

Tourism Strategy

FOR THE REDLANDS

2010 – 2014



INTRODUCTION	3
UNDERSTANDING THE STRATEGIC CONTEXT	5
OUR VISION FOR TOURISM	6
Our Goals	6
Our Values	6
TOURISM IN THE REDLANDS	7
Visitation	7
Product Investment and Growth	8
Infrastructure and Services	9
Brand Positioning and Marketing	10
UNIQUE SELLING POINTS	12
THE TARGET MARKETS	13
OUR PRIORITIES	16
TWELVE PRIORITY PROJECTS	22
IMPLEMENTING THE STRATEGY	23
Measuring Our Success	23
Strategy Enablers	23
Action Plan	24
APPENDIX 1: SWOT ANALYSIS	28
APPENDIX 2: NEW PRODUCT OPPORTUNITIES	30



INTRODUCTION

Tourism for the Community and Economy

Tourism in the Redlands supports a range of vital community services and contributes an estimated \$50M into the regional economy and based on State estimates for job creation supports over 750 jobs¹. In addition to the economic benefits tourism supports a wide range of community services from transport, to retail, dining and entertainment that might not otherwise be provided. The residents of the City of Redlands see nature-based tourism as a key part of their economic and community future. The key is to find the balance between conservation and growth, and for the Redlands that may be in education.

A Sustainably Managed Nature Playground

Over 50% of the area of the Redlands is protected to conserve a range of nationally important natural and cultural assets. As part of Brisbane's Moreton Bay & Islands the region is firmly committed to the principles of sustainable tourism and community engagement having instigated a wide range of Plans which embodied the principles of sustainable development. This commitment to environmental sustainability is set against an ambitious target of growing the local workforce by 23,500 over the next two decades and reversing the trend of residents travelling out of the region for work.

Tourism is a driver of regional economic development and a source of economic renewal however needs the full support of local stakeholders. The need for a clear, concise and consultative tourism, economic development and marketing plan has been identified in order to develop the Redlands as Brisbane's sustainably managed nature playground.

Tourism in the Redlands contributes an estimated \$50M into the regional economy and supports over 750 jobs.

Strategy Development

Redland City Council commissioned EC3 Global to develop a four-year Tourism Strategy for the City to support a unified long term approach to tourism development and marketing. Through a consultative approach the strategy seeks to establish a stronger linkage between economic development and tourism within the region to ensure the region can deliver manageable growth and job creation without threatening the delicate natural and cultural balance.

The *objectives* of this plan are to:

- **Establish a clear vision** for tourism in the Redlands;
- **Align the strategic priorities** of Council and Industry;
- Analyse opportunities for **infrastructure development**;
- Analyse opportunities for **product and industry development**;
- Identify and prioritise **strategies and actions for development**; and
- Identify key **marketing actions**.

The recommendations made in this report focus on delivering the following *goals*:

- Improve the **lifestyle and amenity** of the region for locals;
- Extend market share, length of stay and the **value of tourism** to the Redlands;
- Build a positive **image for the region** and support the local way of life;
- Establish a **positive climate** for sustainable development through town and strategic planning;
- Meet and **exceed our customer expectations** for tourism products, experiences, services and facilities;
- Improve **advocacy** through the development of industry, government and community partnerships; and
- Identify a **long term strategic approach to marketing** the Redlands.

"Our beautiful physical environment and cultural heritage position the Redlands as a destination of choice and shape educational ecotourism experiences which support community, environmental, indigenous and economic aspirations." **Redlands 2030 Plan**

¹ Source: EC3 Global estimates based on NVS, IVS and Tourism Satellite Accounts (2009)

The Tourism Strategy for the Redlands was developed through broad stakeholder consultation and in-depth analysis. A Tourism Vision Group and Stakeholder Reference Group were established to provide guidance and input throughout the project with representation across industry and Government.

Where Tourism Makes the Difference

The Redlands will experience a number of challenges in the coming decade, from attracting appropriate investment to increasing local employment, supporting viable economies on the islands, ensuring the lifestyle and environment that makes the region so special are in fact enhanced, and ensuring the region does not lose its unique identity through the urban expansion of Brisbane City. Tourism is collectively important for a sense of identity and community lifestyle. Tourism as an industry is uniquely placed to encourage investment with a nature-based focus, create local employment, support the island economies, create a better lifestyle for local people and clearly differentiate the region from other Bay and Island destinations and Brisbane.



Major Initiatives Supporting Tourism

Outlined below are identified initiatives that are planned or underway and impact on tourism in the region:

- Opportunities associated with the bid for the 2018 Commonwealth Games
- Southern Moreton Bay Islands are looking for new ways to grow and develop
- Cleveland and Capalaba Master Plans
- Access and transport improvements
- Investment in parks and open spaces and conservation parks
- A strong focus on cultural and heritage stories including the Quandamooka country
- Encouragement of outdoor and active lifestyle including the development of walking tracks

UNDERSTANDING THE STRATEGIC CONTEXT

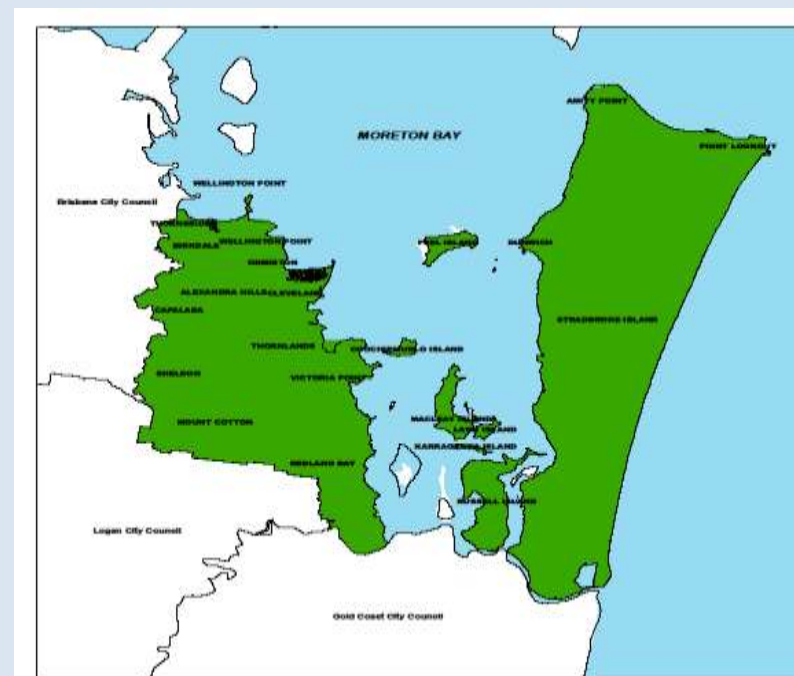
The success of the Redlands as a tourism destination will depend on the success (or otherwise) of the broader 'Moreton Bay and Islands' tourism destination in Brisbane. The regional context will have a significant impact on the viability of tourism (and other industries) in the region.

Through a review of existing Strategies, Plans and Reports a number of key trends and developments emerge that will influence the region's appeal as a tourism destination and include:

- Expiration of the **mining leases** making 80% of North Stradbroke Island a National Park by 2027;
- The rapid **population growth in South East Queensland** over the next two decades (1.82% per annum) will support natural visitor growth;
- The new approach by Tourism Queensland and Brisbane Marketing to the **Moreton Bay and Islands**;
- The **education sector** is emerging as one of the fastest growing segments of international tourism and Brisbane has been growing its market share;
- The effects of the **Global Financial Crisis (GFC)** continue to have an impact on private sector investment;
- The 'eco tourism' or **nature based tourism** market is remaining steady;
- The international market has grown despite recent declines in overall visitation to Australia with expenditure approximately 11% more per day than the average domestic visitor;
- The **2030 Community Plan and the 2010 Corporate Plan** for the Redlands strongly supports the growth of nature-based and ecotourism in the Redlands; and
- Implementation of the **Cleveland and Capalaba Masterplans** will provide a catalyst for growth in the region.
- Acknowledgement of **indigenous custodianship and native title** on North Stradbroke Island.

In addition to those identified in the box to the right, are a number of national documents including the National Long-term Tourism Strategy and the Tourism and Transport Forum's review of tourism investment which both identify areas such as Brisbane's Moreton Bay and Islands as destinations with enormous potential and natural advantage.

Figure 1: Redlands Region



Tourism in the Redlands is influenced by:

- South East Queensland Regional Plan (2008)
- Queensland Tourism Strategy (2006)
- Brisbane Destination Management Plan (2008)
- Brisbane Regional Tourism Investment and Infrastructure Plan (2008)
- Redland City Economic Development Strategy (2008)
- Redlands 2030 Community Plan (2010)
- Redland City Council Corporate Plan (2010)
- Redlands Festival & Events Strategy (2008)
- Redland Bay Foreshore Plan (2009)

The Strategy seeks to leverage, not recreate, these strategic documents highlighting short to medium term opportunities in the region.

The Redlands region, including the Moreton Bay Islands, has considerable development and investment potential for tourism.

OUR VISION FOR TOURISM

‘Redlands is the most accessible, diverse and protected nature playground within Brisbane’s Moreton Bay & Islands’

Our Goals

The aim is to overcome the actual and perceived barriers to growing visitation to the region and increase the value of tourism to the community. In this way tourism needs to take **‘LEAPS’** not just small steps towards its vision of sustainability in the following ways:

LEADERSHIP – the industry is fragmented and needs to come together under one structure. Council needs to play a role in building trust and increasing participation. This begins by getting Council staff out into the community and accessible.

EMPLOYMENT – there is a need to reverse the trend of declining visitation and the jobs it supports with a focus on growing awareness and the average spend per day with innovative product and industry development.

ACCESSIBILITY – perceived barriers to visitation (distance, cost, lack of product) need to be addressed through greater participation in marketing to increase our share of voice

PLANNING – tourism needs to be a part of key planning decisions such as the Cleveland and Capalaba Masterplans and the plans for the economic future of North Stradbroke and the Southern Bay Islands. This must be underpinned by the accessibility of research and direction for growth.

SOCIAL FABRIC – tourism can build community pride and sense of place if it is accessible to the visitors and their friends and relatives. This will be best achieved through growing local tourism events to become ‘hero’ events attracting more visitors.

Our Values

Tourism in the Redlands should capitalize on our proximity to a fast growing and new world city, Brisbane, while maintaining its own unique identity. The following values will guide the development and marketing of tourism in the Redlands over the next four years:

- ✓ Supporting a **vibrant community** and lifestyle
- ✓ Sustainable **growth in tourism**
- ✓ Creating **local jobs**
- ✓ Be recognised globally for the **balance of conservation, education, livability and tourism**
- ✓ **Working together** to achieve our goals
- ✓ **Leverage the Moreton Bay and Islands** brand with our own distinctive brand personality

‘Businesses will thrive and jobs will grow from opportunities generated by low impact industries, cultural and outdoor lifestyle activities, ecotourism and quality educational experiences.’

Redlands **2030** Community Plan

TOURISM IN THE REDLANDS

Visitation

In the year ended December 2009, The Redlands received a total of 159,250 domestic visitors and 6,951 international visitors, a total of 166,201 visitors². This equates to **3% of the 5 million visitors to Brisbane** in 2009. Annual visitation to the Redlands has declined since 2005 (down 1.7%) at a greater rate than Brisbane (0.3%) but not as much as the Sunshine Coast (3.7%). Since 2002 the region has experienced an average growth of 2.9% p.a which is on par with Brisbane and Queensland trends.

The **majority of visitors are from Queensland** (87%) with 61% from Brisbane. The visitors mostly stay at a rented house, apartment, flat or unit (31%) friends or relative's property (19%) or caravan or camping (18%). **Over 80% of visitors are holiday / leisure visitors**. In 2010, 13% of Sydney/Melbourne residents had visited Brisbane in the last 12 months however only 6% nominated Brisbane as their preferred holiday/short break destination. These figures highlight a lack of awareness in the interstate market of Brisbane and surrounds as a holiday destination and is an opportunity for the Redlands in future marketing campaigns.

The average length of stay for domestic visitors in the Redlands is **3.9 nights**. This is higher than the average length of stay for Brisbane (3.1 nights) but lower than other beach destinations including the Sunshine Coast (4.3 nights) and the Gold Coast (4.2 nights). The average spend per day is on par with other regions with Redlands receiving approximately \$76 per day, Caloundra \$70 and Maroochy \$99 from 2007 figures by Tourism Research Australia.

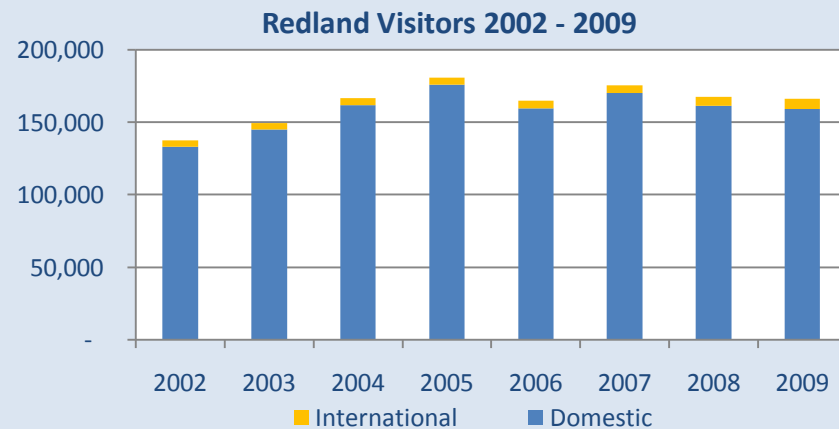
Redlands Visitor Profile

- Predominantly travel for leisure (81%)
- Mostly Brisbane residents (61%), couples and families
- Staying for 3.9 nights
- Spend approx \$109/night on a hotel
- Mostly short breaks (47%)

Based on 166,201 visitors staying 3.9 nights and spending an average of \$76 per day (domestic day trip average), tourism is worth \$50M in direct expenditure to the region. Based on the Tourism Satellite Accounts estimate this would support around 750 full-time equivalent jobs.

Compared with surrounding regions (in 2007), Redlands **average hotel takings** per room night occupied in a hotel with 5 or more rooms (\$109) **are below par** with Ipswich average takings at \$127, Caloundra \$117 and Brisbane \$120. Room occupancy is low with an annual average for 2008 at just 52%, this is below both the Brisbane (75%) and state averages (64%). This assessment does not however include accommodation with 5 or less rooms, which makes up an important part of the accommodation stock in the Redlands. Visitation to North Stradbroke Island is a mix between short break (1-3 nights) (47%), day trips (46%) and long breaks (4 nights or more) (28%). Visitation to the Southern Moreton Bay Islands is dominated by day trips (90%)³

Figure 2: Redlands Visitor Numbers 2002 - 2009



Source: Tourism Research Australia, 2010

² TRA (2009) NVS & IVS Data

³ TNS (2009) Moreton bay & Islands Awareness and Consideration Research

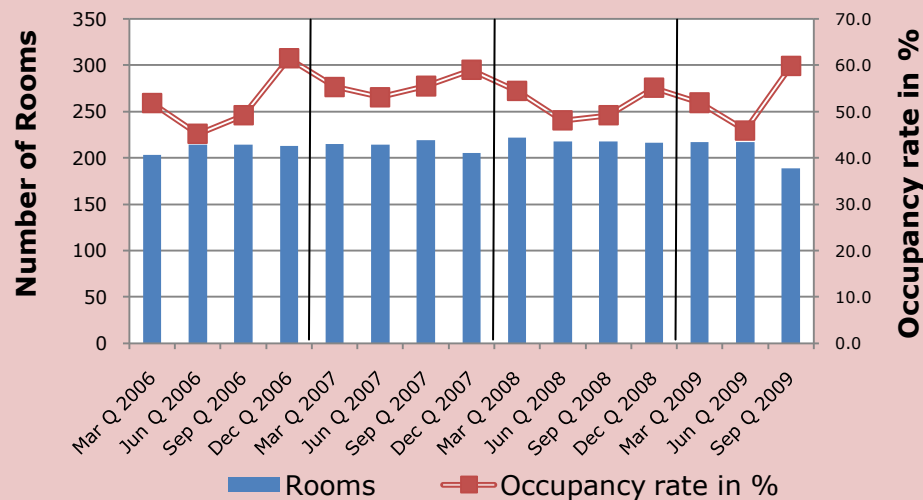
Product Investment and Growth

The Redlands is host to an array of tourism products and experiences; with North Stradbroke Island being a major drawcard for the region. The region is also home to a variety of tourism attractions that appeal to visitor markets including nature based attractions, recreational activities, cultural experiences and heritage products and places. One of the key potential areas for tourism product growth in the Redlands is in its natural environment, with outdoor recreation and local events.

The region currently has nine hotels (with 5 or more rooms) providing 189 rooms. There has been little investment in the last five years. While the room stock has declined over the last year, occupancy has been steady over the past three years, demonstrating that there is room for additional development. Without this development there is little room for tourism events to become a strength for the Redlands.

The region has had limited investment in new product since 2005, with some investment in B&B's and events in the rural hinterland and the majority of new product investment has been on North Stradbroke Island. Aside from the redevelopment of the Stradbroke Hotel, the majority of has been in 'holiday houses' which account for almost 30% of the accommodation used by visitors to the region⁴. The Brisbane RTIIP identified a number of product development opportunities, including resorts, tours and transport hubs (Toondah Harbour).

Figure 3: Redlands Rooms & Occupancy rate 2006- 2009 (Hotels > 5 rooms)



Local and Regional Trends

- Brisbane is **growing above the national average**, driven by 6% per annum growth in passengers through the airport
- The Brisbane region **bucked the national and state trend** showing growth in the year ended June 2009 and had strong growth over 5 years (Dec 2009 results showed a decline)
- Key segments showing growth were **business, education and backpackers** (3% per annum growth)
- Brisbane remains a key market, but has not grown at the same rate as intrastate visitors – Redlands is **losing share of Brisbane residents**
- Limited **investment in new products** (especially accommodation) with the one exception being holiday houses
- The Redlands has **grown international** markets
- The Redlands has a distinct late summer peak and winter low (see occupancy rate in Figure 3 left)

⁴ TRA (2009) NVS data

Infrastructure and Services

The provision of appropriate infrastructure and services is essential to support tourism growth and development as well as provide for the community's needs. One of the key strengths of Redlands is its location and proximity to Brisbane.

A key driver for success of the destination is its proximity to Brisbane and the affordability to access the islands. As the table below shows the Redlands is strong on value for money with regular barges and water taxis to the islands, which are a key part of the experience. There is satisfactory access to North Stradbroke Island and the Southern Moreton Bay Islands on the vehicular barges, and the regular water taxi services, however there is a lack of tourism readiness in the Region, particularly the Southern Bay Islands. In addition there is a bus service on North Stradbroke Island, however these services can be unreliable and expensive.

There is satisfactory destination access in terms of proximity to the capital city and the Domestic and International airports. However, there are a lack of amenities at ferry terminals and complicated public transport options linking islands within the bay. There are also inadequate disability and wheelchair access options.

Brisbane City to:	Drive Distance / Ferry Time	Return Price (4 pax with vehicle)
North Stradbroke Island	24km / 50mins	\$135
Moreton Island	25km / 75 mins	Peak: \$265 Off Peak: \$235
Fraser Island	270km / 50mins	\$150
Bribie Island	70km / 50mins	n/a
Coochiemudlo Island	40km / 7 mins	\$45
South Stradbroke Island (ex. Hope Island)	100km / 40mins	\$125
Southern Bay Islands	50km / 35mins	\$105

The phasing out of mining on North Stradbroke Island could result in a price increase for ferry access and less services. This has the potential to dramatically reduce visitation and the competitiveness of the destination.

Other key infrastructure constraints identified through this and previous studies include:

- A lack of accommodation both on the mainland and on the islands
- Lack of affordable accommodation to support hospitality staff on the islands
- Accessibility of the islands from the CBD
- Toondah Harbour
- Road infrastructure on North Stradbroke Island
- Limited tour operators in the region
- Air and boat access to North Stradbroke Island (including lack of marina)
- Launch facilities throughout the Redlands for activity based operations

A key area identified during the development of the Tourism Strategy is the need for waterfront precincts to create dining, accommodation and recreational experiences that are competitive with other destinations. The region is home to a number of significant educational institutions from senior colleges to the Moreton Bay Research Station (on North Stradbroke Island). Education represents a significant opportunity both in terms of tourism and broader economic growth.

“Education is a bigger draw card for visitors to Australia than Uluru, the Great Barrier Reef and all other tourist attractions put together.....nearly half a million people are living in Australia who would not be here if we stopped educating international students. The flow-on effect through the economy is enormous.”

IDP Education, CEO - Tony Pollock

The Redlands is located in the southern part of an emerging tourism region, Brisbane's 'Moreton Bay and Islands'. As a bay and island destination it is primarily targeting south-east Queensland short-breaks, therefore its brand positioning aims to differentiate it from other bay and island destinations such as the Gold Coast (South Stradbroke Island), Fraser Coast (including Fraser Island), the Whitsundays, and Townsville (Magnetic Island).

Current Awareness & Perceptions

Moreton Bay and Islands as a location, has relatively high awareness, positive perceptions and strong visitation (including repeat visitation) from the Brisbane market. Recent research shows that Moreton Bay and Islands is one of the 'top of mind destinations' for Brisbane residents, however there is limited awareness of the Southern Moreton Bay Islands.

Awareness of the 'Redlands' as a tourism brand is relatively low yet awareness of North Stradbroke Island is high for both Brisbane residents and non-residents. The opportunity exists to better leverage the Moreton Bay and Islands brand, without losing the unique selling points and brand awareness of North Stradbroke Island. The core attributes of the Moreton Bay and Islands Region are matched to Redlands core experiences below:

Moreton Bay & Islands Attributes	Redlands Experiences
Escape the daily grind	Camp and swim on an island
Have Fun	Attend a great local event
Recharge and Refresh	Visit a day spa or just sit on the beach
Discover new things	Spot whales from the beach
Enjoy Nature	See koalas and kangaroos in the wild
Have a Romantic Getaway	Stay in a uniquely designed holiday house
Adventure	4WD on the beach, dive, or learn to surf

Awareness and Perceptions of Moreton Bay and Islands - Survey Results 2009

- When prompted awareness of North Stradbroke Island is high for both Brisbane (95%) and non Brisbane residents (94%).
- While awareness of North Stradbroke Island is similar between Brisbane and other areas, visitation is much higher amongst Brisbane residents (52% vs. 35%).
- The opposite effect is true for the smaller islands where awareness is higher amongst Brisbane residents but visitation is equal across the market.
- **Moreton Bay & Islands is better known to Brisbane residents as a Queensland Holiday destination than the Great Barrier Reef.**
- Brisbane residents hold more positive perceptions of the region
- Accommodation expectations and preferences focus on standard hotels, caravan parks and rented houses
- The Top 10 activities that visitors like to participate in and associate with the MB&I region are: (however in some cases desired activities are not strongly associated with the region)
 - ✓ Relaxing
 - ✓ Dolphin feeding
 - ✓ Whale watching
 - ✓ Going to the beach
 - ✓ Swimming
 - ✓ Hiking / bushwalking
 - ✓ Picnicking
 - ✓ Wining and dining
 - ✓ Going to the markets and fishing

Key Messages

The Moreton Bay and Islands brand message is clear and awareness has grown. Moreton Bay is the only destination to offer a marine sanctuary and significant island experiences within close proximity to an urban centre. The Moreton Bay & Islands Positioning Statement is:

'Moreton Bay and Islands has a unique offering that leverages a marine sanctuary and island experiences within close proximity to a new world city and state capital.'

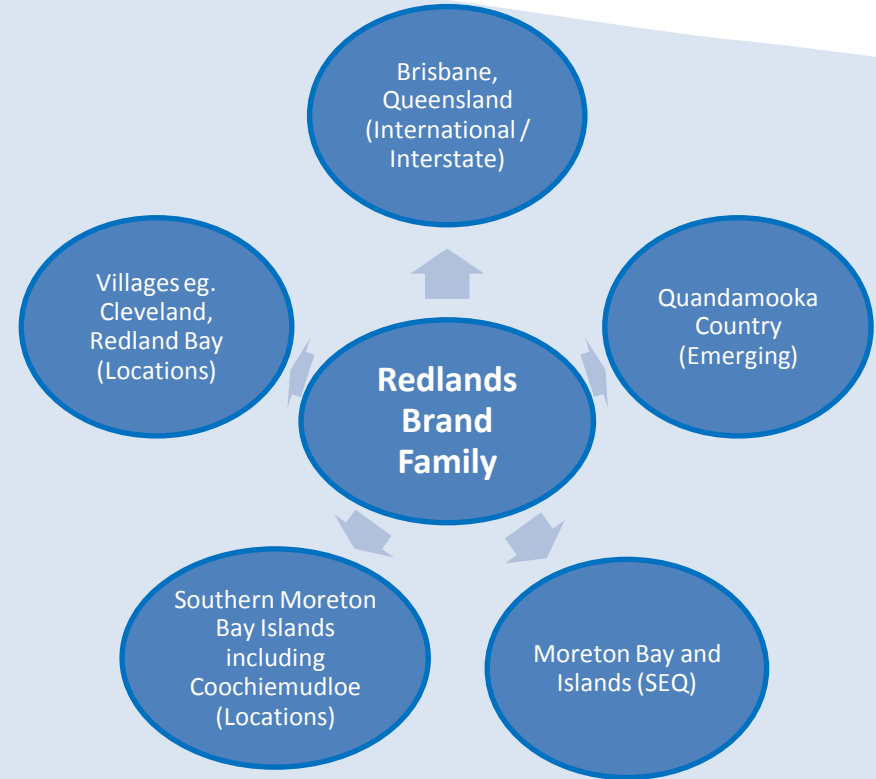
The Redlands can leverage off the Moreton Bay and Islands brand if it can clearly position itself within that brand as part of the Southern Bay and Islands (in partnership with Wynnum and Manly) The unique selling point for Redlands within the Moreton Bay and Islands Brand are the **accessible nature, culture and education experiences**.

Based on TQ's Market Segmentation, Moreton Bay & Islands is more appealing to the Connectors, with the primary target markets being Social Fun Seekers and Active Explorers, both of which were over represented in the most recent survey(TNS 2009), in comparison to the Queensland average (as shown in Figure 4 below).

Figure 4: Market Segmentation Queensland vs. Moreton Bay and Islands



Figure 5: Redlands Brand Elements



Unique Experiences in the Region

Accessible Island Communities	Education tourism
Koalas, Kangaroos, and marsupials	Whale watching from the beach
Dive with Manta Rays	Camping on the beach and on the Islands
Sailing the Bay and Islands (esp. Manly)	Indigenous cultural and heritage experiences
Reef Fishing, Snorkeling etc	Sea birds and marine life
Food and Wine - Sirromet	

UNIQUE SELLING POINTS

Redlands is located just 30kms east of the City of Brisbane making it the most accessible bay villages and islands for many Brisbane residents. The famous North Stradbroke Island and the cluster of Southern Moreton Bay Islands of which Russell, Macleay, Lamb and Karragarra Islands are the most populated along with the Moreton Bay Marine Park, Mt Cotton (Sirromet Winery) and Redland Bay are the region's most recognisable assets.

Largely focused on the natural environment, the regions unique selling points are:

- Spectacular choice of beaches on Stradbroke
- Affordability and accessibility
- Great climate
- The Island communities and mainland villages – welcoming people
- Wildlife – including Koalas, Kangaroos, turtles, whales, dolphins and dugongs
- Adventure – diving with Manta Rays, sand boarding, 4WDing, fishing, kayaking
- Sailing on the Bay and through the Islands
- Bushwalking including the islands
- Food and Wine – Sirromet
- Developing arts, Indigenous culture & heritage – Quandamooka Country

Stradbroke Island has the majority of day tours, diving, charter boat hire and tourism accommodation properties, and most activities available on the bay are affordable. On the mainland a number of new tours are emerging including tours based around food and wine (Sirromet Winery), history and outdoor pursuits. The Southern Bay Islands have a semi-rural lifestyle experience with village atmosphere and water based and outdoor recreation.

The region boasts beautiful beaches, aqua-blue waters, abundant marine life, Indigenous and early European heritage, a relaxed atmosphere and temperate climate. Emerging experiences for the region could include indigenous tourism, the waterfront and foreshore, tourism events, education tourism and adventure based activities.

From June to November each year, the majestic humpback whales pass through on their annual migration from Antarctica to their calving grounds near the Great Barrier Reef. North Stradbroke Island represents one of the best land-based vantage points on the east coast of Australia! Snorkelling, fishing and diving are popular pursuits with potential to grow with some spectacular marine mega fauna including turtles, dolphins,

eagle rays, barracudas, spanish mackerel and much more.

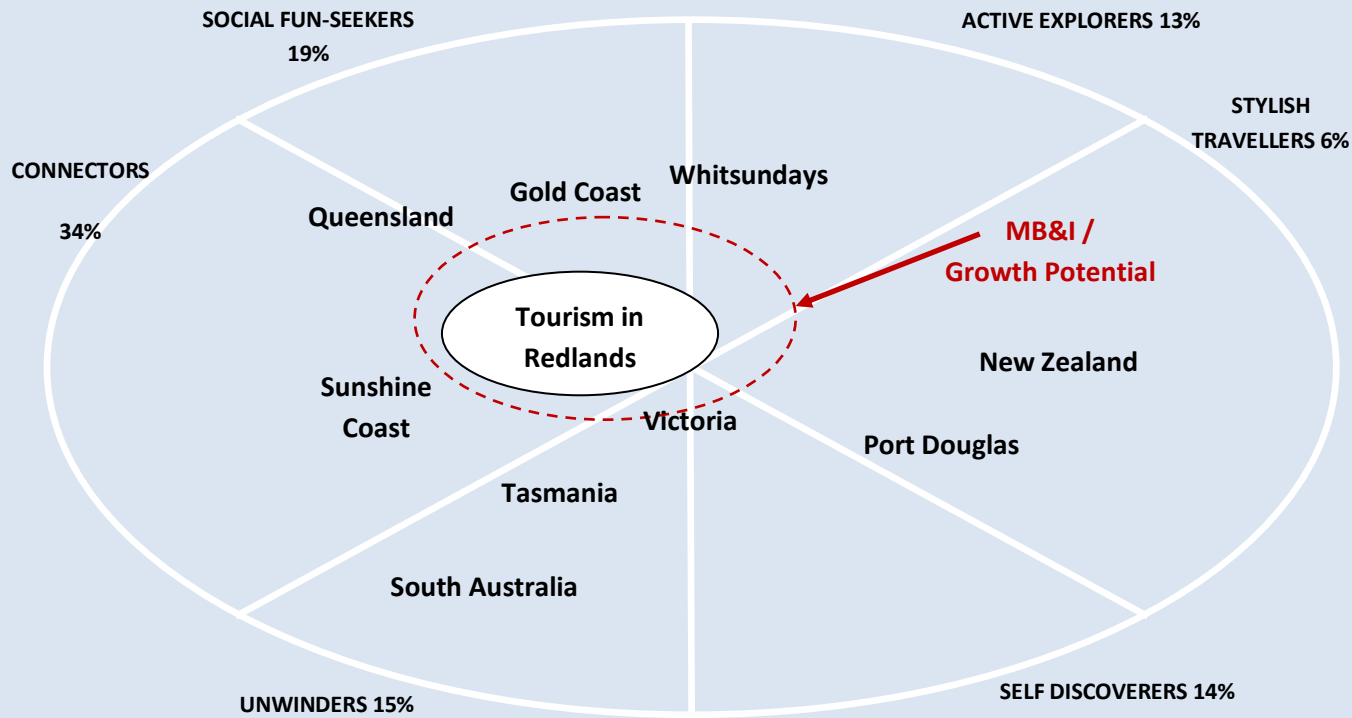
With a focus on product development of experiences, the potential key selling points for the Redlands within the Moreton Bay and Islands are:

Access to the Marine Park	Accessible Islands including NSI	Wildlife interaction	Spectacular Beaches
Food and Wine with water views		Diverse accommodation choices	Educational experiences including Indigenous



THE TARGET MARKETS

Needs based target market research conducted by Tourism Queensland identified six distinct consumer groups within the domestic holiday market based on an ideal holiday experience. The main target markets for Queensland are Social Fun Seekers and Connectors. This is the same for Brisbane, however for Moreton Bay & Islands, there is a stronger 'active explorers' segment than Brisbane, particularly for destinations such as North Stradbroke Island.



The Redlands has the potential to leverage the Moreton Bay and Islands brand to grow its market share in the following markets:

ESTABLISHED MARKETS (INTERSTATE)

- Connectors (Family Beach Holidays)
- Social Fun Seekers (Nature-based); and
- Active Explorers (Adventure)

The region also has the opportunity to grow a number of emerging market segments including:

EMERGING SEGMENTS

- Education Tourism – Schools and Universities (Domestic and International)
- Travel for a Purpose (Events); and
- International (including Backpackers)
- Environmental and cultural tourism



The Moreton Bay and Islands research identified the key barriers to visitation as cost and travel distance (for a day trip) and the top 4 desired activities as: relaxing 76%; whale watching 72%; swimming 70%, and snorkelling 65%.

Established Target Markets (Interstate)

Connectors (Beach Holiday)

Connectors, those looking for a traditional beach holiday, remain a primary target market for the Redlands. Connectors prefer to stay in a standard hotel room, self contained house, apartment or holiday unit. Ideally their accommodation offers cooking facilities and is child-friendly. While a commitment to environmental protection is valued by this segment their basic needs are for cleanliness and comfort. Connectors are the most likely to travel with their family, however, they will also travel just with their partner. They tend to build holidays around family and friends. Although they don't take many weekend breaks they generally go for a short break with their partner once a year.

The Connectors Segment is by far the largest segment for Queensland (32%) and Moreton Bay & Islands (34%). They enjoy going to the markets, hiking / bushwalking and dolphin feeding. This segment is predominantly attracted to the following Moreton Bay and Islands experiences: to have fun and to explore.



Social Fun Seekers (Nature Based)

Social Fun Seekers enjoy a lot of different activities, and sharing the experience with friends and other holidaymakers. This segment has a strong nature-based focus, and it is this part of the Social Fun Seekers market that best aligns with the Redlands tourism vision. The Social Fun Seekers Segment represents approximately 25% of all visitors to Queensland and 19% of visitors surveyed for Moreton Bay and Islands.

This segment may save on accommodation to have more money to spend on activities. They prefer casual dining and are more likely to travel with a group of friends or family. They like activities such as diving, snorkeling, sand boarding and 4wding.



Active Explorers (Adventure)

Active Explorers account for around 11% of Australian population and 13% of the Moreton Bay & Islands market. They want to be challenged by a holiday and love to explore and take part in adventure activities such as bushwalking, sailing, scuba diving, horse-riding and surfing. "Holidays are about pushing boundaries through challenging themselves via physical activity"

They are more open to staying in backpacker hostels, eco-lodge resorts or camping grounds than other segments. Of all the segments, they are most likely to visit multiple locations during their holiday. Active explorers go for weekend breaks when they can and often take the opportunity to build holidays around sporting or other events.

Active explorers are a growth market opportunity however the region lacks some of their core product needs including adventure tours.



Source: Tourism Queensland Market Segmentation Research

Emerging Segments

Education / Study Tourism / Voluntourism

International education visitors have been a major source of growth over the past 10 years. Worth \$4 billion to Australia in 2006, it is projected to have strong growth potential into the future⁵. This segment comprises of both formal and informal study.

Research by TRA in 2006 revealed that:

- ✓ Study tourists on average stayed much longer in Australia than the average international visitor (151 nights Vs 32 nights)
- ✓ On average they spend three times more in total and four times more in Australia than the average international visitor.
- ✓ The most common source markets were Japan and China, followed by Korea, New Zealand, Singapore and Malaysia.
- ✓ New South Wales (46%), Victoria (37%) and Queensland (31%) were the most visited States.

Brisbane Marketing is active in the market having established 'Study Brisbane' to drive growth in this market.

Interstate Market

The interstate market represents a growth opportunity for the Redlands. This can only be facilitated under the 'Moreton Bay and Islands' sub-brand of Brisbane, Queensland (Australia's New World City). In partnership with Tourism Queensland and Brisbane Marketing, the Redlands (as part of Moreton Bay and Islands) has the opportunity to increase awareness and conversion to bay and island holidays from key markets in Sydney and Melbourne on fly/drive and fly and flop holidays. To actively participate in interstate marketing more operators in the Redlands need to be 'domestic ready', that is ready to participate in trade promotions (paying commission). The key driver for growing the interstate market is therefore industry engagement and education, not simply marketing funds.

International (Experience Seekers)

Tourism Australia's target market, the "Experience Seeker" are experienced international travellers who see travel as an important part of their lifestyle. Known to be **knowledgeable consumers** they seek out and **enjoy authentic personal experiences** they can talk about, involve themselves in holiday activities, are sociable and enjoy **engaging with the locals, environment and culture** to come away having **learnt something**.

They are **somewhat adventurous** and enjoy a variety of experiences. They **do not enjoy being seen as tourists**. They typically:

- Spend more and come from households that have **higher than average household income**;
- Are **tertiary educated**, are open-minded and have an interest in world affairs;
- **Are not characterised by nationality**, preferred holiday style/mode or age;
- Are substantial consumers of non-traditional and mainstream media



⁵ TRA (2010) Study Tourism Report: Profile of International Visitors who studied in Australia.

OUR PRIORITIES

In understanding and responding to the market conditions and the needs of our community and our visitors, the Tourism Strategy for Redland City has five priorities in order to achieve the vision and aim to deliver sustainable tourism growth for the Redlands over the next four years:

Priority #1 – Partnerships and industry engagement and development

Priority #2 – A clear message and positioning

Priority #3 – Investing in economic growth through tourism

Priority #4 – A planned approach to growth and conservation

Priority #5 – Vibrant communities and tourism events

These priorities are supported by a number of priority projects to be implemented by a range of stakeholders (not only Council) to achieve our vision of an accessible and protected nature playground.



***‘Redlands is the most accessible,
protected nature playground
within Brisbane’s Moreton Bay &
Islands’***

Priority #1 – Partnerships and Industry Engagement

Objective: Maximise Industry Engagement and Participation by re-forming partnerships with the Local, Regional and State Tourism Organisations.

The Moreton Bay and Islands brand is established and desired by the industry. To grow the market share of the Redlands it is recommended that operators work under the Moreton Bay and Islands banner with access to a broad range of marketing opportunities which are planned and aligned to an annual program and calendar. Redlands City Council Tourism Unit needs to play a key role in bringing together the variety of marketing partners and agencies that offer support to Redlands businesses and create a single unified plan.

Operators in the region have a range of partners offering marketing opportunities from the Regional Tourism Organisation, the Local Tourism Organisation, to sub-regional groups (islands), Tourism Queensland, Queensland Outdoor Recreation Association and private companies offering advertising and representation. For most operators this is overwhelming.

The long-term goal would be to have an industry-led tourism alliance which encouraged regional cooperative marketing under the Moreton Bay and Islands banner. The aim would be to avoid the pitfalls of a membership based organisation by using a campaign or activities-based approach. This may take the form of a number of sub-regions (North Stradbroke, Southern Bay Islands, etc) having their own groups represented on a larger cooperative where contributions were not membership based but campaign or activities-based (e.g. Destination Gippsland).

In the short to medium-term the Tourism Unit within Redland City Council needs to focus on industry engagement, education and driving up the level of participation in cooperative campaigns through:

- More regular industry contact by Redlands Council staff with operators to encourage participation in cooperative activities;
- An annual industry forum (e.g. using the South East Queensland Country Conference model);
- Creating a single marketing prospectus for operators to review and buy in with State, Regional, Local and industry specific options identified;
- Establish an Economic Development and Tourism Board which is separate from but influences Council to lead the region and industry.
- Regular development workshops for operators on a variety of topics including market segmentation, online distribution, etc.; and
- Financial partnerships with Brisbane Marketing and co-operative marketing activities with Tourism Queensland.
- Partnerships with Universities and Tafe to provide training, development and student placement.



PRIORITY PROJECTS

ANNUAL MARKETING PROGRAM / PROSPECTUS

Redland City Council to work with each of the stakeholders offering cooperative marketing opportunities to local operators and create a single annual marketing program and plan that operators can review and buy-in to. This needs to be clearly explained in regular operator catch-ups.

TARGET 100

The target for 2015 is over 100 local operators actively participating in the tourism program through cooperative marketing, industry events, media and industry capacity building. In 2009 only 40-50 operators participated in coordinated activities. The development of an Annual Industry Forum is essential to encourage operator buy-in into the tourism program.

INDUSTRY-LED ECONOMIC DEVELOPMENT AND TOURISM BOARD

Adopting a non-membership marketing model, operators should be encouraged to work towards a common marketing plan under a newly formed Economic Development and Tourism Board leveraging state and regional marketing programs it should offer operators a range of cost effective campaign activities. Initially led by Redland Council the preferred model would be industry-led and should cover a larger geographic area (ie. from the Port of Brisbane to the Southern Moreton Bay and Islands). Smaller locally focussed groups may need to be established or refocused to build capacity prior to collaboration under one approach.

Priority #2 – A Clear Message and Positioning

Objective: Clearly define and position the Redlands within the Moreton Bay & Islands Brand

With limited awareness of the Redlands, and high awareness and preference for Moreton Bay and Islands within the Brisbane target markets, and potential in the Queensland and Interstate markets, it makes sense to work with the MB&I brand. North Stradbroke is a strong brand on its own, but should be used in conjunction with Moreton Bay and Islands to maximize the positive exposure.

The key aim for the next four years is to **clearly position the Redlands as the ‘gateway’ and active hub of the Moreton Bay and Islands brand**. The Redlands needs to take a clear position as the active, educational and wildlife interaction zone.

Key attributes of the Redlands are the islands, beaches, nature, wildlife and family. The education component will provide a vital point of difference in the intrastate and interstate markets.

Core attribute	Redlands	Gold Coast	Sunshine Coast	Fraser Coast	Townsville	Whitsundays
Islands	✓		✓	✓	✓	✓
Beaches	✓	✓	✓	✓	✓	✓
Nature	✓		✓	✓	✓	✓
Wildlife	✓			✓	✓	✓
Family	✓	✓	✓		✓	✓
Education	✓			✓		

While the natural assets of the region will support positive promotion, there is a need to develop new products and experiences that support its competitive advantage. These will be in both nature-based tourism and education. Examples of potentially differentiating products include:

- Unique accommodation (e.g. over water, treetops, etc)
- Wildlife tours (turtle spotting, koala tours, whale watching)
- Education tourism facilities (school camps, university research etc)
- Cultural tourism including Quandamooka indigenous culture and heritage experiences, through the development of the Minjerrabah Knowledge Centre

PRIORITY PROJECTS

LEVERAGE THE MORETON BAY AND ISLANDS BRAND

The Redlands region needs to further leverage the Moreton Bay and Islands and position itself within the existing MB&I brand, creating its own distinct sub-brand.



EMBRACE THE WATERFRONT

The Redlands as a region needs to re-embrace the waterfront allowing new tourism events spaces, recreational facilities and tourism development to occur along the coastline in ways that encourages both an appreciation and conservation of the natural environment.



OPERATOR TRAINING AND UP-SKILLING

Development of a partnership with the Chamber of Commerce to train and up-skill local tourism businesses. Operator education on marketing and brand positioning and distribution and packaging is required.

Priority #3 – Invest in Economic Growth through Tourism

Objective: Ensure the region’s economy grows through a diverse nature-based tourism industry.

The accessible islands and waterfront tourism villages are a key selling point for the destination. The economies of the islands rely heavily on the size of the population and the key economic drivers of mining, fishing and tourism. With the withdrawal of sand mining from North Stradbroke Island by 2027 and property values driving many long term locals to look elsewhere the island economies are increasingly under threat.

Nature-based and ecotourism could play a key role in the future of the region, with key segments of visitors growing above average being fishing, diving, education and outdoor activities (see Figure 5). This will rely on forward planning for future tourism infrastructure and investment and appropriate partner industries to support a diverse base. The following four precincts have been identified as key locations for future tourism growth:

- North Stradbroke Island (post-mining)
- Mt Cotton
- Cleveland Waterfront
- Southern Bay Islands

Key strategies to assist Redland City Council in meeting its objective to plan for the future growth and development of the islands include:

- Developing Master Plans for the identified tourism precincts to allow future growth; and
- Facilitating investment through appropriate planning and staffing within Council.

Figure 5: Emerging Market Trends in Brisbane

International Visitors	% of Total Visitor Nights	% Change in Visitor Nights
Fishing	12.64%	20.81%
Events	28.40%	21.41%
Scuba Diving	11.70%	24.47%
Short educational course	19.92%	16.96%
Surfing	14.59%	18.96%
Cycling	9.45%	8.98%
Total Visitors Nights	15.558M	11.27%

Domestic Visitors	% of Total Visitor Nights	% Change in Visitor Nights
Visit gardens	3.51%	-13.47%
Exercise	4.49%	32.63%
Events	4.31%	45.29%
Total Visitor Nights	13.136M	-6.78%

PRIORITY PROJECTS

ENCOURAGE NATURE-BASED INVESTMENT

Redland City Council to work with a number of local pilot projects in nature-based tourism to support and facilitate their development and ensure they adhere to the Council’s vision and planning policy. To support this initiative and ensure there is full community support for tourism development an environmental tourism code, such as the EarthCheck or Green Star Building Code should be adopted and developers should be encouraged to meet and exceed world’s best practice in sustainable design.



MASTER-PLANNING OF FUTURE PRECINCTS

Redland City Council to work with the State Government to develop Master-plans for the four precincts to allow them to sustainably grow and support local employment without compromising the values of the community or the need for conservation. This includes ensuring planning for the development of appropriate transport services and amenities and providing for the development of complementary tourism services e.g. dining

Priority #4 – A Planned Approach to Balance Growth and Conservation

Objective: Attract investment and increase the value of tourism through improving, not reducing, the environmental and cultural values of the region.

It is the region's natural and cultural assets that differentiate it from other regions. These need to be preserved to support a vibrant and sustainable future community and economy. Tourism, as an industry, is one of the best economic opportunities to both grow the value of the economy and conserve the regions natural and cultural assets. A focus on education and conservation will play a role in the region's future.

The Redlands has a range of products and experiences currently on offer, however there is a lack of value-added nature based tourism experiences to appeal to the identified target markets. Through a partnership between Council and the State Government a number of new businesses could be supported in a post-mining economic recovery program. Most tourism potential relates to waterfront land and water based recreation; which will require improved coordination between State Government, council and private providers to secure tourism investment potential.

The Redlands has limited information available for decision-making, tracking performance and encouraging investment. There is a need to create an annual research program in partnership with a University Tourism Program to track and monitor both the performance of marketing campaigns and the performance of the destination in terms of visitor numbers, expenditure, length of stay and satisfaction. A program such as the **Visitor Profile and Satisfaction Survey** of Tourism Australia would be ideally placed to fulfill this need.

Finally a land-bank needs to be established of suitable sites for nature-based tourism development that can be fast-tracked through the process as much of the consultation and preparatory work will have been completed.

PRIORITY PROJECTS

ANNUAL RESEARCH PROGRAM AND VISITOR PROFILE SURVEY

Work with local operators to collect and analyse existing performance data to better understand the success of marketing and develop an annual research program for data collection.

POST MINING NATURE-BASED TOURISM RECOVERY PROGRAM

The following list of projects has been identified as having potential for post-mining recovery. These opportunities can be developed along with other industries such as education, however the impact on the island communities and environment needs to be balanced. The key development themes are identified below with a full list of potential projects is included in Appendix 2:

- Accommodation
- Nature Based, Adventure and Cultural Tourism Experiences
- Education
- Events
- Transport Infrastructure

PROJECT FACILITATION

Through the Economic Development unit tourism projects should be facilitated through the development approvals process to attract investment in the region. A key enabler will be the establishment of a 'landbank' or identification of suitable land in appropriate precincts for tourism development (e.g. accommodation, attractions, etc).

The pilot project should be the Sirromet Winery in the Mt Cotton precinct and related key development opportunities in the wider Mt Cotton Region.



Priority #5 – Vibrant Communities and Tourism Events

Objective: For tourism to make a positive contribution to the vibrancy and viability of communities in the Redlands.

Tourism in the Redlands supports a range of vital community services and contributes an estimated \$50M into the regional economy and based on State estimates for job creation supports over 750 jobs⁶. In addition to the economic benefits tourism supports a wide range of community services from transport, to retail, dining and entertainment that might not otherwise be provided.

Events play a key role in building local pride, and the Redlands already has a number of successful tourism events such as the Straddie Salute, Island Vibes Festival, and the Straddie Assault. However, awareness of these events is low with the Moreton Bay & Islands Awareness and Consideration Research (2009) showing that 72% of respondents were unable to identify any events in the region.

The development of tourism events within the region can assist with creating a strong brand, encourage overnight stays / short-breaks, reduce seasonality, increase visitor spend and build local pride. The region needs a 'hero event' to gain awareness and raise the profile of the region. Given the awareness and amenities, North Stradbroke Island is best placed to hold such an event. Tourism events should be developed around the core brand pillars of the region including nature, education, wildlife appreciation, conservation, exploration. They should be focused on balancing high volume with minimal impact.

The Redlands community has a strong affinity with nature, and yet many of the public spaces, especially the waterfront do not provide opportunities to interact with and enjoy nature. Through the town and strategic plan, key pieces of waterfront land, including those near Toondah Harbour need to be developed to create vistas and vantage points to better appreciate the coastline and the islands. In addition to the waterfront, investment is needed in sports and recreational facilities and event locations to support the growth and position the region as a location for major outdoor events and festivals.

PRIORITY PROJECTS

BUILD LOCAL EVENTS – TOURISM EVENTS PROGRAM

Attract more Social Fun Seekers and Active Explorers with the expansion and support of key festivals and sporting events. The key strategy is to build on existing events through a dedicated tourism events program within Council to support and grow local events such as the *Straddie Salute* to become regionally significant. The events program should also play a role in attracting / developing new events for the region. Council support and funding for the development of new events in the initial growth phase is required.

Special events such as sporting events, cultural events and weddings are some of the most popular reasons to visit the Redlands. While the region is well placed with natural assets it lacks the accommodation and facilities to support major events. Key infrastructure needs include:

- Waterfront dining and recreation
- Event spaces and facilities
- Sports and recreational facilities
- Transport and access



TOURISM, RETAIL AND BUSINESS ACHIEVEMENT AWARDS

Encourage participation in the region-wide Tourism, Retail and Business Achievement Awards to encourage operator excellence and achievement.

COMMUNITY-LED TOURISM ROUND TABLE

Encourage community-led tourism projects and events including Indigenous tourism initiatives such as Minjerribah camping through a community round-table held biannually.

⁶ Source: EC3 Global based on NVs, IVS and Tourism Satellite Accounts (2009)

TWELVE PRIORITY PROJECTS

Based on the five priority areas for tourism in Redland City, there are twelve core priority projects for Redland City over the next four years in achieving tourism growth and economic development in the region and working towards the vision to become and be known as *'the most accessible, protected nature playground within Brisbane's Moreton Bay and Islands'*. The following section provides an Action Plan for the implementation of these twelve priority projects, along with the identification of strategy enablers and key performance indicators. It is recognised that this Plan will be an evolving strategic document that will be altered and amended as circumstances change.

1. **DEVELOP AN ANNUAL MARKETING PROGRAM / PROSPECTUS WITH OPERATOR BUY-IN**
2. **TARGET 100 – LOCAL OPERATOR PARTICIPATION IN TOURISM PROGRAM**
3. **BUILD SUPPORT FOR AN INDUSTRY-LED ECONOMIC DEVELOPMENT AND TOURISM BOARD**
4. **BUILD COMPETITIVE ADVANTAGE THROUGH EDUCATION**
5. **EMBRACE THE WATERFRONT FOR FUTURE TOURISM AND RECREATION SPACES**
6. **PARTNERING WITH THE CHAMBER OF COMMERCE TO TRAIN AND UP-SKILL OPERATORS**
7. **ENCOURAGE NATURE-BASED AND CULTURAL TOURISM PRODUCT INVESTMENT**
8. **MASTER PLANNING OF FUTURE TOURISM PRECINCTS FOR GROWTH**
9. **FUND AN ANNUAL RESEARCH PROGRAM AND VISITOR PROFILE SURVEY**
10. **LOBBY FOR A POST MINING NATURE-BASED TOURISM RECOVERY PROGRAM**
11. **BUILD AND ATTRACT LOCAL TOURISM EVENTS THROUGH A DEDICATED EVENTS PROGRAM AND INVESTMENT IN EVENT INFRASTRUCTURE**
12. **TOURISM, RETAIL AND BUSINESS ACHIEVEMENT AWARDS**



Implementing the Strategy

Measuring Our Success

Our mission: “through leadership and partnerships raise awareness and encourage investment in the range of accommodation, experiences and attractions.

We will know that we have achieved our mission if we:

- ✓ Engage the industry
- ✓ Build awareness and convert into holidays
- ✓ Create diversity and build local capacity
- ✓ Provide key infrastructure
- ✓ Build strong local community and operator support
- ✓ Grow our share of the Brisbane market
- ✓ Ensure the conservation of our natural and cultural assets

Strategy Enablers

1. Establish a single industry voice (without membership)
2. Partner with Brisbane Marketing and Tourism Queensland under the Moreton Bay and Islands brand with a distinct sub-brand
3. Adopt a project facilitation approach to support the NSI transition
4. Develop tourism events through a support program
5. Adopt a research, plan and lobby approach
6. Facilitate tourism investment through a Land Bank
7. Prepare a Long-Term Marketing Plan that is underpinned by Annual Marketing Plans
8. Establish an Education Partnership to underpin our Eco tourism vision



Redland City Council projects and marketing will be undertaken in accordance with the Local Government Act 2009, its corporate plans and in particular for this category, through a strategic contracting approach that is in adherence with Sections 169 & 179 of the Local Government (Finance, Plans and Reporting) Regulations 2010.

Action Plan

Priority #1 – Partnerships and Industry Engagement

Objective: Maximise Industry Engagement and Participation by re-forming partnerships with the Local, Regional and State Tourism Organisations.

Action	Priority	Lead Responsibility	Partnerships and Resources
Development of an annual marketing program / prospectus for the region. Operator consultation and review will be required to ensure buy-in and investment into the program.	High	Redland City Council / Brisbane Marketing	Local Organisations Local Operators
Development of an operator engagement process to encourage local operators to actively participate in the Council's tourism program. Initiatives could include education on the cooperative marketing opportunities, industry events, media and industry capacity building. These programs should align with the Operator Training program described under the Priority #2 Action Plan.	High	Redland City Council	Brisbane Marketing Local Organisations Local Operators <i>Funding required</i>
Encourage the establishment of an Economic Development and Tourism Board to provide leadership and build local capacity.	Medium	Redland City Council	Brisbane Marketing Local Organisations Local Operators Appropriate Govt. agencies <i>Funding required</i>
Development of a partnership between Redland City Council & local operators to develop an Annual Industry Forum . This industry forum could align with the Tourism and Retail Awards described under the Priority #5 Action Plan.	Medium	Redland City Council	Brisbane Marketing Local Organisations Local Operators Appropriate Govt. agencies <i>Funding required</i>
Development of a 'how to' guide for marketing targeted towards operators in the region. The focus should be on the fundamental principles of marketing and the variety of options and opportunities operators have	High	Redland City Council / Brisbane Marketing	Local Organisations Local Operators
Develop and implement a tourism training & development program for Redland City Councillors	High	Redland City Council	<i>Education Providers</i> <i>Funding required</i>

Priority #2 – A Clear Message and Positioning

Objective: Clearly define and position the Redlands within the Moreton Bay & Islands Brand

Action	Priority	Lead Responsibility	Partnerships and Resources
<p>Support for the development of new tourism product in the region that can build competitive advantage and differentiate the Redlands from its competitors. An Investment Prospectus should be developed for key tourism product development areas including:</p> <ul style="list-style-type: none"> ➤ Unique accommodation (e.g. over water, treetops, etc) ➤ Wildlife tours (turtle spotting, koala tours, whale watching) ➤ Education / voluntourism tourism facilities (school camps, university research etc) ➤ Cultural Tourism (Quandamooka Support) 	High	Redland City Council	Brisbane Marketing Investment Community Appropriate Govt. Agencies <i>Funding required</i>
<p>Support for new product development that embraces the waterfront of the Redlands. This includes new tourism events spaces, recreational facilities and tourism development occurring along the coastline in ways that encourages both an appreciation and conservation of the natural environment. These potential investment opportunities should be included in the Investment Prospectus.</p>	Medium	Redland City Council	Brisbane Marketing Investment Community <i>Funding required</i>
<p>Development of an Operator Training program in partnership with the Chamber of Commerce to train and up-skill local tourism businesses. Operator education on marketing and brand positioning and distribution and packaging is required.</p>	High	Redland City Council / Chamber of Commerce	Local / Regional Organisations Local Operators <i>Funding required</i>
<p>Prepare a Long-Term Marketing Plan that is underpinned by Annual Marketing Plans. The focus of this Marketing Plan should be to ensure that consistent brand positioning messages are promoted in all marketing campaigns and activities across the industry</p>	Medium	Redland City Council / Brisbane Marketing	Local Organisations Tourism Queensland
<p>Leverage the brands of the state and regional tourism bodies through membership of Brisbane Marketing</p>	Medium	Redland City Council / Brisbane Marketing	Local Organisations Tourism Queensland Local Operators

Priority #3 – Invest in Economic Growth through Tourism

Objective: Ensure the economies of the tourism precincts are diverse underpinned by a strong future for nature-based tourism industry

Action	Priority	Lead Responsibility	Partnerships and Resources
Work with a number of local pilot projects in nature-based tourism to support and facilitate their development and ensure they adhere to the Council's vision and planning policy.	High	Redland City Council	Local Operators Investment Community
Identify and implement an appropriate environmental tourism code for future tourism development, such as the EarthCheck or Green Star Building Code to encourage developers to meet and exceed world's best practice in sustainable design.	Medium	Redland City Council	Environmental Certification Organisations Local Operators Investment Community
Work with the State Government to develop Master-plans for the four tourism precincts - North Stradbroke Island (post-mining), Mt Cotton, Cleveland Waterfront and Southern Bay Islands. This includes ensuring planning for the development of appropriate transport services and amenities and providing for the development of complementary tourism services.	Medium	Redland City Council / State Government	Community and Government engagement <i>Funding required</i>

Priority #4 – A Planned Approach to Growth and Conservation

Objective: Attract investment and increase the value of tourism through improving, not reducing, the environmental and cultural values of the region

Action	Priority	Lead Responsibility	Partnerships and Resources
Work with local operators to develop an Annual Research Program and Visitor Profile Survey . This should include the collection and analysis of existing and new visitor statistics and marketing performance data.	High	Redlands Tourism / Redland City Council	Brisbane Marketing Tourism Queensland Local Operators <i>Funding required</i>

Action	Priority	Lead Responsibility	Partnerships and Resources
Development of a Post-Mining Nature Based Tourism Recovery Program for North Stradbroke Island. This includes identification of potential tourism development opportunities on the Island. A dedicated Investment Prospectus should be developed.	High	Redland City Council / State Government / Quandamooka Traditional Owners	Community and Government engagement <i>Funding required</i>
Development of a streamlined Development Approval process for suitable investment and development in the Redlands through creation of a Land Bank/Tourism Development Map	Medium	Redland City Council	Community and Investor engagement
Establishment of an Education Partnership to underpin the Redland City vision for eco and nature based tourism. Partnerships with schools, universities and research institutes should be investigated to further develop education tourism and voluntourism opportunities for the region.	Medium	Redland City Council	Education institutions Education Queensland

Priority #5 – Vibrant Communities and Tourism Events

Objective: For tourism to make a positive contribution to the vibrancy and viability of communities in the Redlands.

Action	Priority	Lead Responsibility	Partnerships and Resources
Develop a dedicated Tourism Events Program to support and grow local events. This program should also play a role in attracting / developing new events for the region. Council to review its recent Events Strategy and reconsider the funding and resourcing of events staff in Council based on a sound economic assessment (including tourism).	High	Redland City Council	<i>Funding required</i>
Investment in key infrastructure required to support the community and event development in the region including: <ul style="list-style-type: none"> ➤ Waterfront dining and recreation ➤ Event spaces and cultural facilities ➤ Sports and recreational facilities ➤ Transport and access 	Medium	Redland City Council / State Government	Investment Community <i>Funding required</i>
Encourage participation in the region-wide Tourism, Retail and Business Achievement Awards . These Awards may be linked to the development of the Annual Industry Forum described in the Priority #1 Action Plan and the Moreton Bay and Islands Tourism Awards.	Medium	Redland City Council	Local Operators Chamber of Commerce Moreton Bay Task Force <i>Funding required</i>

Appendix 1: SWOT Analysis

Strengths

- Large number of repeat summer holiday family holiday and VFR tourists with high satisfaction
- Day visit market
- Unspoiled and uncrowded
- Close proximity to major capital city
- Peaceful and tranquil
- Environment for connecting with families/partners
- Year round holiday destination
- Excellent opportunities for viewing wildlife (including marine mammals, fish & turtles, birdlife and koalas)
- Beaches (islands)
- Renowned fresh seafood product
- Number of island destinations
- 2WD accessible /
- 4WD on beach
- Relaxed and unpretentious
- Brisbane & SE QLD family holiday & short break holiday destination
- Safe and friendly family environment
- Temperate climate
- Diverse range of reasonably priced and well located accommodation options, including beach camping
- Established scenic tour routes
- Well researched and documented heritage product
- Strong liaison between tourism & economic development
- Effective strategic alliances and networks at local, regional and state level

Weaknesses

- Access – connectivity
- Toondah Harbour environs
- Cost to access islands
- Absence of 4½ - 5 star standard of accommodation to complement other product
- Lack of public boat moorings/ berthing opportunities
- Limited bay access (public ramps and jetties)
- Uptake of destination branding by local businesses and operators has been low
- Lack of operator uptake in ATDW
- Limited awareness in wider market
- Varying motivation of operators
- Varying business knowledge and skill sets of operators
- Lack of commissionable product
- Poor industry cohesion
- Limited funds for cooperative marketing
- Fragmentation and limited industry support
- Lack of international ready product
- Limitations in Aboriginal cultural product
- Limited quality dining (especially Southern Moreton Bay Islands)
- Lack of rich imagery
- Variable service quality
- Poor communications infrastructure in many parts (especially the bay islands)
- Lack of understanding of how environmental sustainability can be achieved

Opportunities

- Growing population in SE Qld
- Redlands on Moreton Bay branding awareness
- Brisbane's Moreton Bay & Islands cluster campaign
- Local market looking for new/closer experiences (fuel costs & economic climate)
- Nurture authentic Indigenous experiences
- Cultural tourism clusters (i.e. arts communities on bay islands)
- Rural tourism and horticulture lifestyle precinct model at Mt Cotton
- Engagement with National Parks & other government agencies
- Visitor service quality improvement through AussieHost program
- Increased cooperative marketing partnerships with industry clusters
- Brokerage of cohesive approach
- Increase level of packaged "commissionable" and international ready product
- Add value to nature based activities (i.e. whale watching currently land based activity)
- Environmental protection – ecotourism accredited operators
- Increasing job prospects (approx 600 bay jobs are tourism related)
- High repeat visitation
- High yield short break market
- Target appropriate segments of the growing backpacker market
- Conversion of day visits
- Leverage Moreton Bay Investment and Infrastructure Plan
- Emerging events capitalising on food & wine product
- Niche market opportunities (i.e. spa & wellness, nature based tourism)
- Increase community engagement
- Links with adjacent areas for marketing, product development & training etc

Source: Redlands on Moreton Bay Communications Strategy

Threats

- Government Agency restrictions (National Parks, Environment Protection Agency; Maritime Dept; Local & State Government regulations)
- Changes in management may exclude some activities and impact on viability of commercial operators
- Increasing fuel costs for barge/ferry companies servicing the islands passed on to consumer
- Local residents' attitude to tourism, especially on islands
- September 'schoolies' week
- Native Title claims
- Complacency within tourism industry
- Competition from other destinations
- Competing interests for discretionary spend
- Visitors loving the destination to death and destroying the very fragile ecosystems that make the destination initially attractive
- Moreton Bay Marine Park Rezoning Plan (2008)
- Low yield family holiday market
- Confusion of roles and responsibilities of tourism facilitators (local government & private organisation)
- Nearby mature and rejuvenated destinations with greater marketing budgets
- Major environmental crisis or catastrophic event could change the perception of the area as a safe and unspoilt destination
- Adverse changes in economic conditions
- Urban and industrial encroachment on rural/coastal landscapes and natural areas

Appendix 2: New Product Opportunities

Key Product Development Opportunities

Accommodation	<ul style="list-style-type: none"> ▪ Unique and world class accommodation ▪ Beachfront / waterfront accommodation ▪ Luxury safari camp / tents linked by a Great Walk on NSI
Nature Based and Adventure Experiences	<ul style="list-style-type: none"> ▪ Rangers station offering Junior Rangers Program ▪ Hangliding / paragliding platform ▪ Whale watching including Interpretive signage and permits to allow whale watching from boats ▪ Wildlife interaction and education (koalas, turtles, whales) ▪ Quandamooka Indigenous Cultural and Heritage Experiences ▪ Water based access site development (eg. Carry in kayak and canoe launch sites)
Education	<ul style="list-style-type: none"> ▪ Sand mining interpretation and education facility ▪ School camp / education facility supporting voluntourism –counting / spotting koalas, turtles, manta rays, whales
Events	<ul style="list-style-type: none"> ▪ Supporting infrastructure for a major tourism events ▪ Tourism events space in the current mining leases on NSI with shuttles
Transport Infrastructure	<ul style="list-style-type: none"> ▪ Development of ring road linking Point Lookout with East / West Road ▪ Expanded airfield facilities ▪ Bike path linking the three villages ▪ Development of Toondah and Dunwich Harbours ▪ Ferry subsidy to remain price competitive ▪ Creation of small scale interactive entertainment and sporting facilities on NSI (particularly for under 18s) ▪ Improved transport to Southern Moreton Bay Islands

Additional Product Development Opportunities by Area

POST MINING NATURE-BASED TOURISM RECOVERY PROJECTS		
Region Wide	Mainland	NSI & Bay Islands
<ul style="list-style-type: none"> • Access through a marine gateway (Toondah Harbour or Brisbane River) • Integrated Moreton Bay terminal on Brisbane River • Secure skilled and semi-skilled staff • Develop new attractions and activities to generate longer lengths of stay • Expand the number of and upgrade the accommodation facilities catering to leisure and business visitor markets • Developing a series of high quality walkways – accessible by foot and bicycle only • Supporting infrastructure for major events • A university campus • Koala / kangaroo spotting tours (night and day) • TAFE courses at the high school campus • International standard tour operators • Paragliding platform • Unique and world class accommodation e.g. on water accommodation • Accommodation on the beach • Diving pontoons and facilities (including promotion of manta rays and a potential dive wreck) 	<ul style="list-style-type: none"> • Mainland 50+ room accommodation and meeting facilities (accommodation for conventions) • Four star hotels, low-rise with designs sympathetic to local environs • Redevelop Toondah Harbour • Build four new caravan and camping parks on or near the coast • New caravan park in Mt Cotton • Whale Watching tours • Cleveland Centre Master Plan (incorporating Black Swamp Wetlands and Showground) • Flower industry opportunity for visitor tours • Introducing a community awareness program • Development of design guides for the island villages • An Up-Skilling program & employment and skills audit • Introducing affordable housing for workers • More permits to allow whale watching from boats (including North Stradbroke Island) • Creation of new cafes and restaurants on the waterfront • More accommodation in the Redlands to support day trips • Development of a rural tourism precinct in the Mt Cotton hinterland (as proposed by DIP in SEQ Plan) including product development such as spa and wellness, accommodation to support major functions at Sirromet and transport options 	<ul style="list-style-type: none"> • Creation of boutique eco-lodge at either Point Lookout or Amity Point • Expanded airfield facilities on NSI • Creation of a permanent camp site on NSI • Creation of small scale interactive entertainment and sporting facilities on NSI (particularly for under 18s) • Master Plan for the villages on NSI • Development of the jetty, unmanned Visitor Centre and interpretation facilities on Peel Island • Activities and interpretive information based around the world's largest aquifers on NSI • Re-introduce a major fishing festival to the islands and bay • Bike path linking the three villages • Re-opening of some of the 4WD tracks • Marina – Amity Point or near the Little Ships Club (Dunwich) • Great Walk – cultural guided experiences • Luxury safari camp / tents • Timber boat yard making 'island timber' boats • Land releases around the villages supported by Master Plans • Loop Road linking East-West Road with Point Lookout • Developing a ferry service from Brisbane direct into the Bay and islands • Minjerribah Knowledge Centre-North Stradbroke