



ANNUAL REPORT 2021-22

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.**



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CHAIR'S REPORT

The 2021-22 financial year was another challenging time, starting with State and National borders closed, before transitioning to fully open borders and few restrictions. Armed with additional Federal funding for domestic promotion and continuing strong support from Cairns Regional Council, Tourism Events Queensland (TEQ) and our members, Tourism Tropical North Queensland (TTNQ) mounted the biggest integrated domestic marketing campaigns in our history. The results are impressive and clearly demonstrate the difference that strong funding for destination marketing can make to this region's tourism industry and the broader economy.

The direct measured results of these campaigns was an outstanding \$166M in advertising value and \$147M in direct campaign generated visitor expenditure. This is from a total budget for the whole organisation of just over \$16M. However, it is the awareness and visitor motivation effects of the marketing where we see the true benefits. Cairns was by far the most Googled regional destination in the country throughout the year which is a fantastic achievement. This flowed on to our website which saw a record 1.9M visits and generated 312,000 referrals to operators.

It also flowed on to visitation. By year's end, domestic tourism was at record levels, well above pre-pandemic norms. Cairns, Port Douglas and the whole region has its buzz back which is wonderful to see. Domestic visitor expenditure was \$3B, the highest ever result. We were the only destination in Queensland to achieve such growth and increased our market share significantly as a result. These results clearly show that, if given the resources, this organisation can achieve great results and disproportionate economic benefits for our community.

Unfortunately international visitation is recovering slowly and the record domestic results do not make up for this loss. It will take a big effort and serious marketing resourcing to get our international numbers back to where they were.

We advocated strongly throughout the year and achieved a further Federal funding commitment for international market recovery in the May budget of \$15M over three years. This is what we need to shift the curve and bring forward international recovery. However, the new Government is yet to deliver on this budgeted funding and it seems we may remain in limbo until the new budget in October. We are already active in key markets but these efforts will remain limited without this additional funding which is vital to our community.

This year we also embarked on a constitutional review to update our aged and clunky constitution and to modernise our organisation's corporate governance structure to contemporary best practice. We will be taking this to our members in the coming year.

Throughout the year, Mark Olsen and the whole TTNQ team have put in an extraordinary effort and achieved outstanding results. On behalf of the Board, our members and the 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 challenging times. And most particularly to our members and supporters, thank you for your continuing support. We have much to do to maintain the domestic momentum and regain our international business and your support has never been more important.



Ken Chapman
Appointed Director – Chair



CEO'S REPORT

Tourism Tropical North Queensland's intense lobbying for additional marketing funds and industry support paid off this year with strong domestic results exceeding expectations after a tumultuous 2021. A record \$3B in domestic visitor expenditure for the year ending March 2022 was an 18.8% increase on pre-pandemic spending. This figure resulted from a record number of visitor nights and daily spend increase in the absence key markets New South Wales and Victoria which were locked out for almost the entire first six months of the financial year.

This much needed visitor expenditure boost for our regional economy is on the back of solid tourism investment by Cairns Regional Council to help drive employment in our community and new funding by the Federal Government to focus on the domestic market. State Government support through initiatives like the Cairns Holiday Dollars helped drive vital intrastate visitation through the early part of the reporting year while borders were closed.

With the ability to invest strongly in marketing and public relations, TTNQ increased the region's share of voice to \$166M Advertising Value Equivalent (AVE), 38% above the target. Leisure AVE was 47% above the target at \$147M, raising awareness of our destination, while corporate communications was 25% above target with the \$10M achieved proving TTNQ was a powerful voice for the industry.

Our website traffic hit 1.9M for the year, resulting in another record of 312,000 operator referrals – more than doubling the annual target. In addition to our seasonal, niche and retail campaign activity, TTNQ launched a \$250 Tropical Travel Bonus bringing \$30M in direct sales to drive bookings for summer experiences. The highlight of the PR calendar was a mega famil in May showcasing the destination's regions to Australian media.

With staffing remaining an issue for the industry, we launched the working holiday maker campaign with Global Work and Travel and Singapore Airlines to leverage Tourism

Australia and Tourism and Events Queensland's campaigns and supported the Work in Paradise program to encourage staff to choose our region.

We are predicting the region's international recovery to be slow, but increased our presence in key markets in 2022 as borders opened and direct flights returned. International PR agencies were appointed in New Zealand, Europe, UK, US and Japan to elevate our destination's re-entry into those markets. New Zealand media and influencer famils had a few bumps but got great results. Our first US trade famil activity in June brought 11 premier Aussie Specialists in region and a social media influencer was appointed Cairns & Great Barrier Reef Ambassador in Japan. European media activity was ramped up with extensive interest in new Indigenous products, while the Working Holiday Maker campaign targeted the UK. We continued our presence in China with online events and very strong results on TTNQ's Weibo account.

Thank you to our small team of 17 whose achievements lead many to believe we are a much larger organisation, but confirm their passion for the industry and the destination. I also thank Chair Ken Chapman and the Board for their insight and advice and acknowledge the contribution of Brian Arnold, Sam Ferguson, Paul Fagg and Mark Evans who made valuable contributions to the region in their time on the Board.

With our Chair and the Board, TTNQ will continue to guide our industry forward along the path to recovery and the goal to be the most visited nature-based and ecotourism destination in Australia.



Mark Olsen
Chief Executive Officer



DESTINATION UPDATE

OUR GOAL

TO BE A GLOBAL LEADER IN NATURE-BASED AND ECOTOURISM, DRIVING VISITOR SPEND.

\$
\$3B RECORD
EXPENDITURE

Domestic visitors delivered a record \$3B expenditure for the year ending March 2022, an additional \$700M or 18.8% increase on pre-pandemic spending, thanks to a record number of visitor nights and increase in the daily spend. The region's share of Queensland visitor nights grew to 12.4%, up from 11.4% in 2019, and visitor spend exceeded its 14% target to reach a 16% share of the State's visitor spend, another record.

These records were despite New South Wales and Victorian residents being locked out for almost the entire first six months of the financial year. Operators were anticipating a busy winter season to kick off the 2021-22 financial year, but the Delta strain shut borders to our two biggest domestic markets sending airport passenger numbers to their lowest pandemic level in August at just 11% of pre-COVID numbers. Low numbers remained constant for the remainder of 2021 until borders opened in mid-December only to have growth slowed by inadequate testing facilities.

With Queensland borders finally open, average occupancy rates were above 2019 figures in January and in each month from March. Easter finally brought much needed volume of visitors with Cairns Airport exceeding 2019 figures by 102% and continuing to perform strongly throughout winter, ending the financial year at 86%. Occupancies soared above 85% with regions like Port Douglas, Daintree and Palm Cove above 95%.

With the border closures it was not surprising that Queenslanders were our biggest market for 2021-22 with just 524,000 interstate visitors, down 26.9% from 2019. International borders were closed until 21 February and our only direct international flight did not start until a month later when Singapore Airlines touched down on 28 March.

THE YEAR IN REVIEW 2021-22

DESTINATION KPI	VALUE	% OF TARGET
OVERNIGHT VISITOR SPEND (MAR 22)	\$3B	134%
SHARE OF QUEENSLAND NIGHTS (MAR 22)	12.8%	111%
GOOGLE RANK	3	100%
WEBSITE TRAFFIC	1.89M	126%
AVIATION PASSENGERS VS 2019 (YTD)	79%	105%
ACCOMMODATION OCCUPANCY	84%	112%
VISITOR SATISFACTION	30	94%

COMPARED TO YE MARCH 2019:

- Total domestic visitor numbers were down 6.8% to 2.1M, but well above the State's decline of 19.9%.
- Holiday visitors remained steady at 1.1M, also outperforming the State's 9.5% decline.
- Visitor nights were up 3.7% to 10.8M, while Queensland's were down 17.5%.
- Holiday nights grew 6.5% to a record 6.5M.
- The average length of stay for holiday visitors grew by 0.4 to 5.7 nights.
- Spend was up 23.3% to \$276 per night.
- 12.4% share of domestic visitor nights, above the 12% target.

TTNQ UPDATE

OUR MISSION

A RAPID RECOVERY, GENERATING \$4B IN VISITOR SPEND BY 2025 THROUGH INNOVATIVE MARKETING, A UNIFIED BRAND AND EFFICIENT USE OF RESOURCES.



TTNQ maintained our advocacy role in 2021 as we prepared for border openings to ensure our industry could meet demand, but was strongly back in the business of destination marketing and bidding for business events in 2022 to fight for a much stronger market share of the limited visitors marketplace. With additional funding secured the previous financial year, we were able to aggressively target domestic travellers and widely showcase the world-class activities and landscapes of Tropical North Queensland. The TTNQ team has done an outstanding job in challenging circumstances with the majority of business targets met or exceeded.

At a Board level we thanked Sam Ferguson, Paul Fagg and Mark Evans who retired, and welcomed Ben Woodward and Brian Arnold following their election at the October AGM. Growing business commitments forced Brian to leave in March.

KEY HIGHLIGHTS FOR 2021-22:

- \$124M in campaign generated Overnight Visitor Expenditure (OVE), 24% above the \$100M target.
- \$80M in business event leads, right on target.
- \$3.4M in member and partner funding, more than double the \$1.5M target.
- 92% member satisfaction, above the 85% target.
- Increasing to #2 ranked RTO in Queensland for funding and efficiency, above the #3 target.
- Cairns & Great Barrier Reef website reached 1.9M users (300% up on 2019) driving 320,000 referrals to operators.
- Publicity of the coral spawning generated nearly \$23M in positive global coverage for the Great Barrier Reef.
- Restart of our international media activity with PR agencies appointed in the UK, Europe, US, Japan and New Zealand.
- A \$15M budget commitment from the Federal Government which now needs to be confirmed.
- Developed TTNQ's Create Great program with 80 funding packages for industry to update their websites and content.
- Consultation commenced on the TNQ First Nations Tourism Plan.

ORGANISATION WINS:

- Announcement of Crankworx Cairns 2022 and 2023 with 320M global audience.
- Business Events Strategy completed.

AS AN ORGANISATION IN THE VISITOR ECONOMY TTNQ CAN INFLUENCE:



GROWING OUR SHARE:
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



KEY HIGHLIGHTS

SHARE OF VOICE



**THE SECOND CONSECUTIVE RECORD YEAR FOR GENERATING
PUBLICITY AND AWARENESS OF OUR REGION.**

TTNQ generated a record \$166M worth of publicity for the region and came close to doubling the website traffic for a second year in a row with 1.9M users. A series of campaigns including Summer, Eco-luxury, Drive North Queensland and regional events marketing kept Cairns the third most Googled destination in Australia.

The inaugural Cairns Unearthed publication was launched in October 2021 with 107,000 copies distributed to Brisbane, Sydney and Melbourne through the Weekend Australian. Another first was the brand takeover of Concrete Playground in partnership with Qantas to launch the airline's Green tier Frequent Flyer program.

An international working holiday maker campaign was launched in partnership with Global Work and Travel, reaching more than 3M people in the UK, Ireland and Germany and generating 1,400 registrations to the competition to win a first class trip to Australia.

Niche market activities were targeted to capture new audiences and increase return visitation for travellers seeking youth and adventure, eco-luxury or drive holidays, including the Drive North Queensland partnership with five Regional Tourism Organisations.

KEY HIGHLIGHTS FOR 2020-21 INCLUDE:

 **#3 AUSTRALIAN
DESTINATION ON GOOGLE**

 **\$124M CAMPAIGN GENERATED
SPEND (24% ABOVE TARGET)**

 **\$166M AVE
(38% ABOVE TARGET)**

KEY HIGHLIGHTS FOR 2021-22

- Generated \$166M Advertising Value Equivalent (AVE), 38% above target.
- The Leisure AVE of \$147M was 47% above target raising awareness of our destination through domestic and retail campaigns and PR.
- Corporate communications was 25% ahead of target with the \$10M achieved showing that TTNQ continued to be a powerful voice for the industry.
- Website traffic hit 1.9M with the reach 26% above target.
- Hosted 24 domestic media on individual itineraries and a Mega Famil which will continue to drive share of voice over the next year.
- Seven content creator and influencer partnerships generated 4M reach and \$253,000 AVE.

CAMPAIGN ACTIVITY

- Campaigns generated more than \$124M in direct visitor spend, including \$44M from retail campaigns and more than \$24M in direct bookings from brand and event campaigns.
- Tropical Travel Bonus launched with Flight Centre, Helloworld and My Queensland generating \$5M AVE, \$11M sales and 12,000 visitors.
- Summer Great campaign generated \$3.8M in media value reaching more than 6M people. Inaugural Cairns Unearthed magazine inserted in the Weekend Australian as part of campaign.
- Autumn campaign resulted in \$1.7M media value, 9M reach and 310,000 conversions to site. Brand takeover of Concrete Playground to launch Qantas Green tier was part of this campaign.

DOMESTIC MARKETING

TTNQ's marketing strategy remained nimble to adjust to border closures including the loss of our two largest domestic markets for the first half of the reporting period. This strategy contributed to achieving the fastest recovery with a record \$3B visitor spend ranking sixth nationally. Innovation was essential to cut through a very competitive landscape and resulted in leveraging the activities of partners that aligned with the Cairns & Great Barrier Reef brand. These included the launch of the Qantas Green tier frequent flyer program with a Cairns & Great Barrier Reef brand takeover of digital publisher Concrete Playground to create the Green Playground activation, reaching more than 9M Australians.

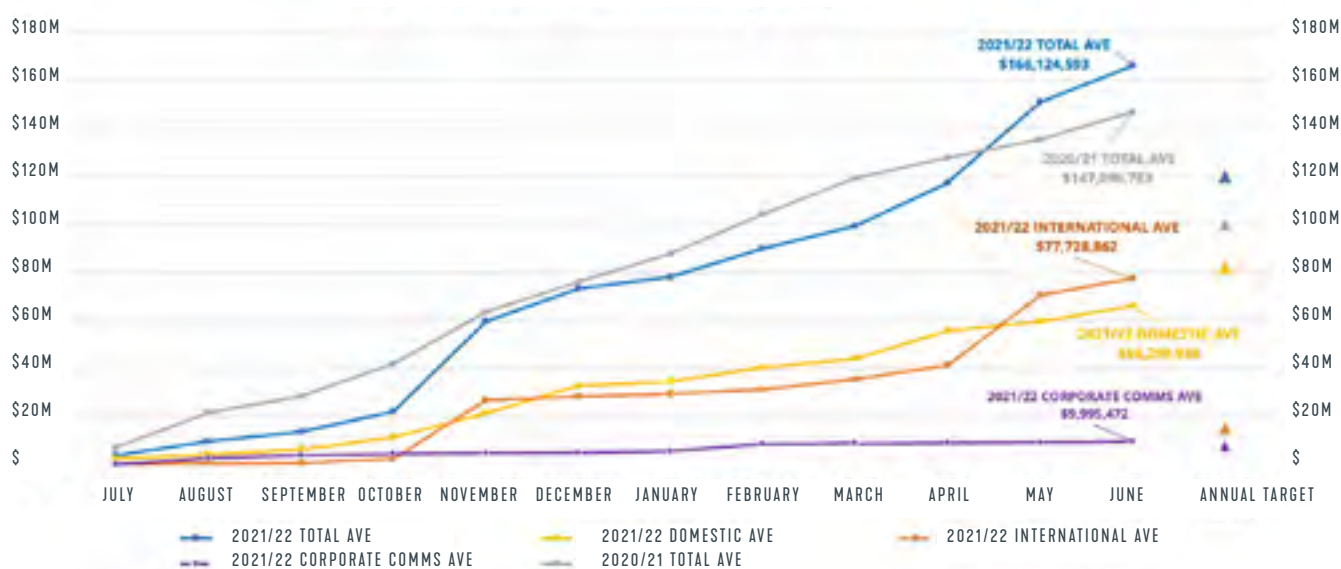
The evolution of the 'See Great. Leave Greater.' brand continued through seasonal brand campaigns, with a particular focus on our shoulder season to generate year-round domestic visitation across summer and autumn. In addition, targeted niche marketing campaigns continued across the year to attract markets looking for drive, eco-luxury or youth and adventure

holidays. Additionally, TTNQ launched the inaugural annual Cairns Unearthed destination magazine which was distributed in Brisbane, Melbourne and Sydney in the Weekend Australian. These efforts in brand and retail marketing contributed to \$67M of the organisation's AVE and \$68M in visitor spend.

Publicity and media remained a top priority for the year and were pushed through a new PR partnership with public relations agency PEPR to continue to engage domestic media through increased pitching and a targeted fam program. The media fams generated more than \$29M in AVE and included a targeted Palm Cove fam for four media and hosting 10's The Living Room in region. The reporting period ended with the region's mega media fam hosting 20 Australian travel writers from digital and print publications across the region to generate earned media publicity for the next 12 months. Weather crosses from the Today show, Reel Destinations, Coast to Coast, and 7 Weekender were added to the mix.



CUMULATIVE AVE RESULTS (2021/22) WITH FORECASTS AND TARGETS FROM ALL MEDIA (TARGET \$120M)



INTERNATIONAL MARKETING



While international borders remained closed until February 2022, much of our work focused on maintaining connection and share of voice until Australia opened. Full-service carrier Singapore Airlines commenced in March 2022 with a year-round service Singapore to Cairns, flying five times per week providing fantastic connections to UK and Europe.

The international team hosted the REconnect and REengage Inbound Tour Operator workshop in Sydney bringing 26 members to the trade with the destination's new offerings. Face-to-face meetings at the 2022 Australian Tourism Exchange (ATE) were a highlight with the team meeting more than 75 agents, followed by a further 75 agents in virtual meetings the following week.

Once borders opened, media activity was ramped up in the key markets of Europe, UK, North America, Japan and New Zealand through TTNQ's first international search engine marketing campaign and the appointment of PR contractors to drive reach and consideration. This generated \$17M in media value in three months reaching an audience of 454,000.

Famil hosting picked up in the second half of the year as TTNQ supported more than 50 famils in partnership with TEQ and TA. Additionally, TTNQ launched a working holiday maker campaign in partnership with Global Work and Travel reaching 3M youth travellers in the UK, Ireland and Germany to drive consideration for Cairns & Great Barrier Reef and to help with the staffing struggles in region.

GLOBAL

- ATEC Virtual Meeting Place.
- ATEC Virtual Inbound B2B Meetings .
- TTNQ hosted REconnect and REengage Workshop Sydney.
- ATE 2022 and ATE Virtual .

CHINA

- TTNQ/ TEQ product updates livestreamed to 2,200 viewers.
- TTNQ Livestream destination training to 300 agents.
- Business Events Australia (BEA) seminars to 270 agents.
- BEA Showcase (Asia) - 25 meetings.
- Domestic Chinese Campaign with PTC Express Travel.
- Online promotions with 6RenYou and GorgeousRUN.
- WiFi advertising campaign and Chinese magazine promotion in Melbourne Metro.

WESTERN

- Europe sales trip.
- PR/Media contractor appointments in New Zealand, Germany, North America, USA.
- SEM campaigns in NZ, UK, Germany, North America.
- NZ Thrive Media campaign.
- DUE North America promotion.
- Go Australia Italy digital campaign.
- Flight Centre Destination Webinar.
- TEQ NZ Aussie Specialist training.
- TA Aussie Specialist Germany training.
- TEQ Queensland Spotlight Germany training.
- TEQ Queensland Spotlight UK training.
- TEQ Queensland Spotlight USA training.
- Organised 37 famils in region from April to June (23 media, 14 trade), 71 pax, 330 room nights and in excess of 200 product experienced.
- Working Holiday Maker campaign in UK, Ireland and Germany.

JAPAN AND SOUTH EAST ASIA

- Promotion with Japan's largest travel media platform ReTrip with TEQ.
- Commencing travel Meta Search Engine promotion prior to Jetstar's service relaunch.
- Provided 30+ virtual presentations for trade training sessions, travel shows and consumer events by working with airlines, trade partners, government and media.
- SEM campaign in Japan, driving to Japanese website.
- Appointed PR agency in Japan - YPC.
- Appointed travel influencer Ryman Traveler as Cairns and GBR Ambassador to attract consumers.
- JATA Online Travel Mart.
- BE Asia Showcase.
- Social media posts on FB/TW/IG.
- School group promotion with Study Cairns and TEQ.

DIGITAL REACH

HIGHLIGHTS

 **81.8M ORGANIC REACH (UP 144%)**

 **312K INDUSTRY REFERRALS (UP 39%)**

 **12 INFLUENCERS REACHING 1.8M+**

 **80+ NEW BLOGS & PAGES**

MARCH WAS A RECORD MONTH WITH 50,000 OUTBOUND REFERRALS FROM THE DESTINATION WEBSITE.

TTNQ'S ECO-ACTIVATION PARTNERING WITH CONCRETE PLAYGROUND AND THE QANTAS GREEN TIER

PROGRAM WAS A GREAT DRIVER TO THE STRONG REFERRALS FOR THE MONTH.

The destination's digital and social channels set records with very strong organic growth and an increase in paid marketing generating more traffic on the website than ever before. Once domestic borders were open there was a consistent high volume in web traffic, both paid and organic. As the weather cooled in the southern states, traffic grew with May and June the best performing months, generating 570,000 and 592,000 page views respectively and more than 250,000 users each month. This eclipsed the previous record set in May 2021 of 400,000 page views and 210,000 users.

With more than 80 new blogs and pages, organic user growth increased by 10% with about 60% of page views on the destination website from organic sources. Much of the web traffic was domestic, but there was some international growth when Australian borders opened. The total 1.9 million website users was up 50%, while the 4.8 million page views increased 75% from the previous financial year. There was more than 20% ranking growth on high-value searches and an average click through rate of 7.74% for paid searches. Members benefited with a record number of referrals jumping 39% to 312,000 including 62,000 from the destination's deals page.

Social media coordinators were appointed for the destination's Japanese and Chinese channels resulting in very strong reach in these key markets including an organic reach of 49 million on Chinese social channels. TTNQ's destination website and social channels generated \$3.12 million in advertising value equivalent, a 38% increase on the previous financial year.


TOTAL DESTINATION WEBSITE OVERVIEW (PAID AND ORGANIC)


1.91M
USERS
+49.6% YOY


1.79M
NEW USERS
+48.9% YOY


2.31M
SESSIONS
+47.4% YOY

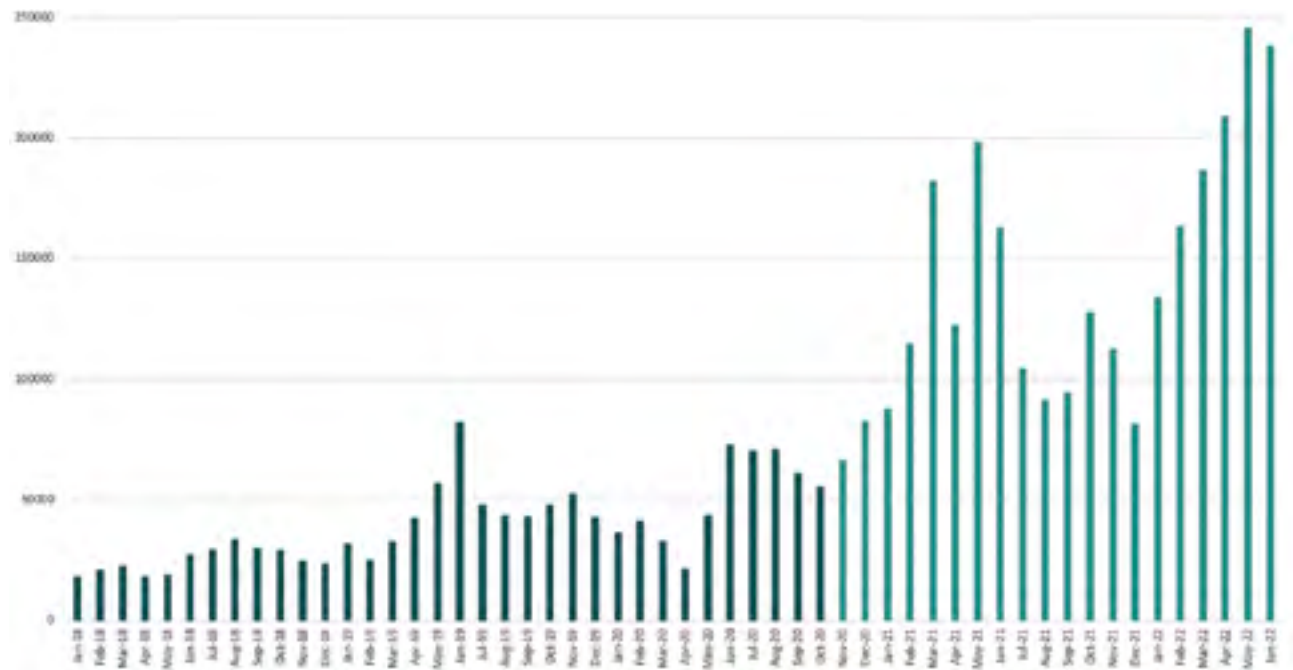

4.77M
PAGE VIEWS
+74.7% YOY


2.18M
PAGES/SESSION
+20.7% YOY


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AVG. SESSION DURATION

OVER 1.9M WEBSITE VISITORS IN 2021-22

300K in 2018, 450K in 2019, 520K in 2020



12 INFLUENCERS REACHING 1.8M+

<p>@ 232K FOLLOWERS</p> <p>@BRINKLEYDAVIES ECO-LUXURY CAMPAIGN (WITH @SALTYWINGS)</p>	<p>@ 159K FOLLOWERS</p> <p>@SALTYWINGS ECO-LUXURY CAMPAIGN (WITH @BRINKLEYDAVIES)</p>	<p>@ 20.8K FOLLOWERS</p> <p>@ALITTLEATLARGE FEAST OF THE SENSES & CASSOWARY COAST FOOD TRAIL</p>	<p>@ 81.9K FOLLOWERS</p> <p>@TRAVELPHOTOSKIWI NZ INFLUENCER</p>
<p>@ 100K FOLLOWERS</p> <p>@MYCOLOURFULWORLD_ YEAR OF INDIGENOUS TOURISM</p>	<p>@ 616K FOLLOWERS</p> <p>@RACHELWATTS AUTUMN, FAMILY INFLUENCER</p>	<p>@ 463K FOLLOWERS</p> <p>@SALTYLUXE ECO-LUXURY CAMPAIGN</p>	<p>@ 44.4K FOLLOWERS</p> <p>@D.MACK NZ INFLUENCER</p>
<p>@ 23K + 33.9K FOLLOWERS</p> <p>@OVERLANDTRAVELLERS DRIVE TNQ + DRIVE NQ (6 RTO PARTNERSHIP)</p>	<p>@ 22K FOLLOWERS</p> <p>@FUKUSHIMAWAKANA JAPANESE ATHLETE FOR IRONMAN</p>	<p>@ 11.9K FOLLOWERS</p> <p>@MAIMAIMAIMAIMA JAPANESE ATHLETE FOR IRONMAN</p>	<p>@ 13.7K FOLLOWERS</p> <p>@RYMAN_TRAVELER JAPANESE SOCIAL AMBASSADOR</p>

VISITOR SPEND



**\$124M VISITOR
SPEND FROM
CAMPAIGNS**

**A RECORD \$3B OF DOMESTIC OVERNIGHT VISITOR SPEND ELEVATED TTNQ
TO #6 REGION IN AUSTRALIA IN TOTAL VISITOR EXPENDITURE.**

Total visitor expenditure in Tropical North Queensland hit rock bottom in March 2021 at just over \$1.48B annual visitor spend, making our region the most impacted region in the nation. Our recovery since then has been nation leading, as the only region in Australia to add \$1.5B in total visitor spend, ahead of Sydney (\$1.35B), Gold Coast (\$1.28B) and Melbourne (\$1.1B). This outstanding result came about from strong destination marketing, a resilient industry and our region-wide dedication to growing our share of voice in both the media and through our retail partners.

An important figure to note is the significant increase in spend per night, up 23.3% since 2019, while visitor numbers are still 6.8% below pre-pandemic levels and visitor nights are back to 2019 levels from an increase in average length of stay of 5.8% to 5.2 nights. Our campaigns and retail partnerships, including our local and travel vouchers have driven more spend and longer stays, especially with our holiday travellers.

This increase has lifted our region from #11 in Australia in 2020 to #6 in Australia in total visitor spend, over regions including the Sunshine Coast, Perth, and the Hunter Valley.

KEY HIGHLIGHTS FOR 2021-22:

- The **fastest recovery** in domestic visitor spend in Australia, up \$1.53B since March 2021, to a record \$3B lifting our region to #6 nationally in total visitor spend.
- TTNQ-led campaigns delivered **\$124M in campaign generated visitor spend**, flowing through to over \$300M in regional expenditure from partner campaigns;
- \$100M+ in **visitor expenditure** generated through the Recovery for the Regions programs of the Federal Government through retail campaigns;
- An estimated **\$30M in business event delegate spend**, generated from winning close to 38% of the \$80M of bids, leads and referrals guided by TTNQ; and
- **Lifting our region's share** of total Queensland visitor expenditure (domestic and international) to 12.8% above our target of 11.4%.

NATIONAL VISITOR SURVEY YEAR END MARCH 2022 VS 2019



EXPENDITURE

\$3.0B +18.8%



VISITORS

2.1M -6.8%



VISITOR NIGHTS

\$10.8M +0.1%



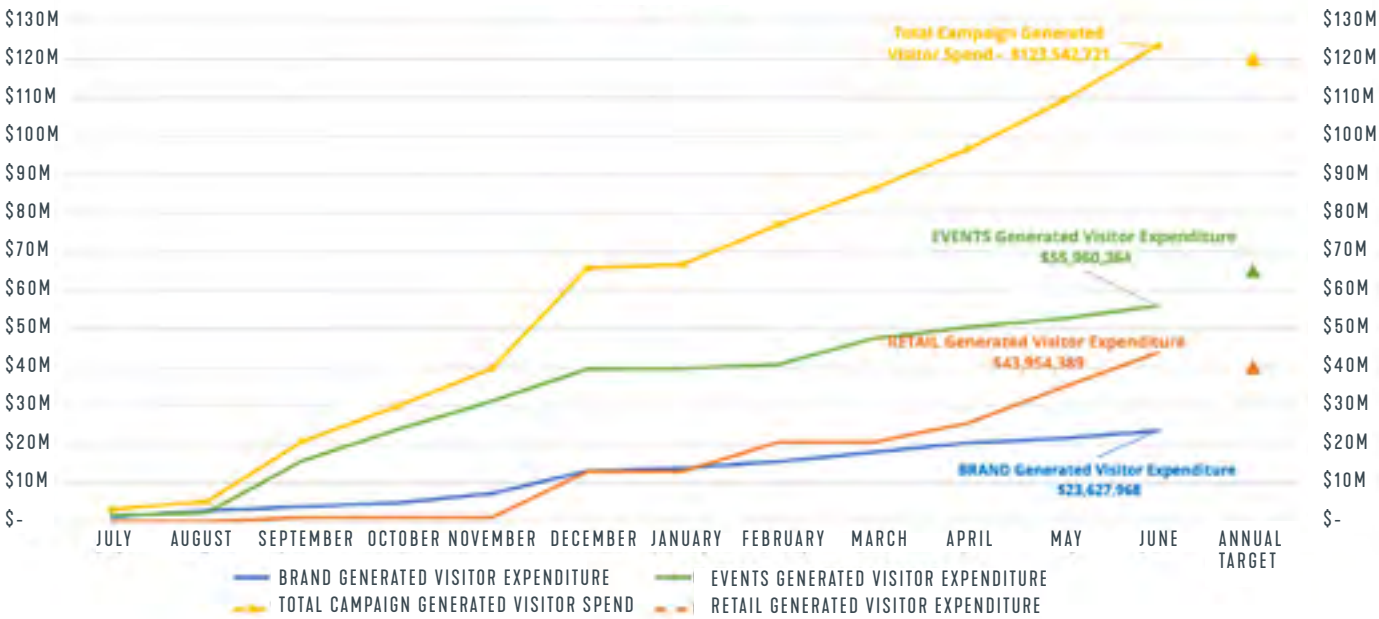
SPEND PER NIGHT

\$276 +23.3%



AVERAGE LENGTH OF STAY 5.2 NIGHTS +5.8%

CAMPAIGN GENERATED OVERNIGHT VISITOR SPEND 2021/22 (TARGET \$120M)



BUSINESS AND MAJOR EVENTS

CONFIDENCE RETURNED TO BUSINESS EVENTS WITH ALMOST HALF OF THE YEAR'S LEADS RECEIVED IN THE LAST QUARTER.



The Business Events Cairns & Great Barrier Reef team generated \$80M worth of new leads for the region, up \$64.4M from the previous financial year, showing confidence is returning. The number of confirmed events tripled with \$30M worth secured out to 2025. Clockwise Consulting were a valuable extension to the team, contributing \$4.2M to the total. They also introduced Cairns & Great Barrier Reef to corporate meetings planners who had not considered the region previously, and qualified them to attend our education programs.

Activity focused on the domestic market with content published monthly across the website, socials, EDMs and paid industry publications. Bang Media managed SEO and SEM activity to boost website visitation and reduce bounce rates. Silky Oaks Lodge, Reef Magic, Lizard Island and Cairns Convention Centre featured in the Business Events Australia's international publication Australia Next.

With travel restrictions lifting at the start of 2022, business event tradeshow activity resumed:

- February – Get Local 2-day Sydney event with 10 BE companies.
- March – AIME 3-day event in Melbourne with 10 BE companies.
- April – Supported Crystalbrook Riley with flights for 7 meeting planners.
- May – Supported Cairns Convention Centre Discover Cairns for 3 association planners.
- May – Hosted 8 association and corporate meeting planners.
- June – Hosted 13 buyers and two media from USA and UK in partnership with Business Events Australia.
- January-June – Hosted 12 site inspections for clients with open leads looking to confirm events into the destination.

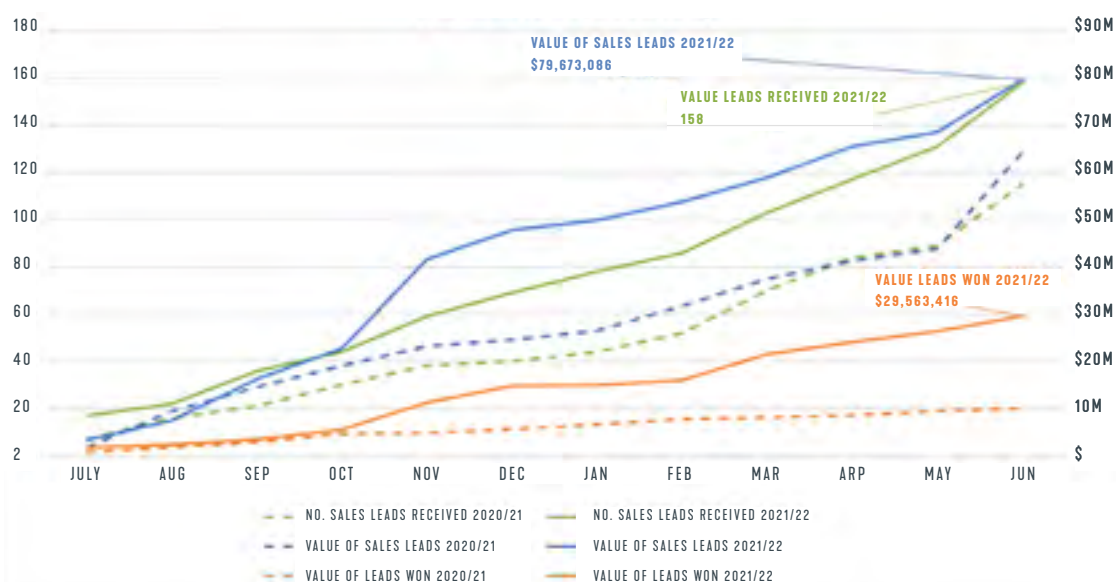
ECONOMIC CONTRIBUTION OF BUSINESS EVENTS

- 183 events
- 14,889 delegates
- 46,571 delegate days
- Direct economic value of \$20M
- Indirect economic contribution of \$60M

BUSINESS EVENTS ACTIVITY

- 158 new leads worth \$80M
- 61 confirmed events worth \$30M
- 28 referrals worth \$5M

BUSINESS EVENTS: SALES LEADS YTD 2021/22 VS 2020/21 (NUMBER OF LEADS AND VALUE OF LEADS)



LEISURE EVENTS

There was a full calendar of leisure events for 2021-22, however, border closures affected attendance at events from July to December. In June Ironman Asia-Pacific had record attendance demonstrating the pent-up demand for events.

With the assistance of grant funding from the Australian Government under the Recovery for Regional Tourism program administered by Austrade, TTNQ was able to optimise marketing activities to drive attendance from interstate markets for Savannah in the Round, Taste Port Douglas, Cairns Indigenous Art Fair, Port Douglas Hot and Steamy, Port Douglas Carnivale and Outback by the Sea with some great results including:

- Savannah in the Round attracting more than 4,000 unique visitors with 83% staying overnight.
- Port Douglas Hot and Steamy provided a much needed boost to Port Douglas accommodation in February and is set to be even bigger in 2023 ahead of World Pride being held in Sydney in March 2023.

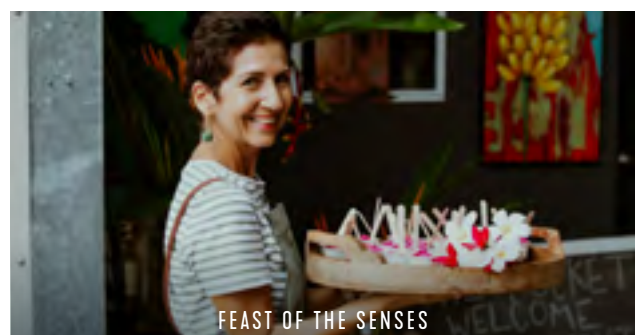
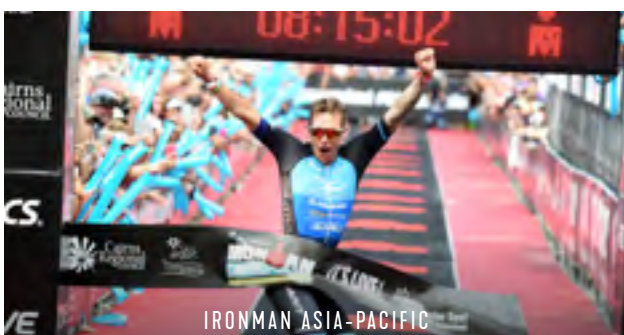
Two new events were secured with the funding which enabled Cairns to host the AFL Premiership match in April attracting more

than 6000 spectators and to bring Crankworx to Cairns in October 2022 and May 2023.

Local events also benefitted with the funds used to deliver an events masterclass for local event organisers and local government events staff on best practice in delivering regional events. More than 40 people attended the class. Economic impact studies will also be undertaken for six smaller events to assist them to access local government and TEQ regional event funding in the future.

MAJOR EVENTS

- Cairns Amateurs – September
- 7 Cairns Marathon – September
- Savannah in the Round – October
- Grass is Greener – October
- Cairns Indigenous Art Fair – November
- Cairns Summer Sounds – February
- Hot and Steamy – February
- Feast of the Senses – March
- AFL Premiership match – April
- Port Douglas Carnivale – May
- Red Hot Summer Tour – May
- Ironman Asia-Pacific – June



SUSTAINABLE GROWTH



CLIMATE ACTION PLAN
IN DEVELOPMENT



FIRST NATIONS TOURISM
ACTION PLAN UNDERWAY

SUSTAINING TTNQ

The organisation maintained a \$16.2M operational budget in 2021/22, up from \$13.5M in 2020/21 with a greater investment in Partnerships and Events, including our significant retail and aviation campaigns and support for major and regional events boosted by the Federal Government's Recovery for the Regions funding.

This allowed TTNQ to significantly increase our cooperative marketing partnerships, while maintaining membership revenue. Project funding from Cairns Regional Council in Business Events and the upcoming Crankworx mountain-biking event will drive the region's growth in the year ahead.

TTNQ INCOME 2021-22 (VS 2020-21)

	21-22	20-21
MEMBERSHIP AND COOP MARKETING	31.5%	18.6%
CAIRNS REGIONAL COUNCIL	25.4%	19.4%
STATE GOVT (INC. TEQ)	22.7%	22.5%
FEDERAL GRANT	20.5%	39.6%

TNQ EXPENDITURE 2021-22 (VS 2020-21)

	21-22	20-21
MARKETING	64.4%	70%
ADMINISTRATION	17.8%	16%
PARTNERSHIPS AND EVENTS	13.4%	6.8%
INDUSTRY SUPPORT	4.3%	7.4%

SUSTAINING OUR REGION

TTNQ commenced two important projects for our region in 2021-22, the Climate Action Plan for our region as part of a state-wide funding program, and supporting the First Nations Tourism Action Plan being developed by the all-Indigenous Steering Committee. Both are due for completion in 2022-23.

The organisation also oversaw the final milestone in the State Government grant managed by TTNQ for the Mandingalbay Yidinji Aboriginal Corporation new pontoon, jetty and 53 seater vessel as part of their new Indigenous experience on Hills Creek, East Trinity. This exciting new project is a great addition to the region's Indigenous experiences which have grown through the support of the State Government's Year of Indigenous Tourism funding, and the finalisation of the Connecting with Asia program both of which were completed this year.



SUPPORTING OUR MEMBERS

As the region came back into business full membership fees were charged and TTNQ achieved the retention target of 85% with 528 members bringing \$548,000 in revenue. Our strong advocacy for the industry resulted in a 6% increase in member satisfaction to 92%.

The annual TTNQ Tourism Conference was held on 16 June with over 150 members attending.

Members also benefitted from the grant funding from the Australian Government under the Recovery for Regional Tourism program administered by Austrade. The Create Great content program to assist with website and content development and the Best of Queensland mentoring programs to improve BOQ scores were run with this funding.

TNQ operators once again topped the State in the Best of Queensland Experiences program with an average GRI score of 89.17, above the State average of 88.0. We saw a significant growth in new listings, with 145 new products added, bringing TNQ to third place in the State with 603 listings. Congratulations to Mt Mulligan Lodge who was identified as one of the top performers in the State with a perfect 100 score!

MEMBER FUNCTIONS

COVID-19 forced the cancellation of a number of member events, but the following networking events proceeded.

- 15 September – Wharf One
- 3 November – Shangri-La (TEQ joint event)
- 1 December – Palmer Sea reef Port Douglas (TPDD joint event)
- 8 December – Coral Expeditions
- 9 March – Hilton Cairns
- 6 April – Pier Bar
- 16 June – Pullman Cairns International (TTNQ Tourism Conference)

Events were also held in Mission Beach, Trinity Beach and Palm Cove for the LTO/ LTA members.

MARKETING RETURN ON INVESTMENT

Partner and co-operative marketing income exceeded the organisation's expectations, boosted by the contribution of aviation and retail partners to campaign activities underpinned by the Recovery for the Regions Federal funding. A total of \$2.87M of cooperative marketing income, along with \$550,000 of membership funds were secured by TTNQ this year. These funds were invested in campaign activities that delivered more than \$300M in regional visitor expenditure, a return on investment of \$87:1.

INDIGENOUS TOURISM

TTNQ continued its support of the TNQ Indigenous Experiences Cluster which met monthly throughout the year, and grew from 168 members to more than 300 members in 2021-22. More than 45 Indigenous products and experiences are now ready for domestic and international marketing, up from 32 products in 2020-21.

The region's Deeper into Dreaming trade publication was reprinted and 14 Indigenous experiences were mentored with the support of the Year of Indigenous Tourism funding from the Queensland Government.

The funding was also used for an educational program to train TNQ tour desks in Indigenous products was conducted. TTNQ includes Indigenous experiences in all of its campaign activity, including brand, retail and tactical campaigns as well as including Indigenous experiences in every famil program.

Five Indigenous products attended the Australian Tourism Exchange this year and TTNQ continues to support the preparation of the region's First Nations Tourism Action Plan which is being led by the all-Indigenous Steering Committee.

SUSTAINABILITY

Our marketing activities took a stronger focus on sustainable travel than ever before, with our Qantas Green Tier marketing partnership, support of our regions and operators to gain eco-certification and continuing to engage the consumer with our stories of eco-luxury travel experiences.

Cairns & Great Barrier Reef was recognised in recent state-wide brand research as the destination with the greatest commitment to ecotourism and sustainable travel in Queensland by Australian consumers. Work is continuing on our 'Leave Greater' brand platform including expansion of our brand story and efforts towards a promise of a greater good.

Cairns & Great Barrier Reef has an opportunity through our work in eco-accreditation, responsible luxury and restorative tourism experiences to be a world-leader, and TTNQ is committed to mapping our pathway to net zero emissions before 2050.

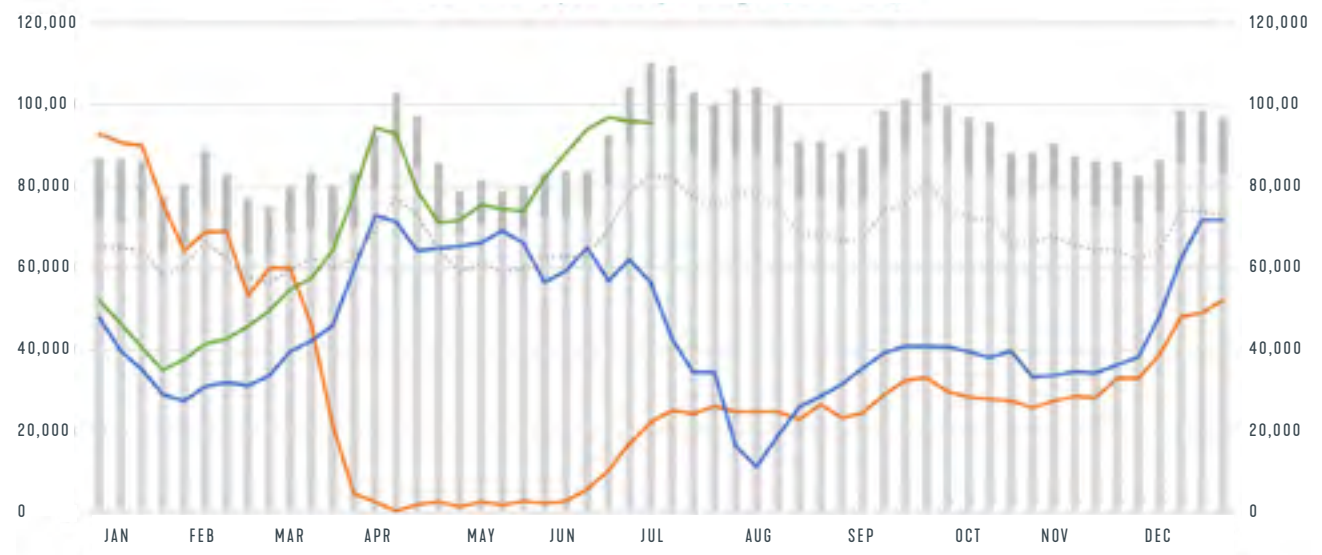
Watch this space in 2022-23.



AVIATION

Passenger numbers through Cairns Airport returned to 86% of pre-Covid numbers with 2.69M people passing through both terminals, compared to 5.08M in 2018-19. Just 21,253 people passed through the international terminal with our first direct international flight from Singapore returning in March with the three flights a week increasing to five in May.

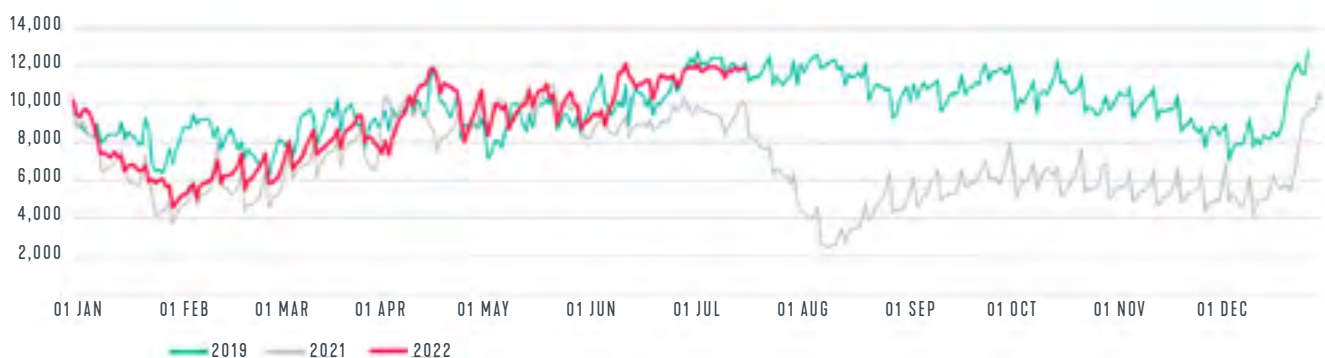
TOTAL CAIRNS AIRPORT WEEKLY PASSENGERS (2019-22)



ACCOMMODATION

The average occupancy rate was 6.3% above 2019 with strong forward bookings. In June 2022 the average daily rate had increased to \$249.55 from a low of \$171.24 in November 2021. The revenue per available room was \$192.52, up 42.5% from the previous June for the supply of 422,310 room nights.

ACCOMMODATION OCCUPANCY (2019-22)



PERCENTAGE CHANGE IN DEMAND (COMPARED TO 2019 LEVELS)



SATISFACTION

VISITOR SATISFACTION

Visitor satisfaction measured through the destination sentiment index is up significantly from the previous financial year from 29% to a 30% average across 2021-22 financial year; 5 points above our target. June 2022 ended with a Net Promoter Score of 34 for Tropical North Queensland, which sits as a high Global Tourism Sentiment comparison; key positive consumer sentiment drivers being our reef and wildlife experiences.



NET PROMOTER SCORE
35% (TARGET 30%)



MEMBER SATISFACTION
92% (UP 6%)



100% SATISFACTION WITH
E-COMMUNICATIONS

TOURISM SENTIMENT INDEX – TROPICAL NORTH QLD VS GOLD COAST 2021-22



HOW DID WE PERFORM IN 2021?



92%

ARE SATISFIED
WITH THEIR TTNQ
MEMBERSHIP

6% INCREASE
ON LAST YEAR



89%

ARE SATISFIED WITH THE
STRATEGIC DIRECTION
AND CAMPAIGN ACTIVITY

VS 88% LAST YEAR



100%

FIND OUR
E-COMMUNICATIONS
USEFUL

100% FOR 2 YEARS
RUNNING



94%

ARE SATISFIED WITH
THE ADVOCACY
ROLE OF TTNQ

SATISFACTION HAS
REMAINED THE SAME

2022 MARKETING OPPORTUNITY PRIORITIES

- 1 MEDIA AND PR OPPORTUNITIES
- 2 BEST OF QUEENSLAND PRODUCT DEVELOPMENT
- 3 SOCIAL INFLUENCER PROGRAM
- 4 RETAIL AND TRADE PARTNERSHIPS

TOP THREE NICHE MARKETS



1 DRIVE



2 ECO-LUXURY



3 YOUTH AND ADVENTURE



89% OF OUR MEMBERS FIND THE MARKETING CO-OPERATIVES RELEVANT AND EASY TO ACCESS! 9% MORE THAN LAST YEAR!

INTERNATIONAL MARKET PRIORITY RANKINGS



1

EUROPE



2

NORTH AMERICA



3

UK



4

NEW ZEALAND



5

JAPAN

MEMBER BENEFIT PRIORITY RANKINGS



1

ACCESS TO
MARKETING CO-OPS



2

PRODUCT LISTING
ON WEBSITE



3

ACCESS TO PR AND
MEDIA ACTIVITY



4

INDUSTRY
E-COMMUNICATIONS



5

PARTICIPATING IN
EDUCATIONALS

PARTICIPATING IN MARKETING CO-OPERATIVE OPPORTUNITIES IS AVAILABLE FOR PARTNER OF TOURISM LEVEL AND ABOVE.
ENHANCE YOUR WEBSITE LISTING BY PARTICIPATING IN OUR SPECIAL OFFERS CAMPAIGN ON OUR [DEALS PAGE](#), AVAILABLE FOR ALL MEMBERS.

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

Incredible work by the TTNQ team over the past couple years. Amazing to have you all in our corner through Covid and everything else. Can't thank you enough.

Despite the ever-changing conditions, the strategic direction has been clear and reasoned and the campaigns creative and agile.

The team are great and always go above and beyond!

Leadership and Communication provided has been exemplary during this difficult time

The advocacy that has been provided by TTNQ over the last 12-18 months has been exemplary and the organisation should be congratulated.

Brilliant leadership from Mark, and across the team. Very satisfied with the co-op opportunities we've been presented.

Looking forward to opening up and welcoming back our much needed domestic and international tourists and basically giving them the best service; we have missed them so much!

”

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 (JULY TO OCTOBER)

SOUTHERN ZONE DIRECTOR

Paronella Park, Director Marketing and PR

CRAIG BRADBERY

GENERAL DIRECTOR

Silky Oaks Lodge (Baillie Lodges) , CEO

JANET HAMILTON

CAIRNS SOUTH ZONE DIRECTOR

Cairns Convention Centre, General Manager

PAUL FAGG (JULY TO OCTOBER)

TROPICAL TABLELANDS AND 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 (JULY TO OCTOBER)

GENERAL DIRECTOR

The Accommodation Centre, Destination Cairns
Marketing, General Manager Commercial

BEN WOODWARD

GENERAL DIRECTOR

The CaPTA Group, Director of Sales and
Marketing

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 and Company Secretary

ROSIE DOUGLAS

TTNQ, General Manager – Partnerships and
Events

TRACY HAY

(REPLACED ROSIE DOUGLAS FROM MAY 2022)

TTNQ, Manager – Corporate Services and
Company Secretary

JOANNE PARISI

(REPLACED LUCKBIR SINGH FROM NOV 2021)

MacDonnells Law, Director

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 and Company Secretary

TRACY HAY





TTNQ, Manager – Corporate Services and
Company Secretary

Note: Brian Arnold was elected to the board in October 2021 but resigned due to personal reasons in March 2022.



VISIT OUR CHANNELS




CONSUMER

 @tropicalnorthqueensland
 @tropicalnorthqueensland
 @cairnsGBR
 tropicalnorthqueensland.org.au
#EXPLORETNQ #EXPLORECAIRNSGBR

BUSINESS EVENTS

 @businesseventscairnsGBR
 @meetincairnsGBR
 @meetincairnsGBR
 businesseventscairns.org.au
#MEETINCAIRNSGBR

CORPORATE

 @ttnq-industry
 tourism.tropicalnorthqueensland.org.au
 Tourism Tropical North Queensland (TTNQ)