

TOURISM
TROPICAL NORTH
QUEENSLAND

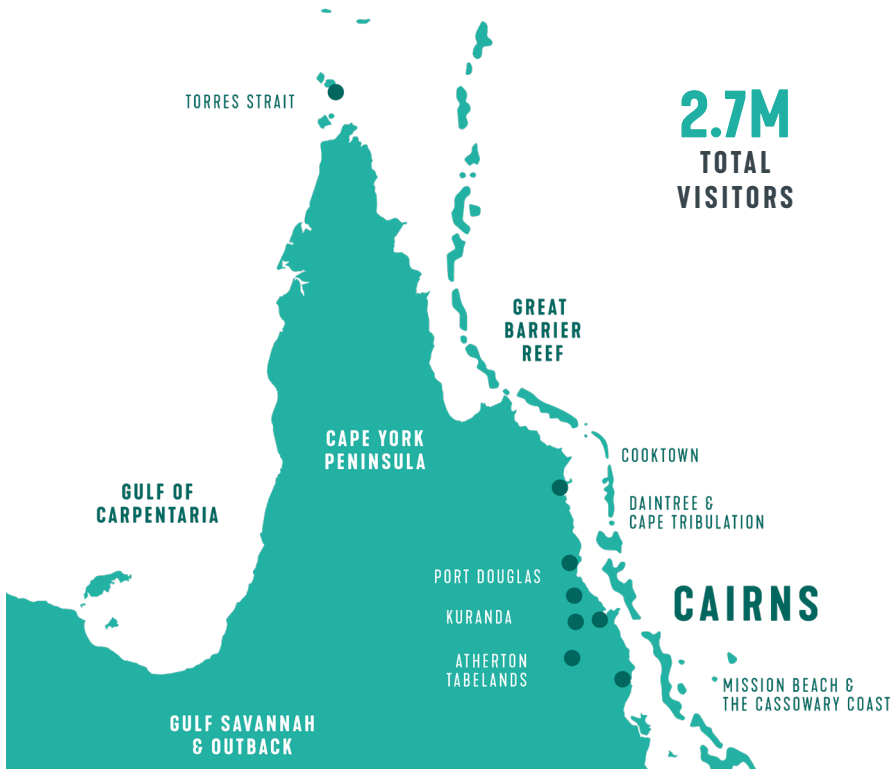
TROPICAL NORTH QUEENSLAND DESTINATION MANAGEMENT PLAN 2032

OCTOBER 2024



A PLAN TO GUIDE OUR VISITOR ECONOMY TOWARDS 2032 AND BEYOND

ABOUT TNQ IN 2024



2.7M
TOTAL VISITORS

17M
VISITOR NIGHTS

32%
INTERNATIONAL VISITOR NIGHTS

\$4.6B
TOTAL EXPENDITURE

29,300
TOTAL JOBS

1.2M
HOLIDAY VISITORS

#2 DESTINATION FOR SPEND PER TRIP **\$1700** EACH

TTNQ acknowledges that all tourism in Tropical North Queensland is on Country.

We acknowledge the spirit of Country and Aboriginal and Torres Strait Islander peoples as carrying custodial responsibility. We pay our respect to the Ancestors and Elders, past and present.

We recognise the deep relationships, connections and responsibilities to lands, waters and skies integral to First Nations Peoples' identity and culture and we give regard to their connections as central to Culture and being.



ACKNOWLEDGEMENTS

TTNQ acknowledges the assistance of David Inches, Krista Hauritz and Peter Faulkner in the preparation of this Plan and the contribution of the Department of Tourism and Sport in developing the regional forecast models for the Towards Tourism 2032 targets.

EXECUTIVE SUMMARY

BY 2032 TROPICAL NORTH QUEENSLAND WILL BE AUSTRALIA'S #1 TROPICAL HOLIDAY DESTINATION AND A WORLD LEADER IN SUSTAINABLE AND REGENERATIVE TOURISM SUPPORTING THRIVING LOCAL COMMUNITIES.

Tropical North Queensland (TNQ) is best known for the World Heritage-listed Great Barrier Reef and Wet Tropics Rainforests, the Tablelands, Gulf Savannah, Cape York Peninsula, and the islands of the Torres Strait. There is however so much more to explore in the Tropical North, this Destination Management Plan to 2032 seeks to find the balance of sustainable growth and the aspirations of our communities, to disperse the benefits of the visitor economy.

As Queensland looks towards 2032 and plans the runway to and legacy from the Olympic and Paralympic Games this plan aims to position Tropical North Queensland as a key region in achieving the State's aspirations Towards 2032 and beyond. The TNQ 2032 Destination Management Plan sets out how the region aims to achieve its Strategic Priorities of being:

OUR AMBITIOUS TARGET IS THAT IN 2032 TNQ WILL BE A:

\$7.5B
visitor economy, supporting

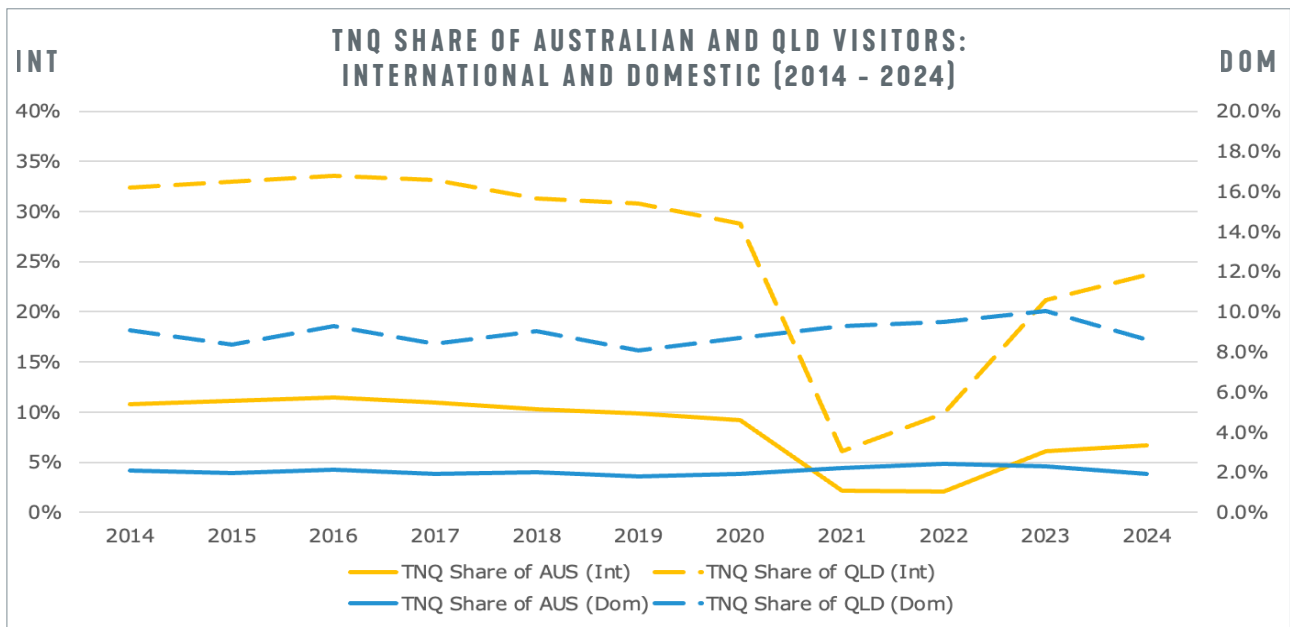
12,500
extra jobs in our region, and contributing an extra

\$780M
in additional tax revenue per annum in 2032 (from \$1.4B in 2024)

1. A **globally sought-after destination** attracting Experience Seekers and conscious travellers;
2. A **year-round visitor economy** that disperses the benefits regionally;
3. Global leaders in **sustainable and regenerative** tourism;
4. New and enhanced **visitor experiences and events**; and
5. A **balance of tourism growth** with the needs and aspirations of our communities.

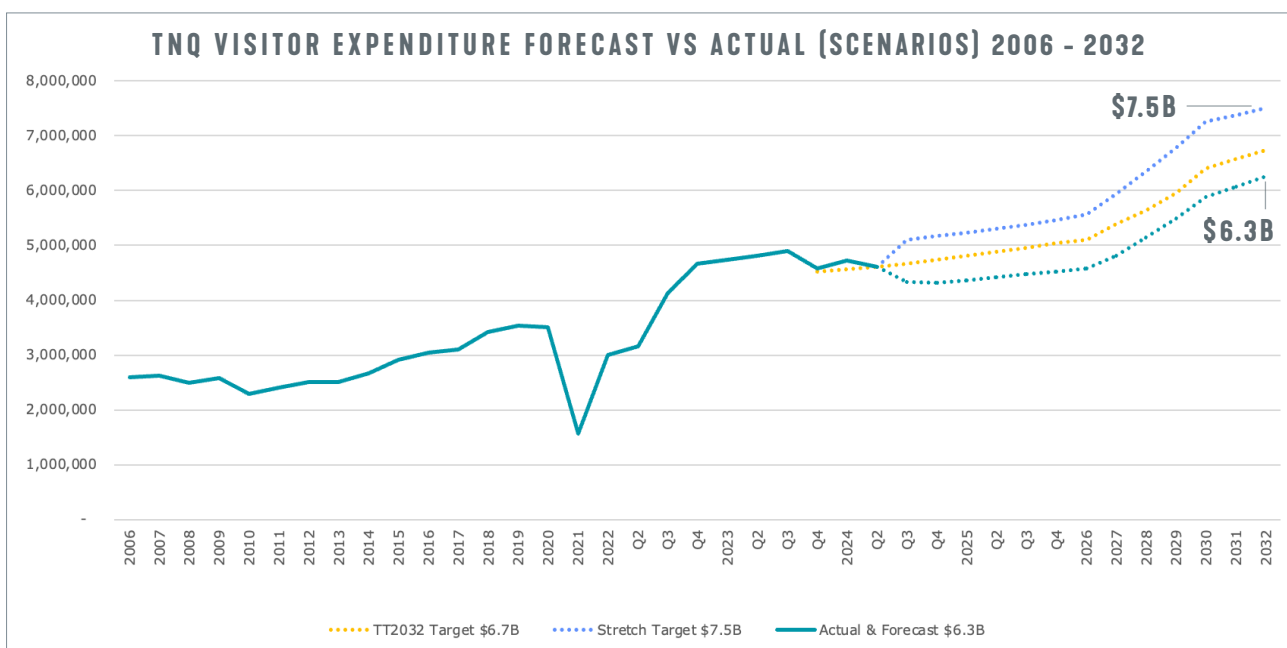
This will require significant additional investment in our region, strong leadership supporting a well-resourced and strategically focussed tourism network, striving towards global recognition as a leading sustainable and inclusive destination where visitors are dispersed to maximise the benefits for our local communities, and delivering remarkable experiences that leave our visitors, our communities and the natural environment 'greater'.

The past decade has seen the region lose domestic (blue lines) and international (yellow lines) market share (see graph below). The region gained domestic share with increased funding for COVID recovery (2021-23), and is gaining share internationally with the International Tourism Recovery funds (2023-25), particularly our share of Queensland visitors (dashed lines).



The targets in Towards Tourism 2032 (TT2032) and the key State and Regional tourism and economic development plans have set the foundations for the TNQ 2032 Destination Management Plan, following extensive consultation across the region it will be supported by an Implementation Committee to ensure tourism remains in balance with the region’s community, economic and environmental aspirations.

If the aspirations of Towards Tourism 2032 are achieved, and Tropical North Queensland maintains its share of domestic and international visitors to Queensland, the region is forecast to reach \$6.7B in total visitor expenditure (see graph below). On the current funding model and the trends of the decade leading into 2020, the region is forecast to reach \$6.3B of total visitor spend in 2032. If the region can deliver on the aspirations outlined in this plan it can reach \$7.5B in total visitor expenditure in 2032, with spend forecast to grow faster than numbers.



What will drive our growth beyond the TT2032 target (\$6.7B per annum) to our stretch target is:

1. Securing additional **direct aviation routes**, domestically and internationally and increasing investment in destination marketing to drive the required demand;
2. Holding our domestic market share, **growing interstate holiday nights from key segments** including business events, sustainability, wellness, adventure and nature-based tourism;
3. Increasing our **share of the national touring drive market and cruise passenger markets** and increase dispersal, especially in the shoulder-seasons;
4. Be the national leader in **regenerative tourism**, growing our share of key international ‘conscious-travel’ markets seeking to avoid contributing to over-tourism and connecting visitor to Country with the most Indigenous Experiences of any destination;
5. **Leverage events** and key international and ‘travel for a purpose’ segments to travel in shoulder seasons to support a year-round visitor economy with regional dispersal;
6. **Attracting investment** in new experiences, accommodation and core infrastructure to grow our share of key international markets and increase their stay and spend; and
7. Supporting programs and policies that build career pathways and attract, retain and house **skilled workers** including growing our share of the national market for **international education**.

THE TNQ 2032 DESTINATION MANAGEMENT PLAN OUTLINES A COMPREHENSIVE APPROACH TO ACHIEVING THESE GROWTH STRATEGIES, INCLUDING SPECIFIC ACTIONS ACROSS OUR SUB-REGIONS, BUT THESE CAN BE SUMMARISED IN FIVE GAME CHANGERS AND FIVE KEY ENABLERS OF SUCCESS.

GAME CHANGERS



DIRECT AVIATION

Leveraging our proximity to Asia as the northern gateway to Australia, & increased domestic linkages



BUSINESS & MAJOR EVENTS

Could double in value for our region supporting aviation, trade, investment & liveability benefits.



THE GREAT BARRIER REEF

Leverage the 2032 Olympic & Paralympic Games & our global reputation with additional funding & playing our part in protecting the Great Barrier Reef.



EXPERIENCE DEVELOPMENT

Innovation by the industry in the experience and adoption of new technology, to share our unique story, especially our rainforest story.



FACILITATING INVESTMENT

A coordinated & proactive approach to facilitating investment in new experiences & low carbon future.

ENABLERS OF SUCCESS



FIRST NATIONS TOURISM

Implementation of our First Nations Tourism Action Plan to increase our market share, & be a leader in First Nations experiences & employment.



ENABLING INFRASTRUCTURE

A significant increase in tourism infrastructure & the enabling infrastructure (transport, water, digital) & a policy framework that underpins this growth.



TALENT AND SKILLS

Ensuring the region has the talent and skills needed to meet the expectations of future travellers requires a more coordinated approach.



OUR PATHWAY TO NET ZERO

Our industry is committed sustainable practices & the pathway to reaching net zero by 2050.



SUSTAINABLE FUNDING

Without sustainable funding to drive the priorities outlined in this Plan it cannot be achieved, including consideration of funding models such as user pays.



A DESTINATION WHERE VISITORS SEE GREAT, AND LEAVE GREATER

CONSUMER

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BUSINESS EVENTS

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CORPORATE

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Tourism Tropical North Queensland (TTNQ)

The key to our regions success is to grow the type of tourism our communities seek in 2032, that is to attracts visitors are conscious of their impact and leave as custodians of the region and its stories, recognising our First Nations connection and that all tourism is on Country; play an active role in protecting and restoring Country through sustainable and regenerative tourism practices to ensure our natural environment is healthy; foster tourism that respects culture and communities and encourages an authentic connection of people with place and an industry that embraces diverse voices; and by supporting an industry that is well-informed, inclusive and accessible, supporting vibrant communities and a highly-skilled local workforce; and delivers truly remarkable visitor experiences.