 2020-21

TOURISM
TROPICAL NORTH
QUEENSLAND

A group of people are gathered around a campfire at night. The fire is bright and glowing, casting a warm light on the scene. The people are sitting on the ground, some looking at the fire and others looking towards the camera. The background is dark with silhouettes of trees and a starry night sky. The text is centered in the upper half of the image.

**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.**

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CHAIR'S REPORT

As I write this, with most of the country and the rest of the world locked out from travelling to our region and after 18 months of the worst trading conditions for tourism businesses in history, I am amazed and immensely heartened by the resilience and enduring spirit of our members and team members throughout this COVID-19 disaster.

For Tourism Tropical North Queensland (TTNQ) it really has been a case of doubling down on what we do in support of our community. We have ramped up our advocacy and lobbied as never before for government support for tourism businesses and their staff and for marketing funds and incentivisation programs to drive visitation from the markets that are open to us. Seizing opportunity from adversity we have received unprecedented funding support from the Federal Government and strong support from the State and Cairns Regional Council which has allowed Mark Olsen and his team to put together the most comprehensive integrated consumer marketing campaigns we have ever had.

But there is no point marketing to people who can't travel and that has been the saga of the past year. Great campaigns ready to go and then pulled at the last minute due to yet another lockdown or border closure. Where we have had clear air we have achieved good results. This region has become the most Googled destination in the country after Sydney and Melbourne, way ahead of the Gold Coast, Whitsundays and Queensland as a whole. And we have achieved record domestic visitation in the few weeks without travel restrictions.

The TTNQ team have put in an extraordinary effort to help our industry get through this; truly a case of when the going gets tough, the tough get going. On behalf of the Board, our members and whole community, I would like to thank them for their efforts and dedication on our behalf.

I would also like to thank my fellow directors and committee members who are all busy professionals giving their time voluntarily to help guide us through difficult times. Particular thanks and recognition go to departing Chair Wendy Morris who worked tirelessly to build the organisation up for the future, leaving it in great shape to manage the times we find ourselves in.

It is of course always darkest before the dawn and with vaccination rates now climbing rapidly, there can be confidence that we will finally be on the path to recovery in 2022. It is a very deep hole we have to climb out of but I am confident that we can all pull together and come back stronger.

We will need ongoing funding support for destination marketing from all levels of Government and partnership support from suppliers, agents and airlines. This will allow us to promote Cairns & Great Barrier Reef like never before and use this as an opportunity to reposition the destination as the most desired in the country.

We have to win back our flight connections and we have to rebuild our relationships with the travel trade around the world. A big task but we have done it before and we know how to work together and get the job done.

The job of TTNQ has never been more important to our community. I thank our members, sponsors and supporters for sticking with us and urge you all to work with us even more closely as we rebuild our markets and get the region back to where it should be and even better than before.



Ken Chapman
Appointed Director – Chair



CEO'S REPORT

The 2020-21 financial year was a continuation of the COVID-19 roller coaster ride for our industry, with our destination locked out of key markets for most of the year. We had no international visitation wiping \$1 billion in tourism revenue while the State's borders were closed to Melbourne for 293 days, Sydney for 200 days and Brisbane for 25 days.

Tourism Tropical North Queensland (TTNQ) has taken a leading role in fighting for the region's recovery through COVID-19 with a strong focus on industry advocacy, digital marketing, publicity, member engagement and targeted campaign activity.

TTNQ secured more than \$40 million in one-off marketing, event and operators support including \$10 million from the Federal Government's Recovery for Regional Tourism Program. This gave a budget of \$13.5 million in 2020-21 with the additional funding from the Queensland Government and Cairns Regional Council. With a larger marketing budget of \$8.8 million for the year we were able to achieve record Advertising Value Equivalent (AVE) of \$147 million with domestic campaigns in every channel reaching millions of people.

Our first domestic summer campaign was launched and included a giant inflatable snorkeller in Darling Harbour, Sydney to attract media attention. This has been our most innovative and integrated campaign to date.

Drive North Queensland continued to tap into the very important drive market including the long-haul market by partnering with other Regional Tourism Organisations (RTOs). Cairns Holiday Dollars was launched in partnership with Tourism and Events Queensland to drive awareness of experiences and increase tour bookings, with participating operators hailing it a success.

The result was that Cairns became the most Googled regional destination in Australia and third in Australia for Australians planning holidays. Website referrals to operators were at a record level with 227,000 leads from the destination website.

Business Events was showing strong growth for the region with more than \$64.4 million worth of leads and referrals for the financial year and \$10 million in secured events.

The Work in Paradise campaign was announced in May to address staff shortages and help fill the gap in share accommodation. This offered cash incentives to workers and included a dedicated website to assist them to find a job and accommodation.

With the announcement of a New Zealand travel bubble we immediately started with focus group research in-market to identify key challenges and opportunities and kicked off our publicity push before the borders closed again.

As an organisation we looked at our structure to adapt to the loss of our international markets and increased focus on advocacy.

The organisation added to our small team of 17 people; Manager – Corporate Services, Marketing Coordinator – Campaigns & Content and Project Assistant, to support the roll-out of our grant funding programs. I thank the team for their dedication to the tourism industry in this changing marketing landscape.

Thank you to Wendy Morris, whose three-year term as Chair ended at the 2020 Annual General Meeting, for being a passionate advocate for Cairns & Great Barrier Reef. I also thank Norris Carter, Craig Pocock, Sheena Walshaw, Todd Parker, Jeff Schrale and Peter Woodward for their insights and advice during their time on the Board.

With our Chair Ken Chapman and the Board, TTNQ will continue charting the path to recovery for our industry to become the most visited nature-based and ecotourism destination in Australia.



Mark Olsen
Chief Executive Officer



DESTINATION UPDATE

OUR GOAL

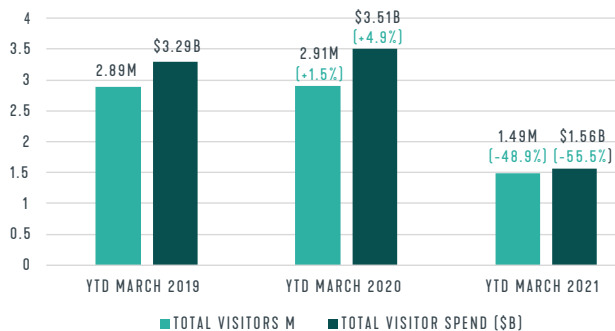
TO BE AUSTRALIA'S MOST VISITED NATURE-BASED AND ECOTOURISM DESTINATION.



With no international visitation and lockdowns impacting our key markets, total visitor expenditure in Tropical North Queensland in 2020-21 fell 55.5% to \$1.9 billion and the number of visitors to 1.5 million, down 48.9% (Tourism Research Australia, YE March 2021).

We entered the financial year with an average of 5,500 visitors a day instead of the 55,000 we had enjoyed pre-COVID and 70% of businesses closed. Seat capacity at Cairns Airport had reached just 30% of pre-COVID levels and the region had just endured the largest reduction of school holiday numbers in the state with visitors down by 97% in June. Our slow path to recovery started with more than half of our target markets (30% international, 20% Victoria) unable to travel to the region.

TOTAL TNQ DOMESTIC VISITORS & VISITOR SPEND YTD MARCH 2021



COMPARED TO 2019-20:

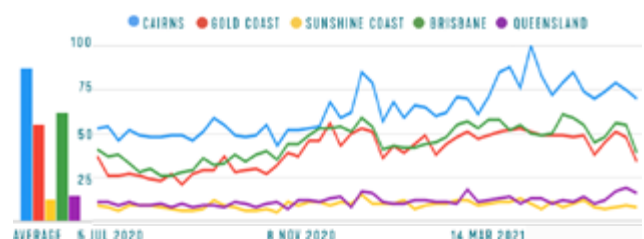
- Total visitor numbers were down 48.9% per annum (3 year average -15.3%), below the State average of -37.5% (3 year average -9.5%).
- Total visitor nights were down 58.2% per annum (3 year average of -15.8%), above the State average of -53.5.5% (3 year average -16%).
- Total visitor expenditure was down 55.5% per annum (3 year average of -50.6%), well below the State average of -37.5% (3 year average -13.4%).

Our first visitors from Sydney (since COVID-19 lockdowns) arrived at Cairns Airport on 10 July 2020 to a very warm welcome earning our destination national media coverage. However before the end of the month the Queensland border closed to Greater Sydney and then all of New South Wales was locked out. By September we faced border closures with New South Wales, Victoria, Western Australia, Tasmania and the Australian Capital Territory, significantly impacting our ability to promote the destination.

Visitor numbers grew towards the end of 2020 as restrictions eased for Greater Sydney and Victoria, however, the Brisbane lockdown in January created a slow start to 2021. Additional aviation seat capacity was secured from January and in March half-price airfares were announced by the Federal Government (TANS). Visitor numbers grew again as restrictions eased for Greater Sydney in February with a dip early April when Brisbane went into lockdown before a very strong Easter.

Interstate visitation grew to 41% from 39% in May with Melbourne a key market that month. Melbourne, Sydney and Brisbane lockdowns began to reduce visitor numbers in June but the number of nights had grown as the caravan parks filled with long-term visitors escaping the cold.

GOOGLE SEARCH TRENDS



TTNQ UPDATE

OUR MISSION

REGAIN LOST MARKET SHARE AND VISITOR SPEND THROUGH INNOVATIVE MARKETING, A UNIFIED BRAND AND EFFICIENT USE OF RESOURCES.



There were several changes to the TTNQ Board, including Chair Wendy Morris completing her three-year term and Ken Chapman appointed Chair. Deputy Chair Norris Carter resigned (moving to Hobart) and Wayne Reynolds was appointed to the role. Directors Craig Pocock, Sheena Walshaw, Todd Parker, Jeff Schrale, and Peter Woodward ended their terms at the AGM, with Janet Hamilton, Tara Bennett, Jeff Gillies, Joel Gordon and Craig Bradbery elected. John O'Sullivan and Richard Barker were new appointed Directors bringing the Board to 12 members once again.

During this tumultuous 12 months TTNQ maintained a very strong focus on industry advocacy to help our members recover from the impact of the pandemic and was active in seeking additional funding to grow our share of voice which was seen as the key to recovery.

KEY HIGHLIGHTS FOR 2020-21 INCLUDE:

- Securing more than \$40 million in one-off marketing, event and operator support funding, including:
 - \$10 million Federal Recovery for Regional Tourism Program grant funding
 - \$3 million Cairns Holiday Dollars Program
 - \$15 million for Queensland's aviation recovery support fund and the Federal Governments half-price fares, Tourism & Aviation Network Support (TANS) Program
 - \$7.5 million Work in Paradise campaign
 - \$1 million Great Barrier Reef education subsidy
- A record \$147 million in visitor and corporate publicity, as the voice for local industry.
- The destination website hit one million unique users.
- Generating \$113 million in direct sales to the industry through retail campaigns and 227,000 referrals (double the previous year) from the destination website.
- Cairns was named the Wotif Aussie Town of the Year earning \$4.5 million in publicity.
- TNQ and Cairns Airport developed a suite of Tropical North Queensland-themed COVID-safe signage for the industry to download free of charge.
- TTNQ's leadership during COVID-19 and commitment to sustainable tourism earned the Wet Tropics Management Authority (WTMA) Chair's Award at the Cassowary Awards.

AS AN ORGANISATION IN THE VISITOR ECONOMY TTNQ CAN INFLUENCE:



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



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



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



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

A man and a woman are standing on a wooden balcony or deck, looking up and smiling. The balcony is made of dark wood and has a metal railing. The background is a dense, lush green jungle with many trees and foliage. The text "KEY HIGHLIGHTS" is overlaid in large, white, bold letters across the middle of the image.

KEY HIGHLIGHTS

SHARE OF VOICE



A RECORD YEAR FOR GENERATING PUBLICITY AND AWARENESS OF OUR REGION,
REMAINING THE MOST GOOGLED REGION IN QUEENSLAND AND #3 IN AUSTRALIA.

TTNQ generated a record \$147 million worth of publicity for the region and more than twice the website traffic of the previous year with one million unique users. Cairns continues to be the third most Googled travel destination in Australia after Sydney and Melbourne (Source: Google Trends, 2021).

G #1 DESTINATION IN
QUEENSLAND ON GOOGLE

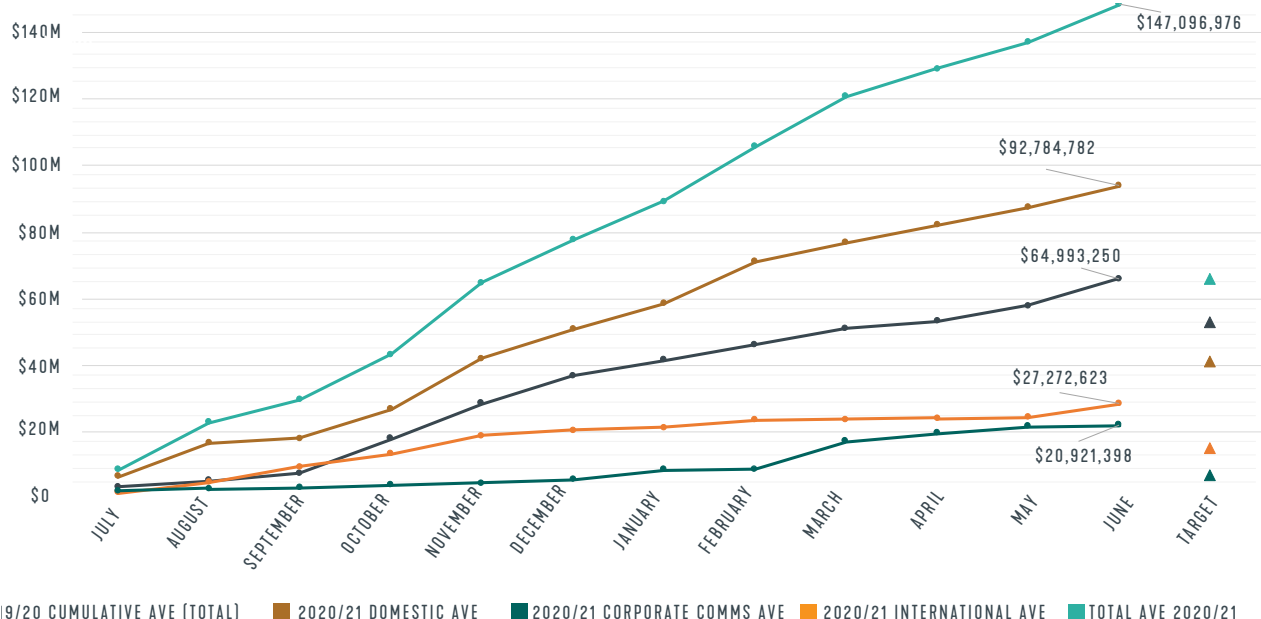
\$ CAMPAIGN GENERATED
SPEND \$113 MILLION
(TARGET \$100 MILLION)

AVE OF \$147M
(TARGET \$100 MILLION)

KEY HIGHLIGHTS FOR 2020-21 INCLUDE:

- The annual total Advertising Value Equivalent (AVE) target (\$64 million) has been exceeded, as has the stretch target of \$100 million, with total AVE reaching \$147 million, and in doing so more than doubled the 2019-20 AVE of \$65 million.
- Domestic trade and media engagement, worth \$93 million AVE, represented the largest annual change being \$67 million AVE above that of the 2019-20 year.
- Digital channel engagement grew strongly with website traffic up 71% year on year and social channel AVE up 54% on 2019-20. May was a record month, with Instagram posts generating record results and the number of referrals from our website to member sites reaching a record high of 34,000.
- Brand marketing contributed \$9.5 million AVE during the months of May and June. June also saw a significant boost in tactical/partner activities, totalling \$2.5 million predominantly due to My Queensland and Abercrombie & Kent.
- The 2020-21 Corporate Communications AVE of \$21 million was 80% more than the previous year due to strong TTNQ media engagement and advocacy.
- International trade and media engagement rose significantly during May and June, with a \$3.6 million trade engagement push in New Zealand including engagement with Aussie Specialists. The resulting annual AVE of \$27 million is in line with 2019-20 results and exceeds the annual target of \$14 million AVE.

TTNQ DELIVERED \$147 MILLION IN MEDIA VALUE IN 2020-21



VISITOR SPEND



TOTAL VISITOR SPEND DROPPED TO \$1.9 BILLION, A BETTER RESULT THAN PREDICTED BY DELOITTE ACCESS ECONOMICS (\$1.4 BILLION) DRIVEN IN PART BY STRONG SUMMER AND EASTER HOLIDAYS.

✓ VISITOR SPEND HELD TO
\$1.9 BILLION
[\$1.4 BILLION FORECAST]

✗ SHARE OF QUEENSLAND NIGHTS
10.6% (DOWN FROM 11.2%)

✓ **\$64 MILLION** CONFERENCE
LEADS & REFERRALS
(TARGET \$30 MILLION)

The region had its visitor spend cut in half, with our industry spending much of 2020-21 in survival mode. Peaks in the summer holidays and post Easter were outweighed by the impacts of the international and state lockdowns.

KEY HIGHLIGHTS FOR 2020-21:

- Campaigns generated more than \$113 million direct visitor spend including \$37 million from retail campaigns and more than \$50 million in direct bookings from campaigns.
- \$3 million Cairns Holiday Dollars program launched by the Queensland Premier, generating nearly \$5 million in publicity value in the first 48 hours.
- Drive North Queensland campaign with RTO and LTO partners to increase drive visitation further north, with record numbers of drive visitors in 2021.
- Summer Great campaign to position Cairns & Great Barrier Reef as a desirable summer destination, uncover why it's a special time to visit, and shift perception of domestic travellers that it's too hot, wet and dangerous over this period. This extended into Autumn with the Summer Lives On campaign.
- Targeted niche market activities for those impacted sectors and markets that typically travel overseas including 'Adventure Great' over summer and 'Nurture Great' targeting the eco-luxury market.
- Escape Winter campaign to capture new audiences and increase experience bookings while growing our share of voice to increase visitor spend.
- Supporting new aviation routes from Darwin, Perth, Adelaide, Canberra, Sunshine Coast and Newcastle through dedicated campaigns with airline partners.
- Work in Paradise campaign launch in May to drive national audience to relocate for work in the tropics with incentives and help bridge the staffing gap in the TNQ tourism industry.

NATIONAL VISITOR SURVEY YEAR END MARCH 2021

	EXPENDITURE	\$1.6B	-39.3%
	VISITORS	1.5M	-31.9%
	VISITOR NIGHTS	\$7.3M	-34.2%

	SPEND PER NIGHT	\$214	-7.8%
	AVERAGE LENGTH OF STAY	4.9 NIGHTS	+4.08%

DOMESTIC MARKETING

Ongoing lockdowns and border closures resulted in a 39% decline in domestic expenditure to \$1.56 billion and a 32% fall in visitation to 1.49 million in 2020-21. Lani Strathearn joined the team as Marketing Manager to spearhead the rollout of the Cairns & Great Barrier Reef brand – ‘See Great. Leave Greater.’. The region launched new seasonal and niche market campaigns to drive visitation as soon as travel windows opened between more than 30 state and regional lockdown announcements.

The region's first domestic summer campaign, Summer Great, launched to the domestic market to claw back visitor numbers after lockdowns had decimated the traditional peak season. A giant inflatable snorkeller was dropped into Darling Harbour, Sydney in December to attract attention and generated almost \$4.5 million in publicity in its few weeks while the campaign generated more than \$12.6 million in gross sales from our retail partners.

Publicity has been a focus, generating more than \$63 million in destination promotion through media and influencer famils and live crosses from major breakfast programs. Nine television shows were filmed in region including Amazing Race, Real Housewives of Melbourne, Taste of Australia and Weekender.

DIGITAL REACH

HIGHLIGHTS



DESTINATION WEBSITE
REACHED **ONE MILLION**
UNIQUE USERS (UP 71%)



OPERATOR REFERRALS
REACHED **227,000**
(UP 148%)



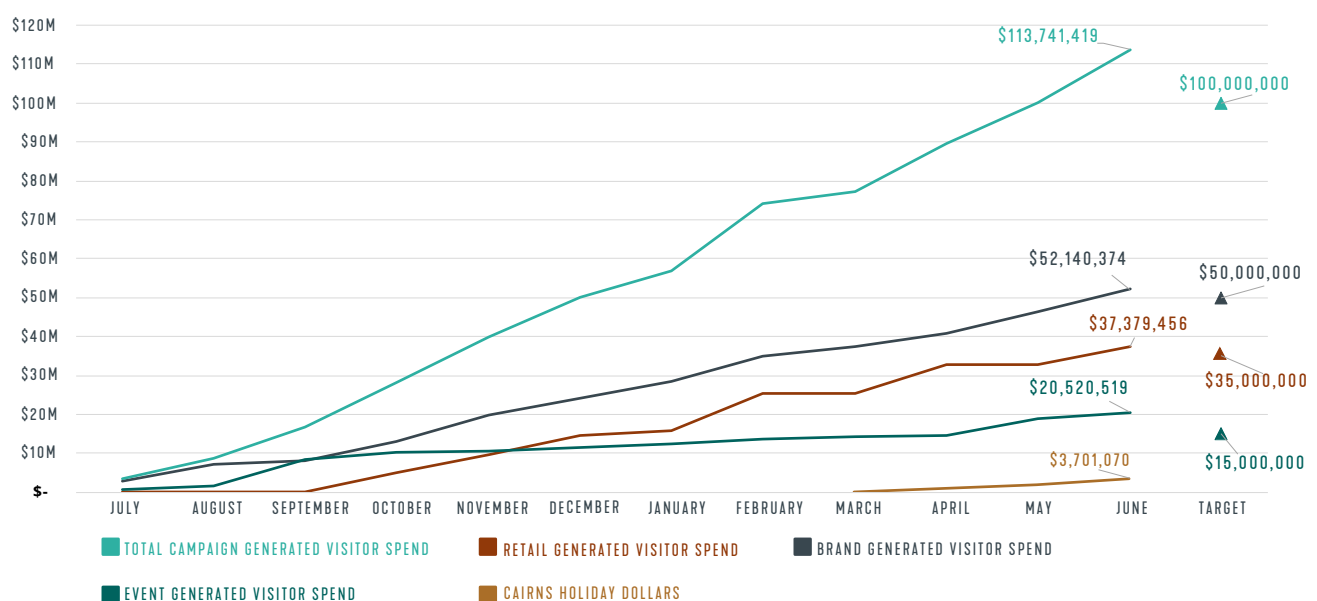
DIGITAL MEDIA AVE OF
\$2.2 MILLION AND
REACH OF 14 MILLION



HOSTED **20 MEDIA &
SIX INFLUENCERS**

The destination's website and social channels had an organic reach of 33.5 million with an advertising equivalent value of \$2.2 million and 227,000 referrals to the industry. This includes the Japan, China and German channels. The destination Instagram account had an organic reach of 61.7 million and ended the financial year with 199,000 followers. The destination Facebook page had an organic reach of 9.9 million and 210,000 followers.

CAMPAIGN GENERATED OVERNIGHT VISITOR SPEND 2020/21



INTERNATIONAL MARKETING



Despite international borders being closed, our focus was to maintain our connection and our share of voice until travel bubbles open. New Zealand presented the earliest opportunity with the travel bubble starting on 18 April 2021 and direct flights from Cairns on 19 June. The first New Zealand flight was greeted with a Cairns Airport activation and later that month the State Government announced year-round services to Cairns with Air New Zealand.

Focus group research was undertaken in market to identify key challenges and opportunities to inform our re-entry plan into New Zealand. Media educationals were secured once the travel bubble was announced with one undertaken and several organised for the following financial year. Thrive PR New Zealand was appointed to assist with further influencer and media engagement.

WESTERN

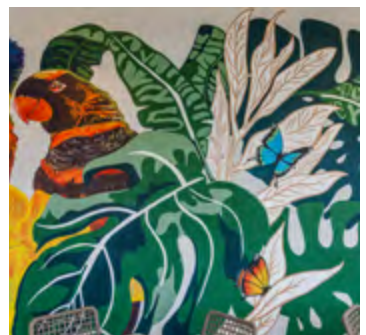
- ATEC Inbound Up North
- Australian Tourism Exchange 2021
- Australia Marketplace UK/Europe & USA
- ATEC Meeting Place Online
- TA/TEQ Germany – ASP Virtual Product Showcase
- TEQ UK Virtual Media Marketplace
- Queensland Tourism Exchange North America
- NZ Aussie Specialist online destination webinar
- USA Virtual Media Event (live filming of Ochre cooking class)
- USA – About Australia Campaign

CHINA

- Livestream training session with TA at Rusty's Markets showcasing local produce
- Livestream destination update with TEQ at Crystalbrook Riley to 573 agents
- Three domestic Chinese influencers were in region in May covering three different themes
- TA China Marketplace
- Business Events Australia Greater China Showcase
- Business Events Australia training for 150 agents across three seminars

JAPAN & SOUTH EAST ASIA

- Tokyo Marine Diving Fair Online
- JATA Online Travel Mart
- Koala naming competition in Japan reached over 5 million people
- An international push in Japan in the lead-up to the Olympic Games
- Ambassador campaign with national swimmer Rika Omoto
- Two domestic Japanese travel media in region
- TA Japan Marketplace
- TTNQ took more than 200 Japanese Aussie Specialist travel agents on a virtual walking tour of Cairns



BUSINESS & MAJOR EVENTS

EVENTS BECAME AN EMERGING PRIORITY FOR THE REGION'S RECOVERY AFTER SECURING AN ADDITIONAL \$3 MILLION IN FUNDING FOR BUSINESS AND MAJOR EVENTS.

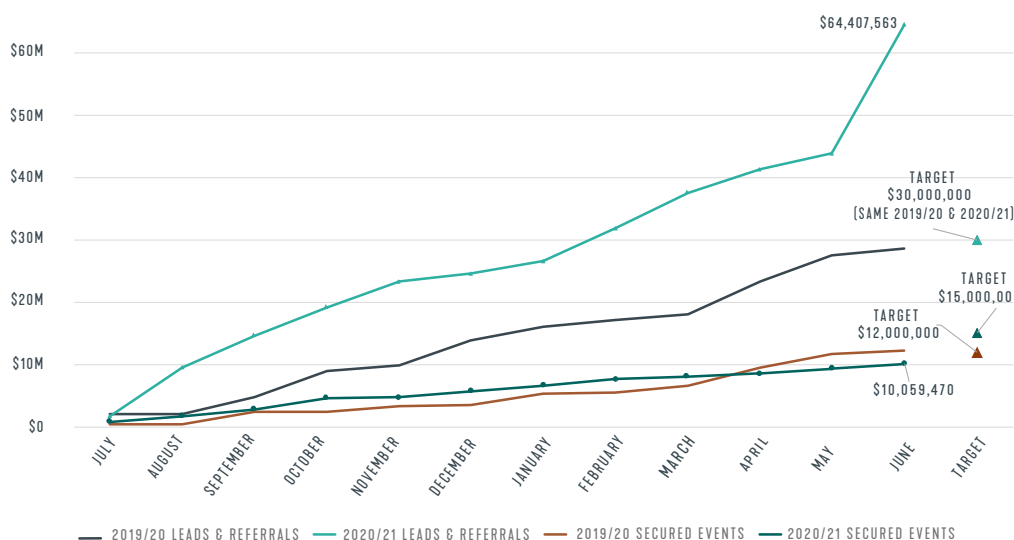


More than \$10 million worth of events were secured, an increase of almost \$1 million from the previous year (\$9.3 million). Leads for business events also increased to more than \$64.4 million with half of these coming from April to June 2021. Industry sectors less affected by COVID-19 such as medical, pharmaceutical, automotive, education, construction and technology dominated the confirmed events.

Confidence is slowly returning to the sector as a result of local, State and Federal Government stimulus packages offering suppliers flexibility with the postponement of events. Trends include smaller group sizes and very short lead times for bookings.

Destination specialist Clockwise Consulting was appointed in May to assist with building the business events pipeline for the coming five years and this has contributed to a surge of new inquiries

Business Events Cairns & Great Barrier Reef also launched virtual site inspections to showcase venues to event organisers on the other side of closed borders and the world. The new business events brand 'Work Great. Leave Greater', which leverages the consumer brand, was launched during the year and supported by new marketing collateral including destination videos and virtual site inspections. These tools were used during virtual events to showcase the destination to event organisers on the other side of closed borders and the world.



BE Immersed: Cairns & Great Barrier Reef was launched in May 2021 as part of the brand repositioning for business events. This replaced the long-running Sell TNQ educational program which had been showcasing the destination to Australian and New Zealand meeting planners for over 20 years until its cancellation in 2020. The 2021 event was a success with 19 delegates and two media undertaking a four-day program in Cairns and Port Douglas.

ECONOMIC CONTRIBUTION OF BUSINESS EVENTS

- 98 events
- 7,485 delegates
- Direct economic value of \$7.4 million
- Indirect economic contribution of \$22.2 million

BUSINESS EVENTS ACTIVITY

- 115 leads received, valued at over \$64 million
- 23 leads confirmed, worth over \$10 million
- 4 referrals, worth \$1 million

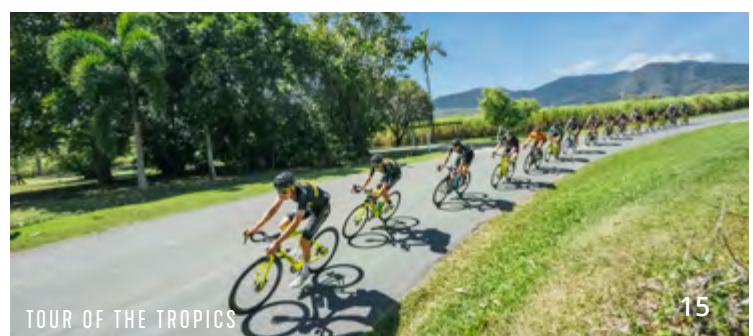
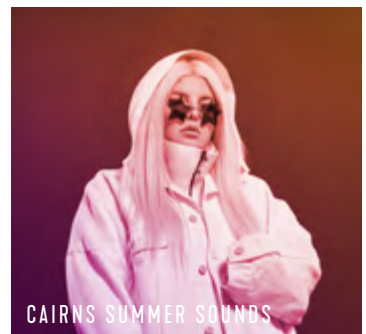
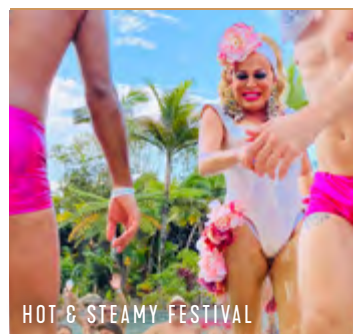
LEISURE EVENTS

After multiple cancellations in 2020, the first event for the financial year was the Tour of the Tropics in August. Ironman and Targa Great Barrier Reef followed in September with a greatly reduced program and field as a result of COVID-19. Savannah in the Round and Port Shorts were able to proceed in October with reduced capacities. Outbreaks in southern states brought major sports to Queensland with the Women's NBL, Super Netball and AFL games secured for Cairns.

Cairns Summer Sounds was launched by Cairns Regional Council to drive visitation in February and March with Tones and I, Amy Shark, Bernard Fanning and John Butler performing. However, border closures and illness impacted some of the performances which were postponed to May. The Great Barrier Reef Masters Games, Port Douglas Carnivale, Red Hot Summer Tour and the Rotary FNQ Field Days were highlights in May with attendance figures nearing pre-COVID times.

MAJOR EVENTS

- Cairns Indigenous Art Fair Online – July
- Tour of the Tropics – August
- Savannah in the Round – October
- Port Shorts – October
- Hot & Steamy Festival 2021 – February
- Cairns Summer Sounds – February-May
- Great Barrier Reef Masters Games – May
- Port Douglas Carnivale – May
- Red Hot Summer Tour – May
- Rotary FNQ Field Days – May
- Ironman Asia-Pacific – June
- Cooktown & Cape York Expo 2021 – June



SUSTAINABLE GROWTH

✓ DISPERSAL OF VISITORS
54.6% (35%)

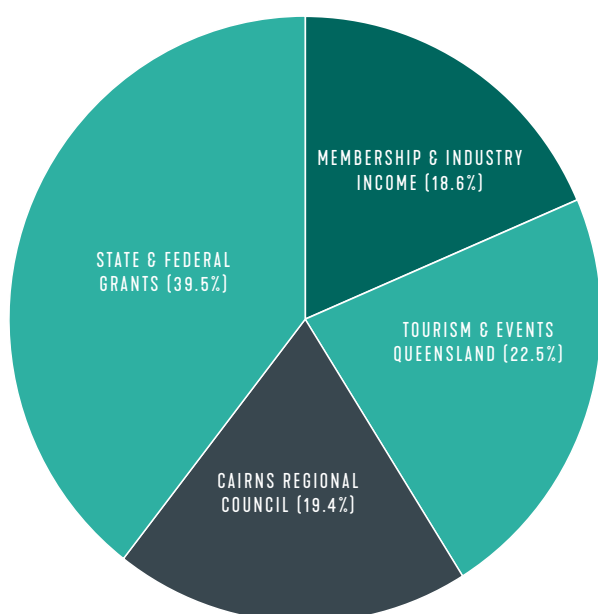
✓ AVIATION SEAT CAPACITY
81% OF PRE-COVID (80%)

SUSTAINING TTNQ

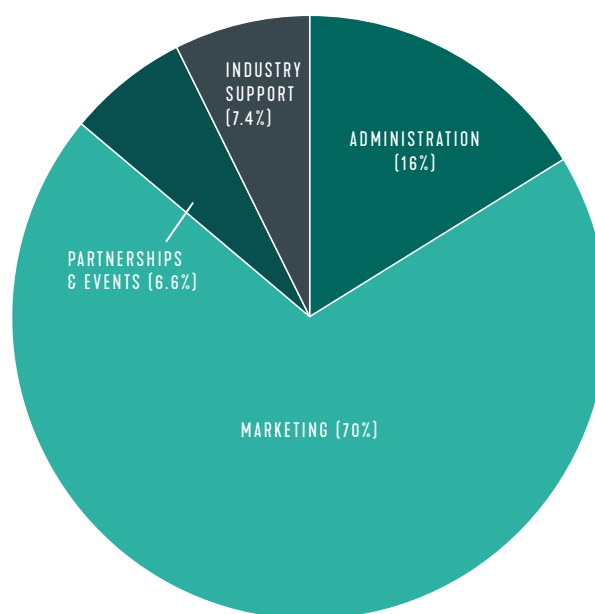
With a \$13.5 million organisation budget, but no access to international markets, all positions in the organisation were reviewed to reset TTNQ's structure. Three new roles were created over the past 12 months; Manager – Corporate Services, Marketing Coordinator – Campaigns & Content and Project Assistant to manage the additional State and Federal funding after the organisation was downsized in early 2020.

Sustainable funding of the organisation confirmed through a \$16.5 million five-year funding agreement with Cairns Regional Council, the first time TTNQ has received a long-term commitment for the industry. Later in the year TTNQ secured a \$10 million federal Recovery for Regional Tourism Program giving the organisation a \$13.5 budget in 2020-21, and a \$17 million in 2021-22. A total of \$1 million of industry funds were retained for 2021-22 marketing and aviation support activities.

TTNQ INCOME 2020-21



TTNQ EXPENDITURE 2020-21





SUPPORTING OUR MEMBERS

With more than 650 businesses in our region in hibernation, TTNQ membership fees were waived until January 2021. We began the financial year with 466 members and continued accepting members with an all-time high of 550 in December 2020. We then dropped to 520 by June 2021 with 93.6% of members from the previous year renewing.

Members recognised the valuable advocacy and marketing role TTNQ is playing with an 87% satisfaction result. Some increased their membership level resulting in \$267,800 in revenue, exceeding our target of \$260,000.

TTNQ was a strong advocate for the industry, successfully lobbying for an extension of Cairns Holiday Dollars, the Work in Paradise campaign and pushing for direct business support. The average member engagement is 79.8% a month with a target of 80% or 400 members a month. Member satisfaction measured through our annual survey is above our target of 85% with 87% support for the organisation and a strong push for continued lobbying and domestic marketing.

MEMBER FUNCTIONS

- 4 September 2020 – Hilton Cairns
- 21 October 2020 – Events Cinema Cairns
- 2 December 2020 – Hemingways Port Douglas (TTNQ and TPDD joint networking)
- 15 December 2020 – Crystalbrook Flynn (TEQ and TTNQ joint networking)
- 3 February 2021 – Sauce Brewing Co
- 2 June 2021 – Oak and Vine Cairns



MARKETING RETURN ON INVESTMENT

Partner and co-operative marketing funds have continued to far exceed the organisation's annual target of \$2 million with \$2.9 million worth of contributions generated predominately through retail campaigns.

INDIGENOUS TOURISM

TTNQ continues to support the TNQ Indigenous Experiences Cluster Group to better promote culturally appropriate tourism experiences.

With the Year of Indigenous Tourism extended to 2021, TTNQ was able to source \$200,000 in funding and contributed another \$200,000 for Indigenous tourism operator mentoring, media and trade shows. Consultants worked with operators in areas like search engine optimisation and social media activation. A market activity mentoring project included a checklist for operators to ensure they were across all aspects of the industry such as ATDW, Cairns tour desks, niche markets and industry memberships.

SUSTAINABILITY

Our marketing of Cairns & Great Barrier Reef showcases the region as Australia's leading sustainable destination. As an organisation, TTNQ is benchmarked against the Queensland RTOs through the ASPIRE program which also provides national benchmarks. We were ranked second of the 13 RTOs and in the top four for each of the metrics.

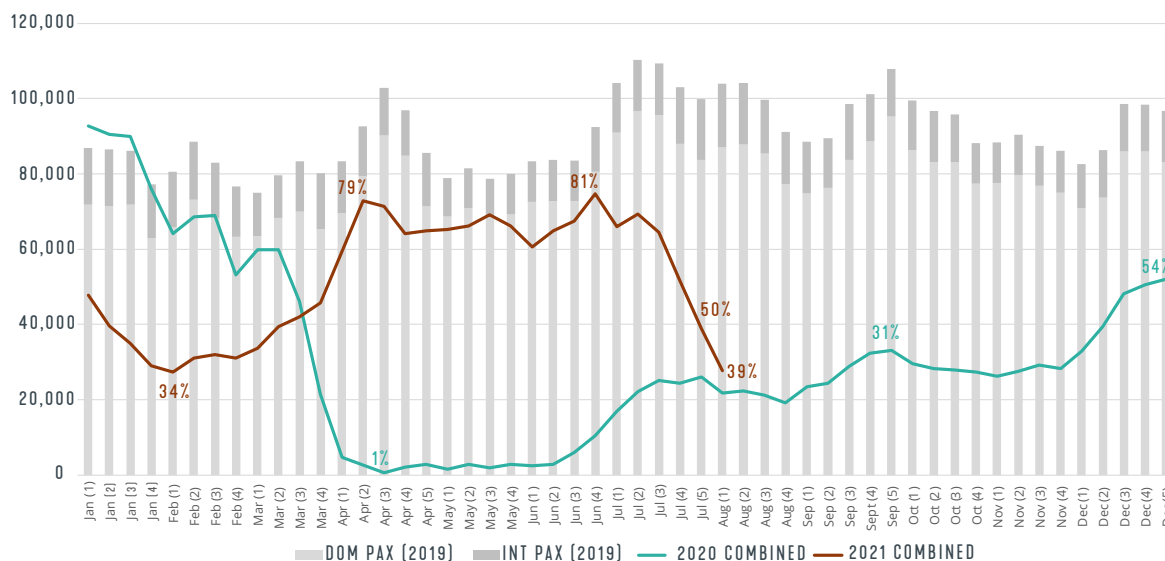
- Ranked 1 in co-operative marketing income with more than \$5,700 per member generated.
- Ranked 2 for the proportion of total income invested back into marketing.
- Ranked 2 for the proportion of local government contribution to tourism per capita.
- Ranked 4 for overnight visitor spend per dollar invested by State and local government.

AVIATION

A total of 2.16 million passengers came through the Cairns Airport in 2020-21, down from 3.61 million the previous year. Half-price fares were announced in March 2021 stimulating bookings to the destination with domestic arrivals peaking at 137,685 in April, 79% of pre-COVID numbers.

New domestic routes were added with Alliance Airlines flights from the Sunshine Coast starting on 17 July 2020 and direct flights from Newcastle beginning on 22 April. The first Qantas flight from New Zealand arrived on 5 June and by the end of the month Air New Zealand had announced year-round flights to Cairns.

TOTAL CAIRNS AIRPORT WEEKLY PASSENGERS (2020-21)



ACCOMMODATION

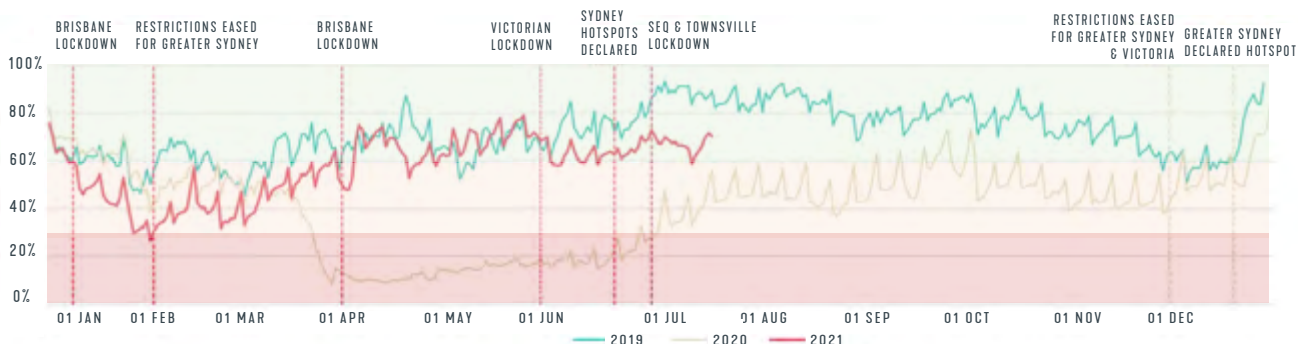
Crystalbrook Flynn opened on 10 November adding 311 rooms to the region after postponing its original opening date in March. DoubleTree by Hilton with 197 rooms, reopened on 9 February after being closed for almost a year.

Occupancies, average daily rate and the average length of stay in April, May and June exceeded the 2019 figures. The average daily rate was \$245.52 in June 2021, occupancy was 61%, and average length of stay 4.38 days with the reservation window growing to 62.08 days after heavy holiday bookings meant some people missed out on the accommodation of their choice.

ACCOMMODATION OCCUPANCY (2020-21)

KEEP OCCUPANCY RATE ABOVE 60%

IDEALLY BACK TO 70%+ DURING DEC/JAN AND THROUGH SUMMER



SATISFACTION

VISITOR SATISFACTION

Visitor satisfaction measured through the destination sentiment index is up from the previous financial year from 25% to 29% in June 2021, slightly behind the target of 30%. Community support was on target at 42%, while consumer sentiment hit a record high with an average of 29% up from 25% the previous year.



NET PROMOTER SCORE
29% (TARGET 30%)



MEMBER SATISFACTION
87% (TARGET 80%)



COOP MARKETING
CONTRIBUTION \$2.97 MILLION
(TARGET \$2 MILLION)

TOURISM SENTIMENT INDEX – CAIRNS VS GOLD COAST 2020-21



MEMBER SURVEY RESULTS 2020

HOW DID WE PERFORM IN 2020



86%

ARE SATISFIED
WITH THEIR TTNQ
MEMBERSHIP



87%

ARE SATISFIED WITH
THE STRATEGIC
DIRECTION



100%

FIND OUR
E-COMMUNICATIONS
USEFUL



80%

FIND OUR MARKETING
CO-OPERATIVE
OPPORTUNITIES
RELEVANT & EASY
TO ACCESS



PARTICIPATING IN MARKETING CO-OPERATIVE OPPORTUNITIES IS AVAILABLE FOR PARTNER OF TOURISM LEVEL AND ABOVE.

HOW CAN TTNQ SUPPORT MEMBERS IN 2021?



82%

WANT TTNQ TO
CONTINUE TO TAKE
ON MORE ADVOCACY
ACTIVITIES

TOP THREE NICHE MARKETS



1 DRIVE (THE MOST
POPULAR BY FAR)



2 ADRENALINE &
ADVENTURE



3 FOOD & DRINK

MEMBER BENEFITS PRIORITY RANKINGS



1

ACCESS TO
RESEARCH &
INSIGHTS



2

INDUSTRY
COMMUNICATIONS



3

TRAINING &
EXPERIENCE
DEVELOPMENT



4

INDUSTRY
MARKETING
GROUPS &
ROUND TABLES



5

ATTENDING
MEMBER
NETWORKING &
INDUSTRY EVENTS



6

VOTE AT THE
ANNUAL GENERAL
MEETING (AGM)

MARKETING CO-OPERATIVE FOCUS FOR 2021 PRIORITY RANKINGS



1

SOCIAL MEDIA



2

MEDIA & PR
OPPORTUNITY



3

SOCIAL
INFLUENCERS



4

INCLUSION ON
TTNQ 'DEALS PAGE'



5

CAMPAIGN
LEVERAGE



6

RETAIL & TRADE
PARTNERSHIPS

TOURISM TROPICAL NORTH QUEENSLAND'S ROLE

TTNQ's role has evolved from a destination marketing organisation to include advocating for the industry and delivering cost-effective marketing activities. We will continue to focus on the domestic market, and key international markets as travel bubbles are negotiated. We are committed to work with the industry to inspire, inform and build the world's greatest visitor experiences.

**OUR GOAL IS THAT EVERY VISITOR LEAVES THE
DESTINATION FEELING CONNECTED TO THE REGION
AND ITS STORIES, AND THEY SHARE THOSE STORIES WITH
THEIR GLOBAL NETWORK TO INCREASE VISITATION.**

HOW WE MEASURE SUCCESS?



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



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

“QUOTES FROM MEMBERS WHO COMPLETED OUR SURVEY

Thanks for doing a wonderful job through these difficult times, well done.

Amazing work in pivoting your marketing this year.

Thank you for your regular communications and updates and lobbying on the industry's behalf. I look forward to working with you next year.

Capture the luxury market who have the extra funds to spend in the local area.

Continue to concentrate on destination marketing first and foremost.

Our motivation behind membership has always been to support the broader marketing of the destination, rather than secure direct benefits to our business.

Would be great if marketing cooperatives could provide lower investment entry points so smaller businesses could participate.

How about we focus on new markets like Korea or Singapore!

BOARD OF DIRECTORS

KEN CHAPMAN

CHAIR – APPOINTED DIRECTOR

Skyrail Rainforest Cableway, Chairman

WAYNE RENOLDS

DEPUTY CHAIR – GENERAL DIRECTOR

The Reef Hotel Casino, General Manager Hotel

TARA BENNETT

CAIRNS NORTH ZONE DIRECTOR

Tourism Port Douglas Daintree, CEO

MARK EVANS

SOUTHERN ZONE DIRECTOR

Paronella Park, Director Marketing & PR

CRAIG BRADBERY

GENERAL DIRECTOR

Silky Oaks Lodge (Baillie Lodges) , CEO

JANET HAMILTON

CAIRNS SOUTH ZONE DIRECTOR

Cairns Convention Centre, General Manager

PAUL FAGG

TROPICAL TABLELANDS & REMOTE ZONE DIRECTOR

Skybury Coffee, Business Development Executive

JEFF GILLIES

GENERAL DIRECTOR

Coral Expeditions, Commercial Director

JOEL GORDON

GENERAL DIRECTOR

Crystalbrook Collection, Area Manager Cairns

JOHN O’SULLIVAN

APPOINTED DIRECTOR

Experience Co, CEO

RICHARD BARKER

APPOINTED DIRECTOR

Cairns and Mackay Airports, CEO

SAM FERGUSON

GENERAL DIRECTOR

The Accommodation Centre, Destination Cairns
Marketing, General Manager Commercial

FINANCE, AUDIT AND RISK MANAGEMENT COMMITTEE

GREG NUCIFORA

CHAIR

Bell Potter Securities, Branch Manager

WAYNE REYNOLDS

DEPUTY CHAIR

The Reef Hotel Casino, General Manager Hotel

KEN CHAPMAN

Skyrail Rainforest Cableway, Chairman

JEFF GILLIES

Coral Expeditions, Commercial Director

LUCKBIR SINGH

MacDonnells Law, Director

MARK OLSEN

TTNQ, CEO & Company Secretary

ROSIE DOUGLAS

TTNQ, General Manager – Partnerships & Events

HUMAN RESOURCES COMMITTEE

JANET HAMILTON

CHAIR

Cairns Convention Centre, General Manager

KEN CHAPMAN

Skyrail Rainforest Cableway, Chairman

WAYNE REYNOLDS

The Reef Hotel Casino, General Manager Hotel

MARK OLSEN

TTNQ, CEO & Company Secretary

A couple is sitting on a large, smooth, reddish-brown rock in a tropical river. The water is clear and green, reflecting the surrounding lush green forest. The background shows more of the river and dense tropical vegetation.

VISIT OUR CHANNELS

CONSUMER

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