



EARTHCHECK



Fraser Coast Destination Management Plan

2023 – 2028

July 2023

Version – 2.0

Date – 2/04/2024

Prepared by – Stewart Moore

Verified by – Nigel Russell

Project prepared for

CORPORATE BRAND

Fraser Coast
Tourism & Events Ltd

DESTINATION BRAND

QUEENSLAND'S
Fraser Coast
NATURE • HERITAGE • REEF
visitfrasercoast.com

Delivered by



EARTHCHECK

Acknowledgement of Country

Fraser Coast Tourism & Events acknowledges the Butchulla people, their connection to country (land, sea and sky) and recognises the many places of cultural, spiritual, social and economic significance in the community. We pay respects to the Elders, past, present and emerging. The Fraser Coast Regional Council also acknowledges all Aboriginal and Torres Strait Islander people who reside in the Fraser Coast region.

Disclaimer

The information and recommendations provided in this document are made on the basis of information available at the time of preparation and the assumptions outlined throughout the document. While all care has been taken to check and validate material presented in this report, independent research should be undertaken before any action or decision is taken on the basis of material contained. This report does not seek to provide any assurance of project viability and EarthCheck accepts no liability for decisions made or the information provided in this report.

Cover Page Image Sourced from Tourism and Events Queensland 2022

Icons used in document sourced from Flaticon <https://www.flaticon.com/>

Foreword

Message from Fraser Coast Mayor, George Seymour

It gives me great pleasure to announce the release of the Fraser Coast Destination Management Plan, which sets out our united vision for the region's tourism industry over the next five years.

The plan has been developed through extensive consultation with stakeholders and the community, providing a comprehensive framework for the sustainable growth of our region's tourism industry. It is based on the principles of economic, environmental, and social sustainability, and recognises the importance of working collaboratively to achieve our shared goals.

The Fraser Coast is blessed with an abundance of natural beauty and unique heritage and marine attractions, and we are committed to ensuring that the benefits of tourism are maximised while minimising any negative impacts on people and planet.

I encourage everyone to read the plan and to work together to make the Fraser Coast an even more attractive and vibrant destination for global visitors.

Thank you to everyone who contributed to the development of the plan, and I look forward to working with you all to bring it to life.

Message from Fraser Coast Tourism and Events CEO

This new Fraser Coast Destination Management Plan sets our ambition and focus for the next five years. As we work towards Queensland's goal of \$44 billion in overnight visitor expenditure by 2032, Fraser Coast is keen to play an important role in driving for growth. To reach this outcome, as an industry we need to work collectively to meet the needs of our markets, to build and develop new experiences that drive demand and continue to deliver exceptional experiences that transform and inspire.

The tourism industry also plays an important role as a steward of our natural environment. In this next phase of our destination management journey, we look to enhance this role, identifying ways to enhance tourism's positive impacts whilst reducing negative impact.

I look forward to working with you all in the coming years to deliver exceptional outcomes for the sustainable future of the Fraser Coast region.

Executive Overview

The Destination Management Plan (DMP) provides strategic guidance on what actions are required to deliver a strong and resilient visitor economy for the Fraser Coast region that can meet the needs of the local community, business operators and the expectations of visitor markets. The planning process has been underpinned by extensive market research together with planning workshops and meetings with key stakeholders over an eight-month period. The plan establishes a three-year time horizon for actions and includes a vision and positioning statement, the identification of catalysts and drivers of growth together with three core strategy pillars.

The Fraser Coast region has experienced growth in the past 18 months following COVID-19 and is well placed to build on the products and experiences already in place to service traditional domestic markets together with the return of international visitors. In addition, now is the time to position the region to meet the needs of new travel markets and the opportunities which will start to open with the planning for and delivery of the Brisbane 2032 Olympic and Paralympic Games.

One of the clear recommendations from regional meetings was the recognition that co-ordinated leadership from a wide variety of key stakeholders (government, business, and community) will be required for the DMP to be successfully implemented. This includes a greater understanding of the economic significance played by the visitor economy and the important role played by the local community in servicing and welcoming visitors to the region.

The vision for the Fraser Coast is centred on being globally recognised in target markets for World Heritage Listed K'gari (Fraser Island) together with the delivery of world class natural encounters centred around whale watching, adventure-based activities and marine tourism. The Fraser Coast has a significant story to deliver on Indigenous and European history, but more work is required to package and present these opportunities to visitor markets.

From a marketing perspective the focus will continue on priority domestic drive markets from South-East Queensland including younger and older families and empty nesters, together with the opportunity to increase the spend and yield from older Single Income No Kid (SINKs) and Dual Income No Kid (DINKs) visitors, who have the time and resources for short breaks and extended holidays. International adventure and backpackers are expected to grow in the lead up to the Olympic and Paralympic Games. The Fraser Coast region will need to work closely with Bundaberg, Noosa and the Sunshine Coast to ensure that it maintains its place in international travel packages.

With the support of Tourism & Events Queensland, the Australia's Nature Coast partnership provides an opportunity to bring collaborative marketing funds to the table and to build on the three biospheres that have now been established in the wider region.

A marketing transition strategy is important to help manage the transition of the strong equity in the Fraser Island brand to the reinstated name of K'gari. This needs to be a long- term plan leading

up to the Olympic and Paralympic Games in 2032. The need for a dedicated management and Tourism Strategy for K'gari is also now critical to the region's future growth, particularly the development of new marine products and services.

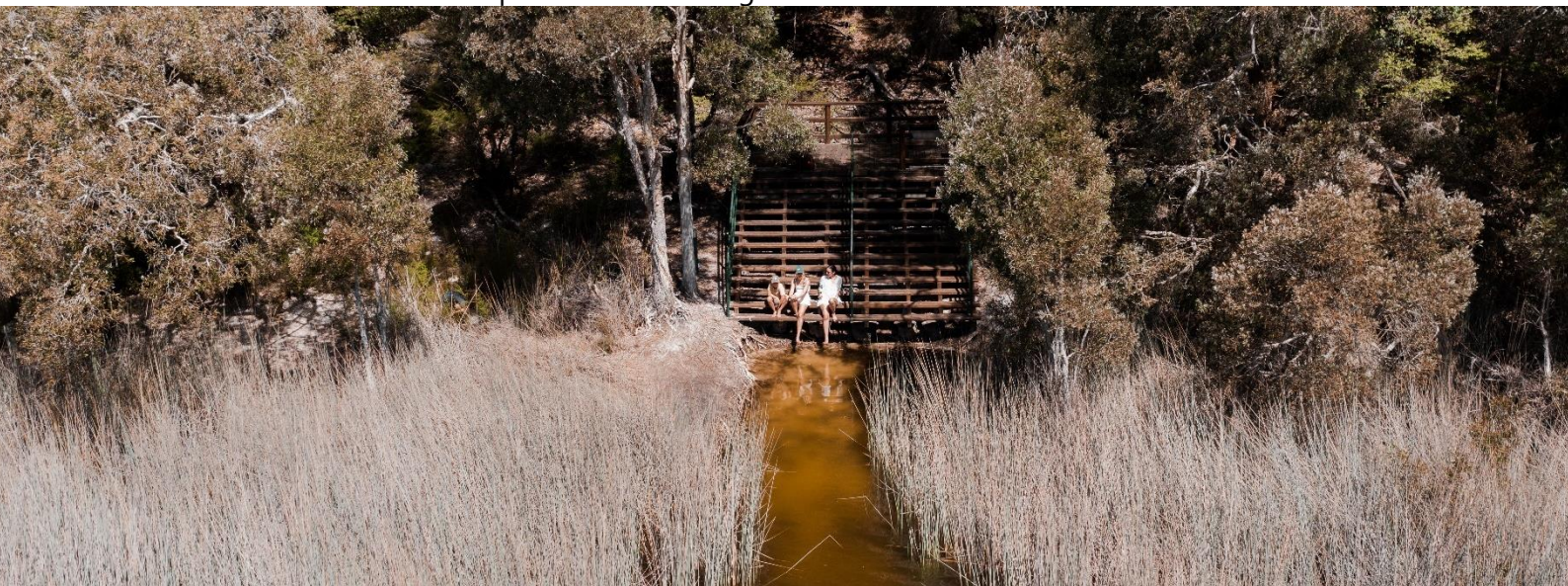
The plan recognises the need to support visitor dispersal across the region by promoting regional events, themed drive itineraries and initiatives such as the Mary2Bay Rail Trail which is currently partly complete with work continuing on more sections. In addition to refreshing and upgrading existing products and services the report recommends the need to work with the Fraser Coast Regional Council to prepare an investment prospectus to identify new accommodation and product options. A dedicated four-star hotel together with services to meet the needs of younger and older families should form part of this work.

The timing is right to develop a united vision and support for tourism across the region with key partnerships in place to deliver economic growth and quality of life for the local community.

What does success look like?

The following aspirational aims were put forward through stakeholder workshops.

- National and global recognition for delivering *the best nature and marine-based adventure experiences that Australia has to offer*.
- A united vision and support for tourism across the region with key partnerships in place to deliver economic growth and quality of life for the local community.
- A game-changing portfolio of products, experiences and events which bring the region's rich natural and cultural assets to life. (e.g. Whale Interpretation Centre).
- A leader in accessible, Indigenous and sustainable tourism.
- A balanced portfolio of year-round tours and attractions delivering high-yield financial return and visitor dispersal.
- The Fraser Coast and Fraser Island retain their market awareness in the transition to K'gari.
- Fraser Coast becomes the go-to destination for South-East Queensland markets (including Olympic Games visitors) seeking marine, nature and heritage-based experiences in a safe and accessible environment.
- The investment prospectus delivers new dedicated accommodation infrastructure, improved marine access and new products for the region.



VISION

Globally recognised for World Heritage Listed K'gari (Fraser Island), world-class personal natural encounters, rich Indigenous and European heritage and delivering Australia's No 1 whale watching experience.

CORPORATE VISION

Australia's leading nature, adventure and heritage tourism destination.

Organisation Purpose

A strong and resilient visitor economy supported by the community and delivering sustainable economic returns for local businesses.

DESTINATION POSITIONING

Delivering the best year-round nature and marine based adventure experiences that Australia has to offer.

World Heritage listed K'gari (Fraser Island) with its strong Indigenous history, its pristine beaches, majestic rainforests and unique flora and fauna in untouched wilderness.

Close access to the Southern Great Barrier Reef with spectacular wreck and reef diving and sailing.

The world's first Whale Heritage Site with Australia's best whale watching.

A safe, clean and accessible destination surrounded by the sheltered waters of the Great Sandy Marine Park and bordered by a rural hinterland.

A rich military, industrial, Indigenous and agricultural history which comes to life through events, attractions, story-telling and festivals.

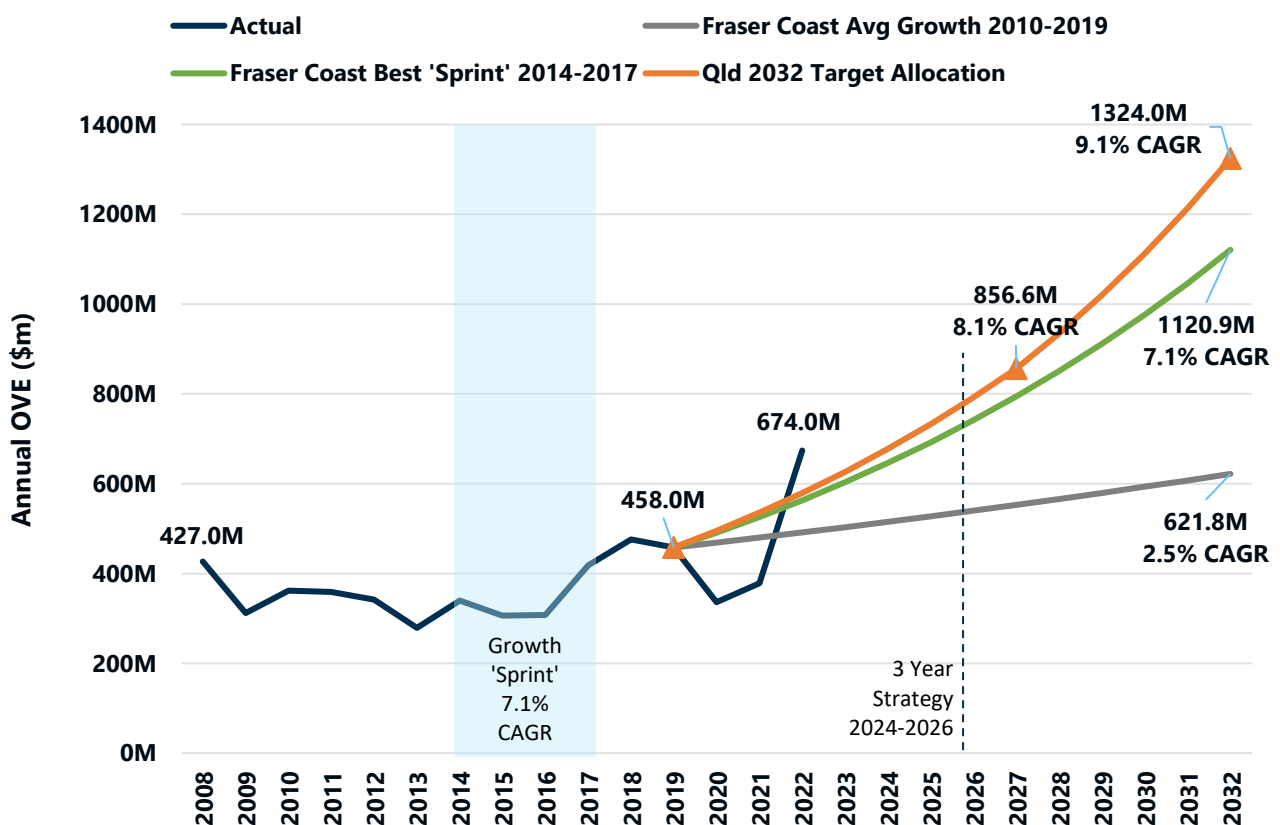
STRATEGY AREAS

Destination Marketing | Destination Stewardship | Experience Delivery

Fraser Coast Aspirational 2032 Target

Through this DMP Fraser Coast will play an active role in its support of the actions and targets outlined in the State plan – *Towards 2032: Reshaping Queensland's visitor economy to welcome the world*. However, Fraser Coast's contribution is dependent on several variables:

- Destination visitation figures continue their strong growth track exceeding 2019 figures in the year to December 2022;
- The substantial increase in Queensland intrastate travel during the pandemic will remain;
- The Fraser Coast retains access to its current level of annual State and Local Government funding (\$2.3m);
- The region builds back to its pre-2019 share of pre-pandemic visitation from Europe, the United Kingdom and North America;
- The Fraser Coast is successful in developing a new market from New Zealand, leveraging the Sunshine Coast International Airport;
- All growth factors will be even across the State.



Source: TEQ 2032 Target; NVS/IVS, TRA 2023

- **Orange – State aspirational target – 2019 start**
 - 2019 Actual – 2027 milestone: 8.1% CAGR
 - 2027 Milestone – 2032 Target: 9.1% CAGR
- **Grey – Average growth 2019-2032 based on FC actual 2010-2019 Compounding average growth: 2.5% CAGR.**
- **Green – Average growth 2019-2032 based on FC actual 'growth sprint' 2014-2017: 7.1% Compounding average growth.**

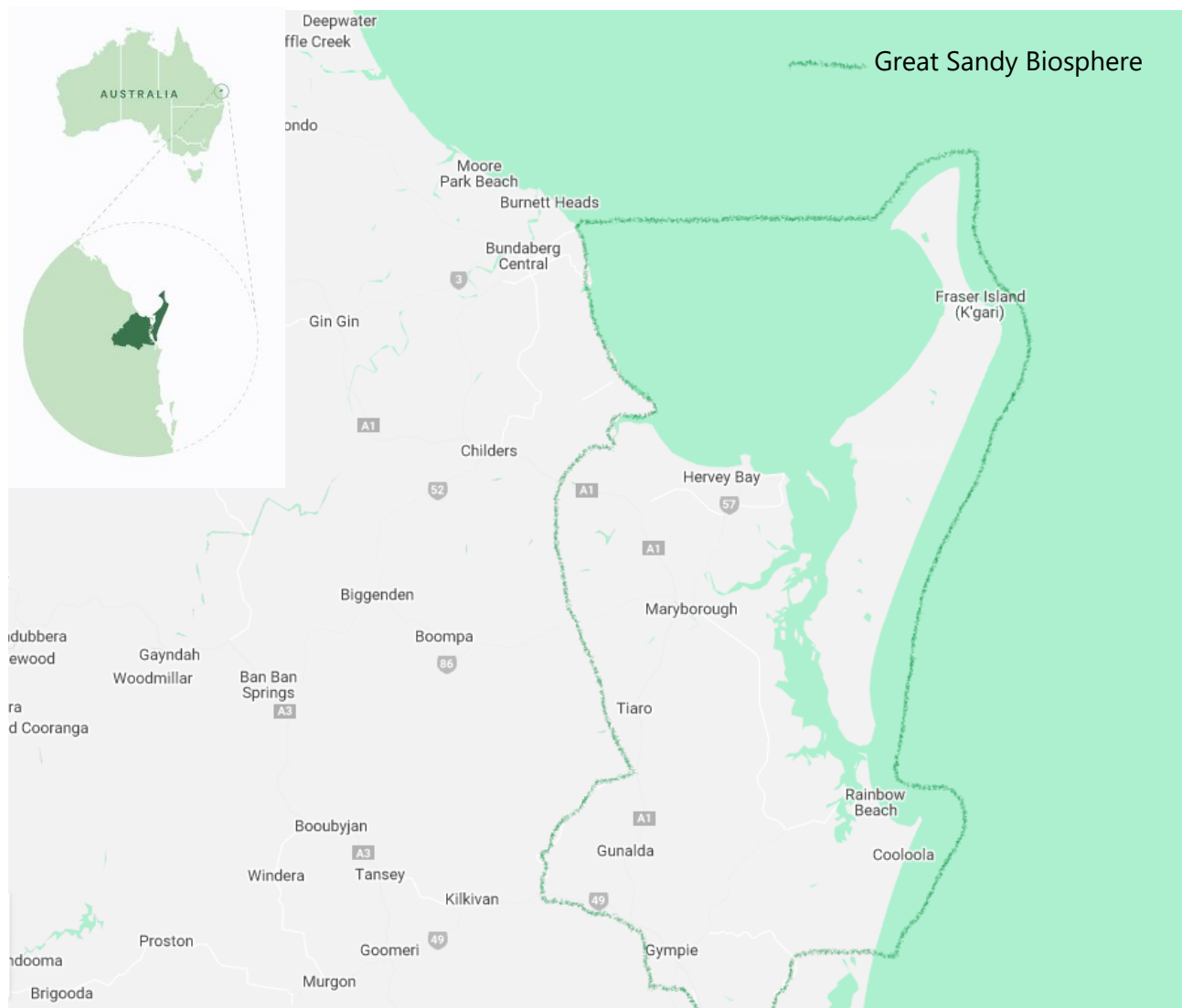
Contents

Executive Overview	4
01 – Introduction	9
02 – Setting the Scene	10
Alignment to Local, Queensland & Federal Strategy and Plans	10
Overnight Visitor Targets	11
Economic Value	12
Trends Impacting the Visitor Economy	14
Fraser Coast's Visitor Profile	16
Fraser Coast Aspirational 2032 Target	20
03 – Tourism Opportunity	21
04 – Situational Analysis	23
Enablers & Catalysts	27
05 – Risk and Crisis Management	28
Planning for the Carbon Economy	29
06 – The Strategy	31
Priorities for Success	32
Key Strategy Pillars	33
07 – Action Plan	34
Destination Marketing	34
Destination Stewardship	35
Experience Delivery	36
08 – Targets & Performance	37
09 – Roles & Responsibilities	38
10 – Appendices	39
Appendix 1 Key Strategic Plans	39
Appendix 2 Data Behind the Recommended Targets	43

01 – Introduction

The Fraser Coast region is located approximately 260km north of Brisbane. The region is home to the World Heritage listed K’gari (Fraser Island), a rich Indigenous culture, unique diving experiences, safe and secluded beaches, is the number one place to watch humpback whales’ play and has close access to the Southern Great Barrier Reef. The region has a significant European industrial heritage (ship building/rail/sugar milling equipment) and an extensive military history.

The Fraser Coast is rich in natural and heritage attractions, centrally located within the Great Sandy Strait biosphere, with K’gari, the rich coral cay of Lady Elliot Island, Lady Musgrave Island and the military and industrial past of Maryborough stand-out attractions.



This Destination Management Plan (DMP) sets the goals and ambitious targets for the sustainable management of the Fraser Coast Region from 2023-2038.

02 – Setting the Scene

The development of this DMP was a collaborative process with input received from Fraser Coast Regional Council, visitor economy businesses and Traditional Owners during late 2022 and early 2023. The priorities and action items reflect the needs and expectations of key stakeholders and are aligned to the following strategies:

Alignment to Local, Queensland & Federal Strategy and Plans

The Fraser Coast DMP aligns to and supports a broader policy framework, including the current tourism policy at a federal and state level.

Federal	Thrive 2030 – Austrade The federal framework for tourism development focuses on recovery, capacity building and resilience of the visitor economy. Across three core themes of collaborate, modernise and diversify, the strategy aims to grow high quality visitor experiences, industry connectivity, collaboration and workforce development.
State	• Towards Tourism 2032: Transforming Queensland's visitor economy to welcome the world – a collective framework to set the direction of tourism in Queensland for the next 10 years. The strategy offers three pillars of development – demand, supply and connectivity; catalysts for change; and enablers of change. The actions are designed to reach a \$34 billion aspirational spend target by 2027 and \$44 billion by 2032. • Next Generation Tourism Planning Guide – This guide to planning provides a foundation for the promotion and development of the visitor economy. Encouraging innovation, the guide outlines how appropriate tourism development can be realised. • TEQ Nature-based Tourism Strategy 2021-2025 – The strategy aims to support the revitalisation of the Queensland nature-based tourism offering to capitalise on growing demand more effectively for natural and cultural experiences. • Good People, Good Jobs: Queensland Workforce Strategy 2022-2032 – New challenges across all sectors of the economy mean that new approaches are required to build a strong and diverse workforce ready for today and adaptive for the future. The strategy is underpinned by five focus areas including workforce participation, school to work transitions, local solutions, attraction and retention and skilling Queenslanders now and into the future. • Inclusive Tourism: Making your business more accessible – This guide supports operators and destinations to embed inclusive approaches to

tourism management, to increase knowledge and to deliver on legal obligations.

- **Building a Resilient Tourism Industry: Queensland's Climate Change Response Plan** – Climate change is a risk and an opportunity too big to ignore. The strategic plan is underpinned by ambitious actions to support Queensland's tourism industry proactively respond to climate change and lead the way as a steward for its environment.
- **TEQ Events Strategy 2025** – provides a platform to realise the TEQ vision of inspiring consumers to visit Queensland to experience the best events in Australia. There are three fundamental pillars – leveraging the competitive advantage of TEQ, strategic partnerships with destinations and events and agreement on metrics to inform optimal event investment.

Local

Building Better Communities Beyond 2030 – Fraser Coast Regional Council

A blueprint for the regional future to 2030, pillars of education and job readiness, business investment, community connections and enabling infrastructure to drive the strategic focus of the region.

Overnight Visitor Targets

The State Government's *Towards Tourism 2032* plan outlines ambitious targets for overnight visitor expenditure, to reach \$34 billion per annum by 2027 and \$44 billion per annum by 2032.

To achieve this goal, actions align to the pillars of Demand, Supply and Connectivity; Catalyst for Change; and Enablers of Change according to the three distinct phases to rebuild and revitalise the Queensland visitor economy.



Economic Value

Tourism is a major economic driver across the region, accounting for \$387.5 million Gross Regional Product and \$47.5 million in taxes in the 2021 financial year (FIGURE 1). The industry supports more than 5,000 jobs across accommodation, food and services, touring and transportation. The community considers that tourism has a positive impact as a whole with the Fraser Coast community **73%** in agreement compared to the Queensland average of 45%.

FIGURE 1: ECONOMIC IMPACT OF TOURISM FRASER COAST

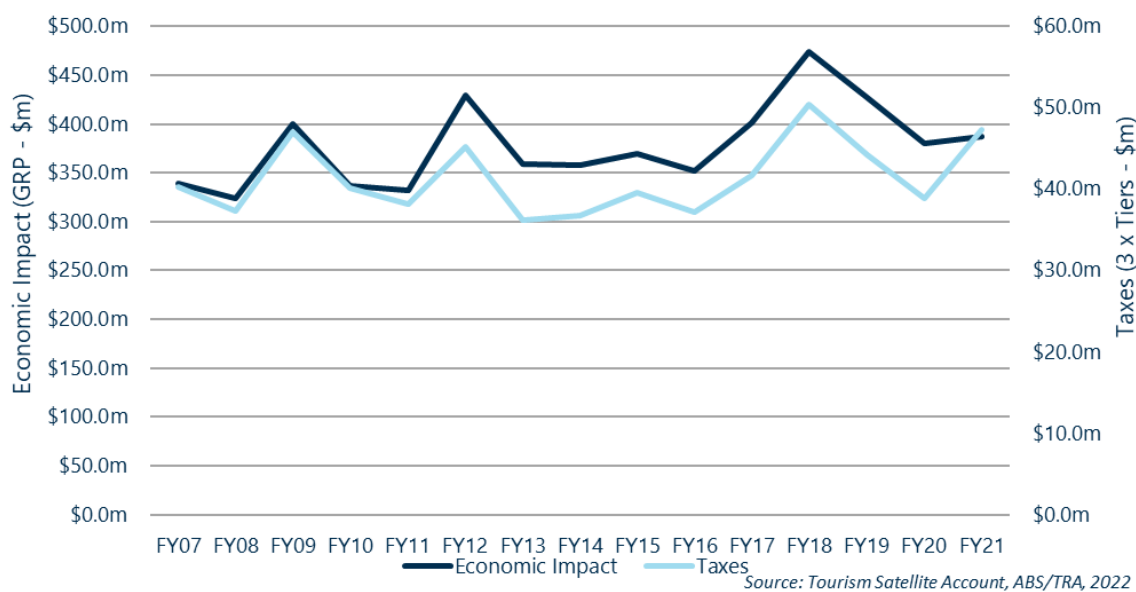
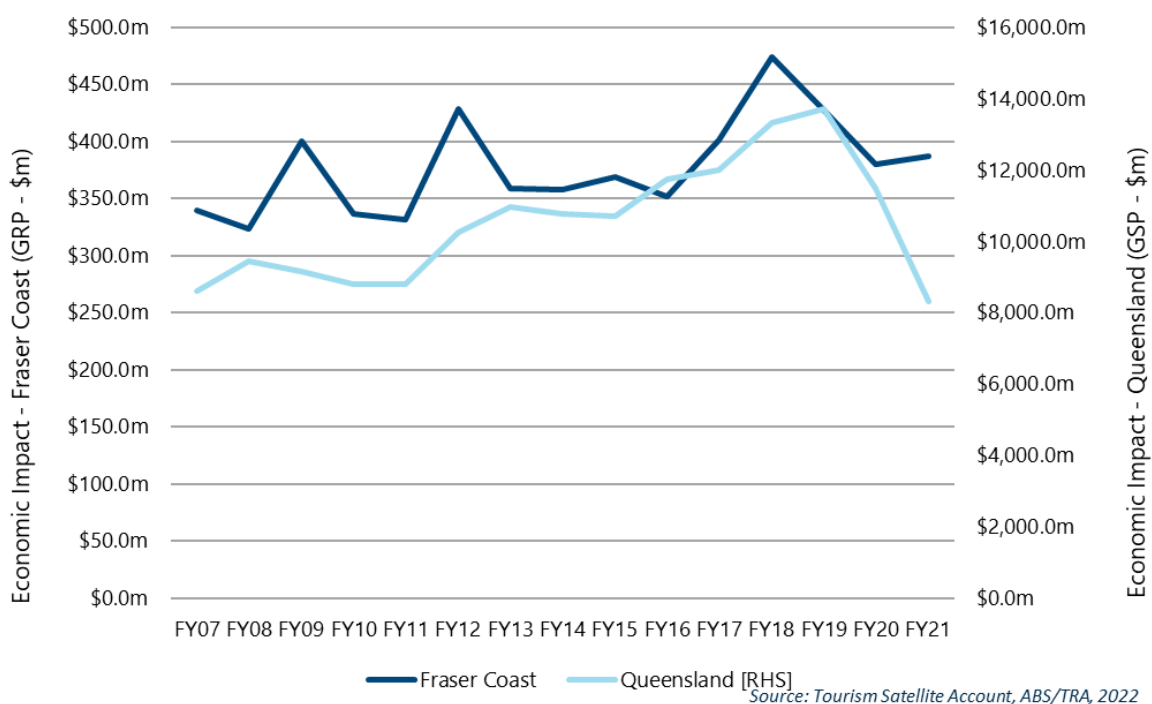


FIGURE 2: ECONOMIC IMPACT FRASER COAST AND QUEENSLAND



Tourism also brings indirect economic contribution with wages, salaries, profits and taxes generated from a broad array of businesses that visitors engage with across the region, including education providers, petrol stations and marine operations.



Trends Impacting the Visitor Economy

Traveller's perceptions, concerns and values have continuously transformed over the years, with the post-COVID-19 recovery seeing an increase in sustainability and wellness among other trends. Whilst impossible to forecast accurately, this list identifies emerging and current visitor trends that will shape travel over the next 5 years.

Conscience consumers – increasing consumer awareness around sustainability has led to growing environmental and social concerns globally. This has influenced people's interest in adopting more sustainable habits and maintaining these when travelling. Booking platforms are making it easier for travellers to book sustainable trips through transparency, validated badges and filters.

Travelling for wellness – Travellers are seeking more than typical wellness experiences such as spas, retreats and thermal springs; they are now also seeking to continue their own wellness lifestyle during travel. This lifestyle could include healthy eating, fitness routines, mind-body practices, nature experiences and connections with the local people and culture.

Emotional experiences – Travellers are seeking a richness of experiences, to expand knowledge, feel connection and engage with culture and heritage. Consumers are searching for emotional opportunities, making areas like social sustainability engagement just as important as environmental. Customers are less likely to be forgiving if expectations are not met.

Keeping it local – Travellers are seeking local food and beverage at regional destinations where community is at the centre of the experience, with research indicating 85% of Australians are willing to pay more to support local¹. Localised supply-chains and showcasing regional flavours will continue to be important as we emerge from this era.

Camping and caravanning – the increasing diversity of camping, glamping and caravanning has opened a range of markets – from sleeping in an unpowered camp site, to romantic glamping tents, to million-dollar mobile homes. The popularity of these options has grown significantly with the desire for holidays in remote location, to detox from digital and have the road trip of a lifetime.

Blended travel – People are placing a higher value on their time and flexibility, while holding differing expectations to work-life balance, technology and job security compared to previous generations. This has resulted in a surge of blended travel. Growing from "bleisure", the blended traveller spectrum is wide, including remote workers, digital nomads, corporate retreaters and working family holidaymakers.

¹ KPMG. 2020. <https://home.kpmg/au/en/home/insights/2020/07/7-consumer-behaviours-post-covid-19.html>

Digital is the way – Keeping up to date in itinerary changes, accessing booking information, travel guides and making payments, consumers are never far from their digital device. Accessible, online services are now a must to meet consumer demand. The ability to connect becomes a core consideration for destination management organisation and operators to meet these growing expectations.

Nature-based – Getting back into the outdoors with hiking, biking, rafting and climbing are increasing in popularity. Memorable experiences that facilitate personal growth or rejuvenation are now sought by consumers.

Sustainability on a pathway to decarbonise – Year-on-year growth is being seen in demand for sustainable tourism opportunities. Booking.com's consumer insights show more than 80% of people are actively seeking sustainable accommodation. With global commitments to net zero, monitoring and reporting emissions, accelerating decarbonisation and engaging in carbon removal skills is becoming business as usual.

Safety and hygiene – Whilst social distancing and mask wearing may no longer be mandatory, safety and hygiene is still foundational to the success of a destination. Fraser Coast maintaining its perception as a safe haven will position it well in the lead up to the Olympic and Paralympic Games.

Travelling with pets – Off the back of mass pet purchases during COVID-19 lockdowns, we are now seeing an increasing number of travellers wanting to bring their furry friends with them. Pet-friendly accommodation and pet sitting services will make the decision to travel easier.



Fraser Coast's Visitor Profile

Domestic Market

As of December 2022:

- **820,000** domestic overnight visitors (↑ a record for the region, 17.8% above previous year)
- **738,000** domestic day trip visitors (↑ 16.0% from previous year)
- **3,229,000** domestic visitor nights (↑ 23.7% from previous year)
- Average length of stay **3.9** nights (↑ 5.0% from previous year)
- Visiting for holiday (**50%**), visiting friends or relatives (**28%**), business (**12%**) and other (**10%**)
- Domestic visitor expenditure peaked at **\$764 million** (↑ 66.4% from previous year)
- Capturing **2.3%** of all domestic travel within Queensland (↑ 0.7% from previous year)

Figure 3 Fraser Coast Domestic Visitation 2019-2022

The Fraser Coast domestic visitor market reached 1,558,000 visitors in 2022, with strong year-on-year recovery from the initial impacts of COVID-19 in 2020 (Figure 3). While overnight visitors reached 820,000 and have exceeded 2019 levels, day trip visitors are lagging at 728,000 – a 20% decline on 2019 levels. Despite this, recovery is on a positive trajectory.

Total market share on Queensland visitors increased to 2.3% in 2022.

Further, a shift in visitation has occurred when comparing 2019 to 2022 levels. The majority of visitors in 2019 were day trippers, while more than 50% of visitors in 2022 stayed overnight. Overall, this demonstrates there a resilient overnight market across the region and growing demand.

This is seen again in domestic visitor nights, with 2022 reaching 3,229,000 in comparison to 2019 at 3,066,000. Domestic overnight visitors have become the majority accounting for 51% of all visitors and exceeding 2019 figures.

Average length of stay (ALOS) has declined slightly, from 4.0 nights in 2019 to 3.9 in 2022, however shows a positive trajectory when compared to 2020 and 2021.

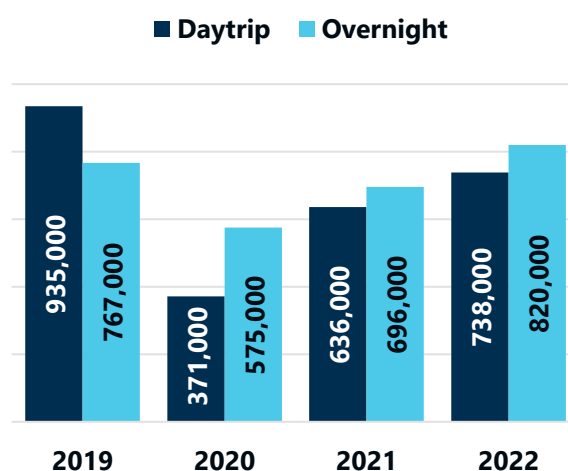
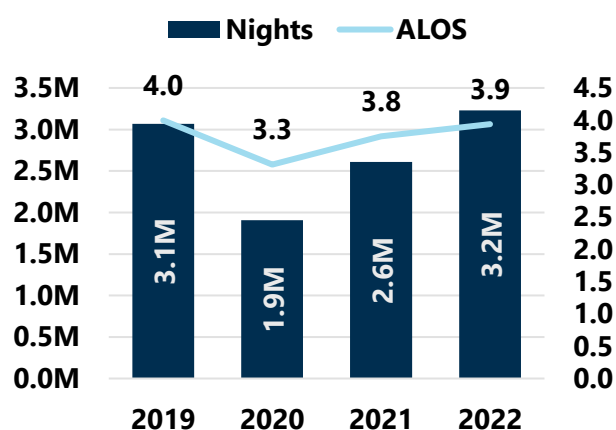


Figure 4 Fraser Coast Domestic Nights and ALOS 2019-2022



Post COVID-19 all markets are under review. Some traditional markets can be expected to gradually return to 2019 levels while others will change to reflect new economic and social conditions.

Young families as a share of total visitors have been consistently performing around the same level for the last 10 years. This situation is reflected in regions like the Gold Coast where young families are the core target market, however they have been a minority share for at least 15 years. Fraser Coast has a larger share of young families in the Visiting Friends and Relatives (VFR) sector, increasing from 9% of holiday visitors to 12% of VFR (this also lifts the total visitor share). When younger families are added to older families, the share increases, however the travel behaviours between the two can be very different.

Older SINKS and DINKS are also the dominant market for the Fraser Coast as they are for much of Australia. Older SINKS and DINKS are more mobile, not limited by school holiday periods (other than to not travel) and they spend more across more sectors. Since the end of the pandemic and borders re-opening, older SINKS and DINKS have been a key component of the recovery through strong visitor growth and even stronger spend growth. It's not so much "high value traveller" as "high value travel" – and older SINKS and DINKS are trying new experiences, spending on little luxuries, and generally indulging themselves. This high yielding market is attractive to the Fraser Coast; however visitor expectations need to be met through the experiences and accommodation on offer.

Like grey nomads, young families can be a highly visual segment due in part to the obvious movement of caravans, camper trailers etc in smaller communities and not often the robust behaviour of young children. The Fraser Coast segments by share are reasonably close to the state averages as per the table below. The most obvious differences between the two is younger SINKs declined in both over the pandemic, however it was greater in the Fraser Coast. Older SINKs and DINKs increased in both; however, it is relatively much stronger in Fraser Coast. Young Families remained reasonably static in the Fraser Coast, however the share declined at the state level (and national level), with cautious families holidaying much closer to home.

Holiday Visitors Segments by Share	Fraser Coast		Queensland	
	Pre-pandemic (Avg 2017-2019)	Post-pandemic (Avg 2020-2022)	Pre-pandemic (Avg 2017-2019)	Post-pandemic (Avg 2020-2022)
Young SINKs/DINKs	8%	5%	12%	11%
Older SINKs/DINKs	21%	26%	25%	27%
Younger Family	9%	9%	12%	10%
Older Family	21%	23%	23%	24%
Empty Nesters	41%	38%	28%	29%

Domestic Visitor

The typical domestic visitor can be identified by a range of key demographics²:

- **Visiting for a holiday.** Half of all domestic day trip and overnight visitors came to Fraser Coast for leisure.
- **Empty Nesters.** More than a third of visitors are empty nesters with visitors predominantly 55+ years.
- **Male and female.** Genders are evenly split.
- **Annual household income between \$0 - \$99,000.** Accounting for more than half of all visitors.
- **Staying overnight.** More than half of visitors stay overnight.
- **Staying in both private and commercial accommodation.** An even split between overnight visitors stays in private and commercial accommodation. A slight increase for commercial accommodation since 2019.
- **Intrastate visitors from outside of Brisbane.** 85% of overnight visitors are from Queensland, within that 80% are from outside Brisbane LGA.
- **Visiting in summer.** More than a quarter of visitors visit in December, January and February, with January the busiest month.
- **Day trip visitors spend on average \$144 per trip per person.**
- **Overnight visitors spend on average \$802 per trip per person.** That is an average of \$204 per day.
- **Enjoying nature-based activities.** Visiting the beach and going for walks through National Parks are the most popular activities.



² NVS rolling average 2020 to 2022

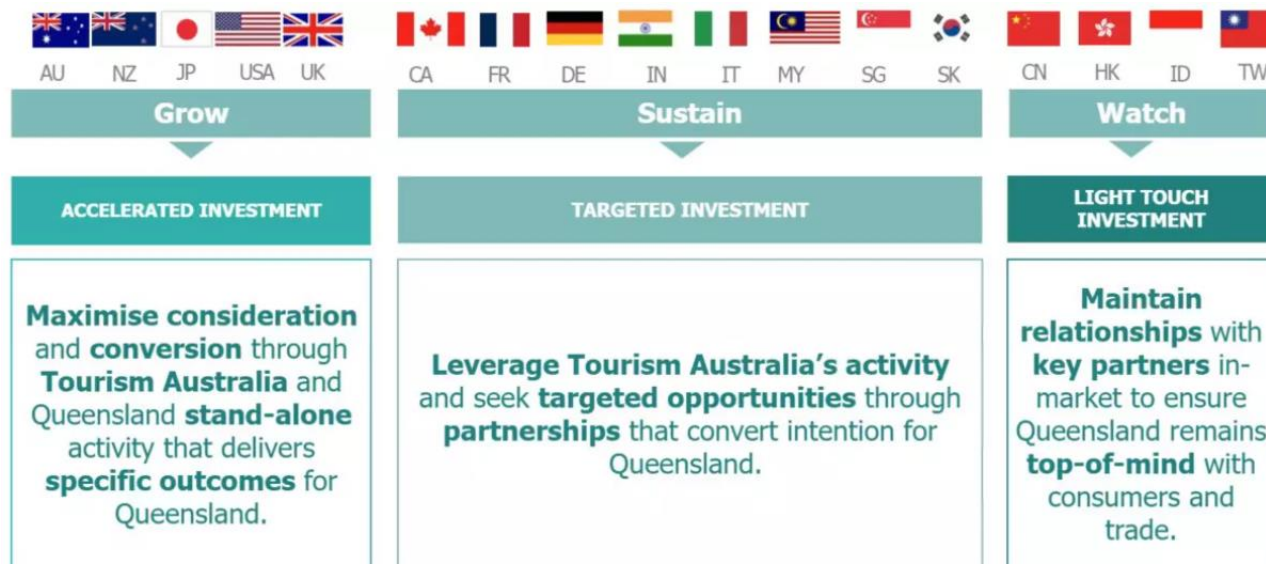
International Market

The international visitor market has begun recovery after the lifting of border restrictions in early 2022, however there is a steep road ahead before visitation reaches pre-COVID-19 levels. In 2022 34,687 international visitors were welcomed for 212,204 nights, accounting for 27% of 2019 levels.

It is expected by 2025 the international market to Australia will reach pre-COVID-19³, however source markets are showing uneven recovery with some countries returning quicker than others. Fraser Coast international visitors are predominantly from western markets, with the UK and Europe making up 74% of all international visitors across the region in 2019. These markets are forecast to reach 2019 levels by 2025, however geopolitical and economic uncertainty across UK and Europe may negatively impact rate of return.

Tourism & Events Queensland (TEQ) is working in partnership with Tourism Australia (TA) in marketing, re-positioning, and attracting visitors to the state, driving international recovery⁴. This is facilitated by relationships on and off-shore. TEQ is tailoring messaging towards various source markets based on trends and consumer sentiment. Marketing campaigns including 'Working Holiday Maker' and 'Say G'day the Queensland Way' were aimed towards stimulating key source markets. Further accelerated marketing investment towards the domestic market, New Zealand, Japan, USA and UK will start to shift visitation to the Fraser Coast (Figure 5).

Figure 5 TEQ Source Market Prioritisation



³ Tourism Research Australia Tourism Forecasts for Australia 2022

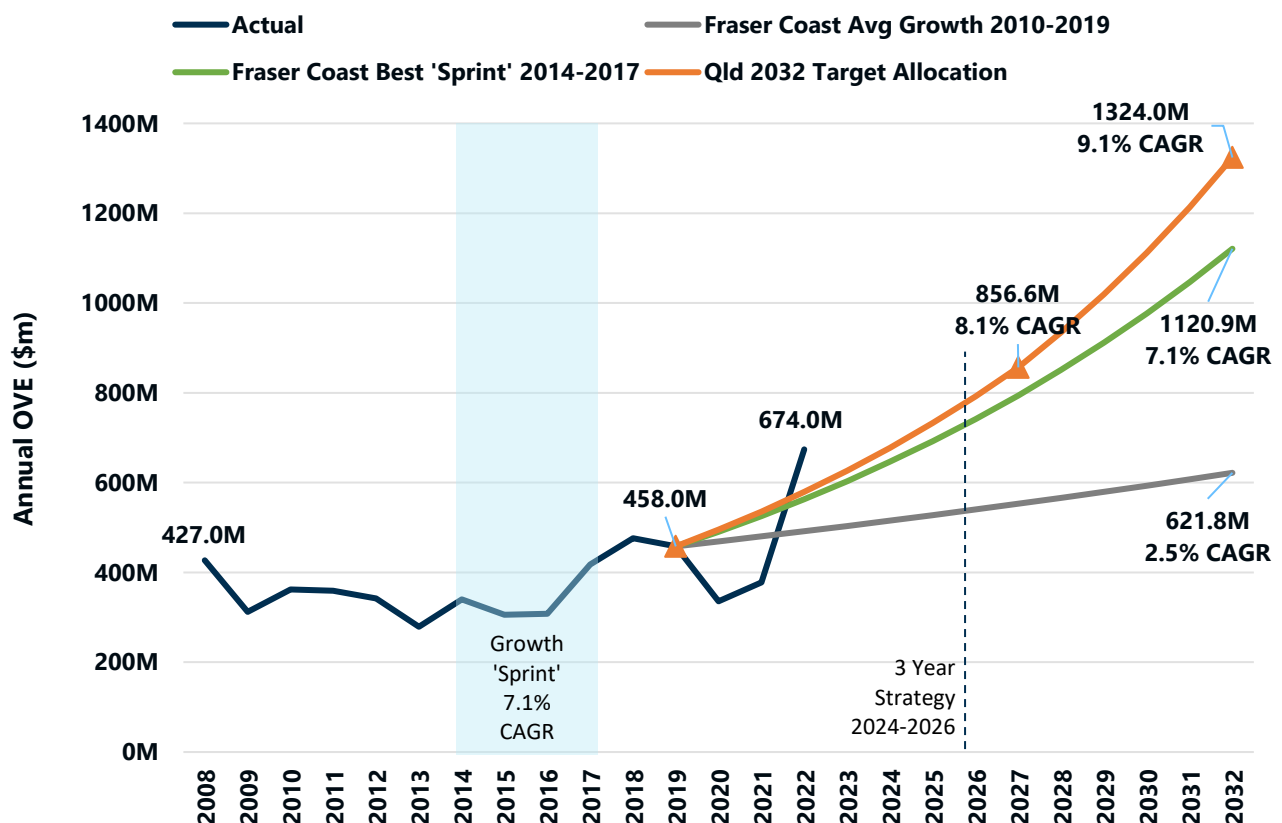
⁴ International Marketing Opportunities | Tourism and Events Queensland

Fraser Coast Aspirational 2032 Target

Through this DMP Fraser Coast will play an active role in its support of the actions and targets outlined in the State plan – *Towards 2032: Reshaping Queensland's visitor economy to welcome the world*. However, Fraser Coast's contribution is dependent on several variables:

- Destination visitation figures continue their strong track, exceeding 2019 figures in the year to December 2022;
- The substantial increase in Queensland intrastate travel during the pandemic will remain;
- The Fraser Coast retains access to its current level of annual State and Local Government funding (\$2.3m);
- The region builds back to its pre-2019 share of pre-pandemic visitation from Europe, the UK and North America;
- The Fraser Coast is successful in developing a new market from New Zealand, leveraging the Sunshine Coast International Airport;
- All growth factors will be even across the state.

Figure 6 Fraser Coast Allocation – State Aspirational 2032 Target | OVE Growth Rate Comparison (2019 start)



Source: TEQ 2032 Target; NVS/IVS, TRA 2023

- **Orange – State aspirational target – 2019 start**
 - 2019 Actual – 2027 milestone: 8.1% CAGR
 - 2027 Milestone – 2032 Target: 9.1% CAGR
- **Grey – Average growth 2019-2032 based on FC actual 2010-2019 Compounding average growth: 2.5% CAGR.**
- **Green – Average growth 2019-2032 based on FC actual 'growth sprint' 2014-2017: 7.1% Compounding average growth.**

03 – Tourism Opportunity

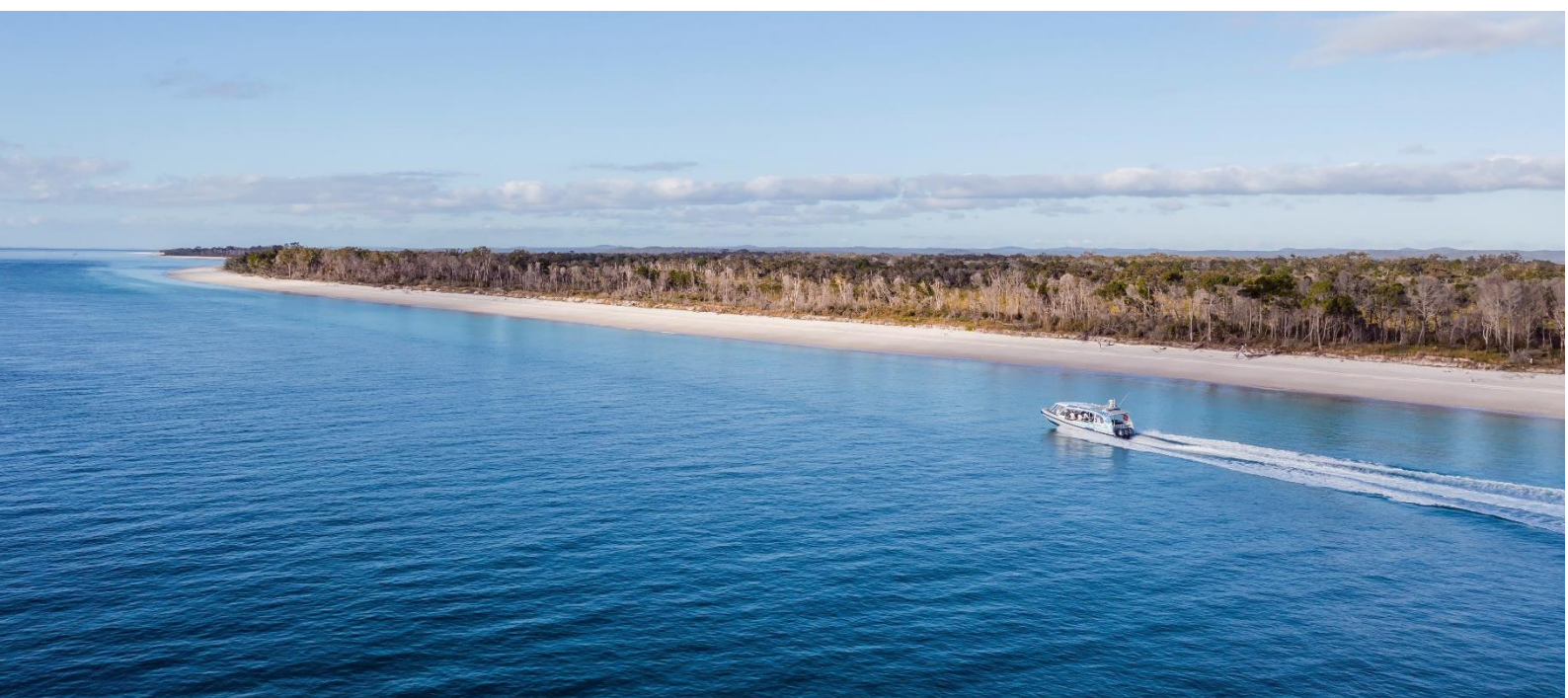
The international and domestic marketplace has become extremely competitive for all travel markets post COVID-19. In addition to well financed marketing campaigns from other regions, the needs and expectations of visitors have also changed. There is now a stronger focus on health and wellbeing, an interest in safe, nature-based locations and a desire for transformational experiences that connect visitors to both the community and place. Visitors are not only wanting unique ways to experience the places they visit but they are seeking bragging rights and stories that they can share with their friends and family. These expectations provide an opportunity for the region given the strength of its nature based, adventure and heritage products and experiences. This DMP recognises that new private and public investment is needed in the region to both refresh existing product and to build new products and service infrastructure if the region is to support new growth.

Recent market research commissioned by TEQ confirms that the Fraser Coast region has a strong nature and adventure-based brand with a high awareness in international and domestic markets. Seasonality has been a challenge in the past particularly with respect to whale watching season. One focus area in the DMP is to work with operators to help develop and deliver year-round marine and terrestrial activity sets and experiences that leverage the World Heritage status of K'gari (Fraser Island), the region's wildlife and fauna and the significant national parks and conservation reserves. A dedicated marketing transition strategy is needed together with the resources to help the region to guide and manage the transition of the island to K'gari over the next 10 years.



COVID-19 has helped to highlight that the Fraser Coast provides a safe and accessible holiday and leisure travel option for South-East Queensland markets. Domestic visitation to the region has built back beyond 2019 levels and this has been achieved through the continued patronage of younger and older families, empty nesters and the growth of the senior travel market who now have the time and resources for both short breaks and extended holidays. Opportunities exist to extend into southern markets to capitalise on the strong awareness and to offer an alternative to traditional Queensland escapes. The drive market continues to be most important to the region and planned improvements to the regional road network will support further growth in the lead-up to the Olympic and Paralympic games. Improved way finding, themed drive trails, service infrastructure for recreational vehicles (RVs) and consistent digital marketing will support the growth of this market.

The DMP recognises the significant role played by resource management, conservation and parks agencies in managing tourism visitation to the region's parks and reserves. This is particularly important in the Fraser Coast given the World Heritage status of K'gari, the sheltered waters of the Great Sandy Marine Park, the presence of Ramsar wetlands and the Great Sandy Biosphere Reserve. It is vital if the Fraser Coast is to achieve its 2032 targets that state resource management agencies develop a visitor experience focus and a joint commitment with tourism bodies and tour operators in supporting sustainable, responsible and regenerative tourism.



04 – Situational Analysis

Operators across the region identified the following strengths and areas for improvement:

STRENGTHS	LIMITATIONS
• Adventure and nature-based experiences • World Heritage listing • Biosphere • Indigenous history & culture • Proximity of Southern Great Barrier Reef (Lady Elliot) • Wreck and reef diving • Scientific and research initiatives • Experienced guides and operators • Marine activities (year-round) • Regional events • Access to key markets in South-East Queensland • Military history and heritage assets (Maryborough) • Year-round warm climate	• Public transport services • Land-based family friendly activities • Geographic and seasonal dispersal of visitors • Early hospitality shut down with limited food and beverage after 9pm • Lack of bookable heritage and wellness experiences • Limited visibility on visitor numbers on K'gari • Changing visitor mix with new demands • Stakeholder support and understanding of tourism • Indigenous product development
OPPORTUNITIES	CHALLENGES
• Pipeline of public and private investment • Voluntourism/science-based tourism • New mainland nature and ecotourism experiences • Cultural story telling • K'gari Cultural Tourism Plan • Airport activation • Fishing, including big game • Development of bookable heritage products (Maryborough) • Media partnerships • Drive market partnerships • Events and sporting facilities • Olympic and Paralympic Games opportunities • Development of local food	• Dated and insufficient accommodation • Lack of guided access/experiences on K'gari (terrestrial & marine) • No restraints on FITs on K'gari • Underfunding of parks and park management • Variable customer service • Workforce attraction • Climate change including extreme weather events • Visitor safety • Environmental management of key sites • Competition from other regions • Marine stingers, including Irukandji

STRENGTHS –**Proximity to South-East Queensland market**

With a population of 3,817,573 within an hour radius, Fraser Coast has significant market opportunity. The region has a strong offering of a diverse range of experiences, a rich culture and depth of natural attractions.

Adventure and nature based experiences

There is a strong awareness of adventure and nature and wildlife experiences in key visitor markets. With the Fraser Coast's central location within the Great Sandy Biosphere and connecting to the southern biospheres in Noosa and the Sunshine Coast, the region has a strong natural attraction.

World Heritage Listing

A World Heritage Listing symbolises the outstanding universal values that are present. Places recognised with a World Heritage Listing are the most remarkable places on earth. They are

recognised on a global scale for the importance of the natural and cultural significance. K'gari's recognition is for its 250km of sandy beaches as the largest sand island in the world and its significant geological and biological processes. The listing presents conservation and communication opportunities for visitors.

Care for Country

The Butchulla People have a strong connection and care for country, they offer stories and lore that present a depth of understanding of the region. Indigenous product development on the island presents a significant tourism opportunity in a meaningful way.

Citizen science

From the whale research and interpretation centre to biodiversity initiatives, the science and research undertaken within the region present it as a leading destination.

Quality of guides

With high quality marine guides and land-based tour operations, the region has a wealth of operators who deliver exceptional high-quality experiences, sharing their knowledge with visitors.

Marine activities

Whether fishing, whale watching, sailing or diving, the year-round marine activities in the sheltered waters around K'gari present exciting and immersive activities for visitors. The Fraser Coast is recognised as one of the most diverse fisheries in Australia with an overlap of northern and southern species.

Regional events

Food and wine, heritage and the Whale Festival are an array of demand driving events building community pride and delivering reasons to visit. School-based sport events are a developing niche.

OPPORTUNITIES –**Pipeline of public and private investment**

Through Fraser Coast's Economic Roadmap, the region has a clear investment attraction strategy that builds on the region's competitive

advantage. Priority projects such as upgrades to the Bruce Highway, the Hervey Bay and Maryborough CBD upgraders, the Whale Interpretation Centre and sporting and recreational

facility upgrades strengthen regional attractiveness through high-quality, activated infrastructure. As planning is prioritised, the opportunity to differentiate precincts and villages should

be considered to create unique and interesting reasons for visitor dispersal.

Voluntourism and citizen science

As visitors become more interested in regenerative efforts and leaving places, they visit better than they found them, there is significant opportunity to further develop citizen science programs (e.g. Happy Whale) to create a connection with visitors that will keep them coming back for years to come. The proposed Whale Interpretation Centre will offer a strong base for these activities. Making them accessible to visitors will be pivotal to the success.

Geographic and seasonal dispersal

Increased access to the western beaches of K'gari offer the potential to reduce some of the overcrowding issues on the island and to reduce the pressures on the delicate eco-systems. Promotion of the "off-the-beaten track" options and mid-week stays may even

some of the seasonality challenges and present opportunities to more effectively manage the island.

Experience development

Development of new nature-based (fishing, mainland tours etc) and wellness (biodiversity tours, forest bathing, spas etc) experiences across the Fraser Coast will provide more ways for visitors to engage with the destination. Identifying ways to create bookable experiences at existing natural attractions will increase regional yield and improve visitor management.

Indigenous storytelling

The history and culture of the Butchulla People offers a rich and engaging story for visitors. Working to integrate cultural storytelling, where appropriate, will facilitate a deeper understanding of the region and its significance.

Transport

Connectivity is critical to driving the success of the region. Continued advocacy to improve the Bruce

Highway, clear wayfinding and rest stops add to the visitor experience. To reach the ambitious growth targets set by the Towards 2032 Strategy, aviation attraction will also be required through strategic routes that align with the values of the region.

Partnerships

Media partnerships with key publications such as National Geographic will elevate the positioning of the region and attract markets aligned to the values of conservation. Regional partnerships with neighbouring biospheres to present a unified market proposition that transcends geographic boundaries will facilitate strategic marketing opportunities.

Olympic and Paralympic Games

On the runway to 2032 the Fraser Coast will realise opportunities to host Olympic teams, acclimatising pre-Games and provide compelling tourism opportunities to world travellers attending the Games.

LIMITATIONS & FOCUS AREAS –

Family friendly

As the core market for the Fraser Coast shifts, consideration needs to be given to the types of experiences that appeal to the new market. Family friendly parks, gardens and activities should be prioritised, including the

additional services that turn free activities (parks) into experiences that benefit the economy (e.g. coffee vans or ice cream stalls).

Visitor information servicing

The location and provision of visitor information services

(including the Visitor Information Centres) need to match the need and expectations of visitors. Creating reasons to pull off the highway and offering accessible visitor information about all the opportunities within the region is critical.

Bookable experiences

The development of more bookable experiences that can be packaged to create itineraries for visitors is required to keep visitors for longer and to encourage spend.

Accurate visitor numbers

You can't manage what you don't measure. The lack of accurate visitor statistics for K'gari (Fraser Island) make effective visitor management a challenge. Adopting new ways of measuring visitor numbers and using this to strategically market and manage will become an important focus.

Stakeholder support

Tourism is for everyone. Building community awareness and understanding for the value and importance of the visitor economy will support the visitor experience. Further understanding of how the visitor economy can be used as a force for good may also facilitate improved relationship with QPWS and other key stakeholders.

Local food

Delivery of fresh local produce in a way that engages visitors is lacking.

Market expectations in relation to fresh seafood are not currently delivered. Matching expectations and realities across the culinary sector are increasingly important.

Variable customer service

Visitors are seeking experiences that surprise and delight. A consistent level of quality service is required to meet and exceed these expectations. Variability in service delivery will not result in positive reviews and repeat visitation. Upskilling staff to match these expectations is a priority.

Climate change

Our changing climate is causing significant issues for the Fraser Coast region. Coastal erosion, natural disasters and the movement of species such as Irukandji jellyfish create threats to visitor safety in the region. Responding to these challenges, preparing industry for natural disasters, communicating with guests for their safety and tourism playing its part in global commitments towards decarbonisation will play an important role moving forward.

Management of national parks

Pressures on the natural resources within the region, overcrowding at peak times and a balance between conservation and the benefits that tourism can bring need to be managed.

Community engagement and support

The visitor economy is a vital part of a thriving Fraser Coast, to effectively deliver an experience that transforms and delights, all stakeholders – community, government, and businesses – need to understand the role of the visitor economy, and the economic, social and environmental benefits that a well-managed visitor economy can deliver.

Aging accommodation

To reach the aspirational goals, the Fraser Coast requires suitable accommodation to support growing demand. This includes a quality of accommodation that meets the expectations of visitors. A refresh of aging accommodation in the region is required.

Enablers & Catalysts

Investing in future strategic and catalyst tourism infrastructure is essential for driving demand for tourism and enhancing the Fraser Coast region's appeal as a destination to live, work and play. There are eight key enablers that serve as a foundation for Fraser Coast's future growth:

- | | |
|----------------------------------|--|
| 1. Generating Demand | 5. Quality & Service |
| 2. Brand | 6. Sustainability |
| 3. New Product Investment | 7. Authenticity |
| 4. Events | 8. Co-ordination & Leadership |

FCTE and the Fraser Coast Regional Council will continue to work together with key partners to bring future catalyst projects to life that promote a thriving visitor economy. Through consultations with industry stakeholders, nine catalyst projects have been identified:

1. Fraser Island / K'gari brand transitioning in place (5 years +).
2. Whale interpretation and education centre.
3. Investment prospectus (3 or 4 star hotel+).
4. Marine Mecca product suite (new / refreshed - 365 days).
5. Australia's Nature Coast Partnership in place.
6. Visitor management plan for K'gari.
7. Indigenous tourism strategy (hinterland / island).
8. Rail trail and drive circuits in place.
9. Backpacker, access and accommodation.

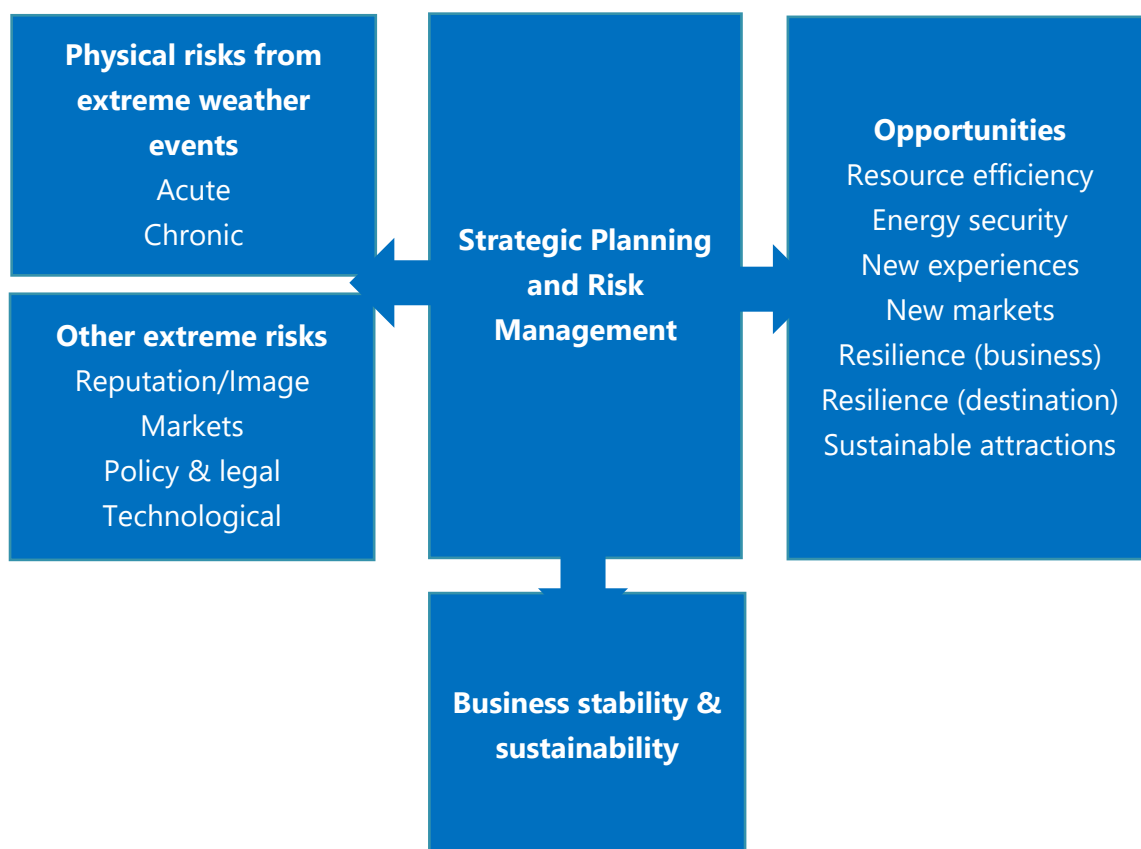
05 – Risk and Crisis Management

The changing climate, geopolitical landscape, cyber security issues and consumer expectations create risks and opportunities too large to ignore. Shifts in regulatory environment around climate response, increasing insurance premiums, increasing cost of energy and the potential for mandatory carbon reporting and disclosure will alter the tourism industry's focus over the coming years.

For Fraser Coast, key risks include:

- Climate and weather – Riverine flooding, severe weather events, cyclones, wildfires, coastal inundation from storm surges and heatwaves.
- Geological – earthquake, dam emergency events (flooding, chemical spills, piping failure, earthquake, and terrorist/high energy impacts).
- Transport incidents – air, rail, road or marine.
- Tourist related incidents – death, significant injury, fatal marine sting.
- Health related – pandemic, epidemic, biosecurity.
- Cyber – data breach, hacking.

The risks outlined may cause physical, financial, and reputational damages across the Fraser Coast. A Crisis Management Plan needs to be prepared with Fraser Coast Council.



Planning for the Carbon Economy

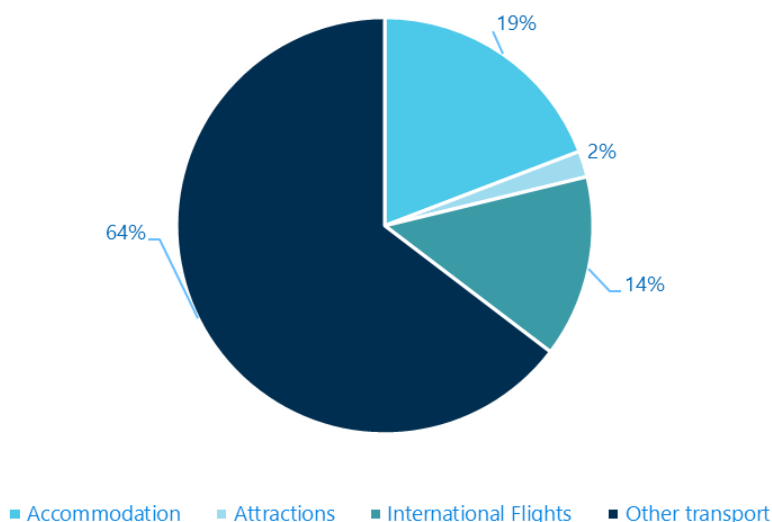
The Fraser Coast region visitor economy has a total footprint of **174,921t CO₂-e**.

Transportation, in particular domestic flights and road travel, account for the largest proportion of the regional profile, with accommodation and international travel following. Tourism attractions account for the lowest proportion of emissions, however every operator in the region has a role to play in the pathway to decarbonise.

To reach the Queensland Government's commitments, the region requires a **34% reduction** in emissions by 2030. To achieve this, awareness, engagement, and action is required across all of the visitor economy.

Like the aspirational growth targets for the region, the achievement of this goal requires the coordination and collaboration of all stakeholders across the industry.

As we look to balance the reduction outcomes with restorative opportunities, Fraser Coast has the opportunity to engage visitors in restorative activities aligned to the preservation, conservation and enhancement of the biosphere and World Heritage sites. The following opportunities were highlighted for the industry:



Transport

1. Sustainable aviation fuel.
2. Electric vehicles – personal vehicles/buses that are fully electric with charging infrastructure.
3. Accelerate adoption of renewable energy in transport – green hydrogen production (small/large scale) for hydrogen vehicles/marine/house charging/storage to displace traditional fuel - fuel cell bus service.

Energy Generation

1. Switch to renewable energy.
2. Community or precinct owned or operated microgrid - PV options with battery storage or PPA with a renewable source.
3. Energy storage planning and development (thermal, Li-ion, Sodium batteries, etc.).

Energy Efficiency

1. Net zero building design – Daylighting, maximum insulation, electrochromic glass/films, passive solar design, and advanced heating and cooling.
2. Electrification – Movement of transport, appliances, heaters, cookers and devices to electric.
3. Existing building and equipment improvements – Air flow, insulation, solar powered air cavity fans, cooler insulation, thermoscan, air curtains, high volume low flow fans, etc.

Water

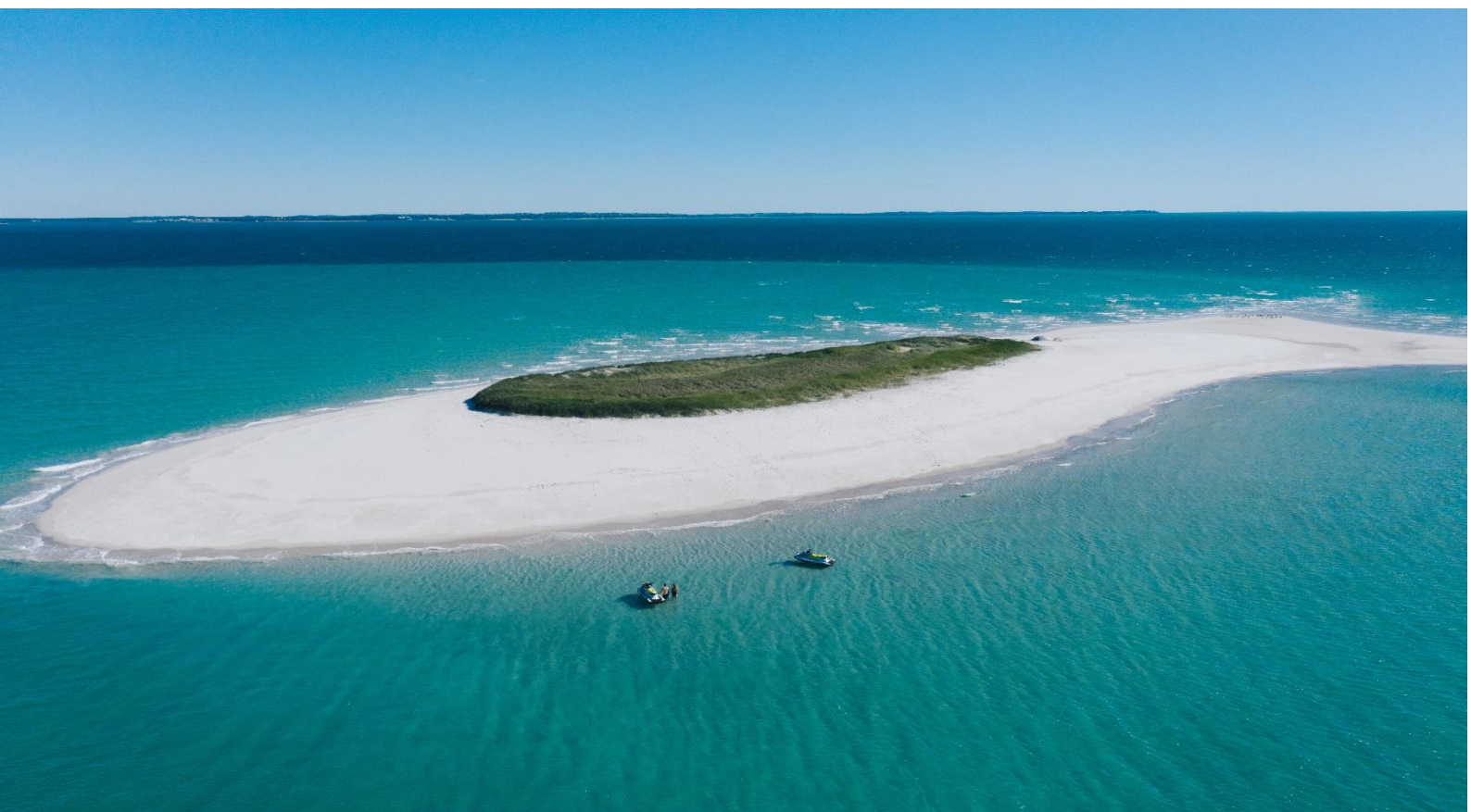
1. Water efficiency education.
2. Greywater system (wastewater capture, filtration and use) and black water systems (compostable toilets).
3. Real time water monitoring – usage, patterns, leak detection.

Waste

1. Circular economy projects – Design, implement, and monitor to eliminate waste (return to source, fast bio breakdown, separation of bio and technical e.g. Wood key card with RFID. Use of ASPIRE Waste network.
2. Zero waste – Design, phase out single use items such as plastic.
3. Packaging reduction management plan (full supply chain).

Resilience

1. Revegetation – Dune grass, terrestrial, mangrove, seagrass, corals.
2. Localised food production – hydroponic and aquatic farms, community gardens, livestock.
3. Localised responsible carbon offsets that have multi-factor benefits to ecology and community.



06 – The Strategy

VISION

Globally recognised for World Heritage Listed K'gari (Fraser Island), world-class personal natural encounters, a rich Indigenous and European heritage and delivering Australia's No 1 Whale watching experience.

CORPORATE VISION

Australia's leading nature, adventure, and heritage tourism destination.

ORGANISATION PURPOSE

A strong and resilient visitor economy supported by the community and delivering sustainable economic returns for local businesses.

DESTINATION POSITIONING

Delivering the best year round nature, marine and heritage-based adventure experiences that Australia has to offer.

- *World Heritage listed K'gari (Fraser Island) with its strong Indigenous history, its pristine beaches, majestic rainforests and unique flora and fauna in untouched wilderness.*
- *Proximity to the Southern Great Barrier Reef with spectacular wreck and reef diving and sailing.*
- *The world's first Whale Heritage Site with Australia's best whale watching.*
- *A safe, clean and accessible destination surrounded by the sheltered waters of the Great Sandy Marine Park and bordered by a rural hinterland.*
- *A rich military, industrial and agricultural history which comes to life through events, attractions, and festivals.*

STRATEGY AREAS

Destination Marketing | Destination Stewardship | Experience Delivery

PERFORMANCE INDICATORS

- Growth of target markets (Queensland market share).
- Contribution to Queensland's \$44B stretch target to 2032.
- Length of stay / spend.
- Seasonality reduction.
- Visitor satisfaction.
- Community sentiment.
- Partner / stakeholder satisfaction.
- Increasing share of international visitors.
- Accredited businesses.
- Benchmarks including Best of Queensland Experiences.

Priorities for Success

Aligned to the *Towards Tourism 2032 Strategy*, to sustainably grow and accelerate tourism on the Fraser Coast we will focus on our strengths whilst addressing gaps to create a successful future:

DEMAND, SUPPLY AND CONNECTIVITY	CATALYSTS FOR CHANGE	ENABLERS OF CHANGE
STRATEGIC THEMES  Demand  Supply  Connectivity	STRATEGIC THEMES  Sustainability  Brisbane 2032  Indigenous	STRATEGIC THEMES  Investment & funding  Talent & skills  New ways of working
What success looks like for Fraser Coast in 2032	What success looks like for Fraser Coast in 2032	What success looks like for Fraser Coast in 2032
- The best nature and marine adventure experiences Australia has to offer. - Strong destination awareness for nature and adventure in all markets. - Holiday expenditure growth exceeds holiday visitor number growth (yield). - Holiday visitor, intrastate, older S&D: exceed FC's share of Qld >5% (+1.1% increase). - Holiday visitor, interstate, Older S&D: exceed FC's share of Qld >4% (+1.3% increase). - International adventure market doubles in size. - Successful transition to K'gari retaining awareness and association with World Heritage experiences. - Experience-led brand with leading transformational products and services. - Integrated transport network in place to service all visitor markets (aviation and drive).	- Leading in sustainable, accessible, cultural and responsible tourism experiences. - Recognised ecotourism destination with benchmarking, and certification for all operators. - Climate Change Strategy with pathway towards net zero emissions with Fraser Coast Regional Council. - Decarbonisation offsets established and used to restore biodiversity (mangroves and sea grass). - Working Indigenous tourism strategy with products/experiences operating on both K'gari and mainland. - Nature based and adventure tourism experiences win national and international awards. - Pledge developed recognising connection to country and Indigenous stories. - New Whale Heritage Interpretation Centre.	- Cross government and community support for investment in upgraded and new tourism infrastructure and services. - Australia's Nature Coast partnership working effectively. - High-quality visitor experiences recognised under Queensland's Best of Queensland Experiences. - Investment prospectus delivering new accommodation infrastructure and marine access. - Tourism management plan delivering for K'gari. - New marine experiences in place offering 365 days of delivery (bareboat, youth). - A united vision for tourism with key partnerships in place to deliver economic growth and quality of life for the community. - A skilled workforce with strong educational and training partnerships with local schools and universities.

Key Strategy Pillars

	Strategy Areas	Action	Outcomes
1	Destination Marketing	➤ Target South-East Queensland (400km travel radius). Empty nesters / Older and Young families / International nature and adventure travellers ➤ Target Sydney (direct flights) and Melbourne secondary markets ➤ Promote Australia's Nature Coast Partnership, international focus ➤ Develop new market in New Zealand, leveraging Sunshine Coast international airport, with transport services in place. ➤ Integrated delivery of social media, PR and digital marketing initiatives.	➤ Maintain strong destination and brand awareness. ➤ Successful transition from Fraser Island to K'gari, maintaining international and domestic recognition. ➤ Sustainable visitor growth and spend in target markets spread throughout the year.
2	Destination Stewardship	➤ The coordinated management of the visitor economy to deliver sustainable economic growth and social returns. ➤ Promoting the dispersal of visitors and investment in new and improved products, experiences, and strategic visitor services. ➤ A regional leader in accessible, sustainable, cultural and responsible tourism. ➤ Building strong destination partnerships and support from the local community, industry and government to deliver a quality, visitor first tourism experience.	➤ Leading by example in sustainable, cultural and accessible tourism. ➤ Cross-government support for investment in upgraded and new visitor infrastructure, services and products. ➤ The delivery of high-quality visitor experiences. ➤ A united vision for tourism across the region with key partnerships in place which will deliver economic growth and quality of life for the local community.
3	Experience Delivery	➤ Nature based and adventure tourism with a focus on whale watching, World Heritage wilderness, culture, reef / islands experiences, heritage and marine activity sets across the year. ➤ An events portfolio supporting visitation with an emphasis on filling shoulder periods.	➤ An experience-led brand with leading edge transformational products and services. ➤ Indigenous stories and connection to country. ➤ Internationally recognised nature, marine, cultural, heritage and sustainable tourism experiences.

07 – Action Plan

Actions under this plan are aligned to the State framework with build, evolve and transform timeframes.

Destination Marketing

Aim: to position the region as the proven deliverer of the best nature, adventure and marine experiences Australia has to offer.

	<i>ACTION</i>	<i>LEAD</i>	<i>TIMEFRAME</i>
1.	Marketing and brand development to focus on maintaining the strong awareness of K'gari in domestic and international audiences as a nature based and adventure tourism destination.	<i>FCTE</i>	<i>Immediate & Ongoing</i>
2.	Target South-East Queensland & northern New South Wales drive regions (400km travel radius) as the primary market, with additional focus on secondary markets of Sydney and Melbourne. Prioritise empty nesters/ older and young families/ SINKS/ DINKS.	<i>FCTE & Operators</i>	<i>2023/2024</i>
3.	Drive market campaign to continue with a focus on the promotion and delivery of themed drive itineraries to showcase the region, backed up by integrated social media, PR and digital marketing initiatives.	<i>FCTE</i>	<i>2023/2024</i>
4.	Undertake a dedicated brand transition strategy for K'gari. This requires the support of TA and TEQ and the financial commitment of the State Government and can be expected to take six years.	<i>FCTE, TEQ, State Government</i>	<i>2023-2029</i>
5.	Work with Tourism Noosa and Visit Sunshine Coast to promote the Australia's Nature Coast Partnership with a focus on the three biospheres and adventure, marine and nature-based activities.	<i>FCTE Noosa VSC</i>	<i>2023-2028</i>
6.	Increase Fraser Coast share of New Zealand visitors leveraging the Sunshine Coast international airport	<i>FCTE</i>	<i>2023/2025</i>
7.	Develop a strategy to increase the region's representation at key trade and consumer sales platforms. This includes promoting the Whale Heritage Site and delivering products that are <i>Best of Queensland Experiences</i> . Work with operators to 'hunt as a pack'	<i>FCTE & Operators</i>	<i>Ongoing</i>
8.	Support local operators to embrace digital marketing platforms including social media, Australian Tourism Data Warehouse and existing regional initiatives including drive, rail and food trails. Continue to build a digital library to support media, trade and industry partners to promote high quality images of the region.	<i>FCTE</i>	<i>Ongoing</i>

Destination Stewardship

Aim: A well-managed and sustainable visitor economy with cross government, business and community support for investment in upgraded and new tourism infrastructure and services

ACTION	LEAD	TIMEFRAME
1. Work with Council, Indigenous leaders, community groups and operators to build and deliver a united vision for tourism across the region. Build key partnerships to help deliver economic growth and quality of life outcomes for the local community	FCTE, FCRC Indigenous leaders Operators	2023 onwards
2. Gain cross government and business support for investment in upgraded and new tourism and marine infrastructure and services. Advocate for the development of an investment prospectus to identify products that align with the regions USP and target markets. The investment prospectus needs to map the existing and future supply and demand for accommodation leading up to the Olympic and Paralympic Games.	FCTE FCRC State Government	
3. Advocate for an integrated transport network to promote easy access to the region for all visitor markets, with special focus on international airports in Brisbane and the Sunshine Coast.	FCTE State Government	2023 onwards
4. Develop a dedicated Tourism Management (and Stewardship) Plan for K'gari (Fraser Island).	FCTE State Government	2023-2024
5. Fraser Coast to become a recognised ecotourism destination with benchmarking, accreditation and certification in place for operators.	FCTE FCRC	2024
6. A Climate Change Strategy with clear pathway towards net zero emissions to be developed with Fraser Coast Regional Council. Within this plan a decarbonisation strategy needs to be established. This could also include regional offsets and regenerative opportunities to be established in the region to restore biodiversity (vegetation, mangroves and sea grass).	FCRC FCTE	2023-2026
7. Establish partnerships with local schools, TAFE and university colleges to promote the development of tourism skill development. A skilled workforce is required to service new visitor markets.	FCC	2023-2026

Experience Delivery

Aim: A vibrant and creative region delivering world class transformational products and experience.

ACTION	LEAD	TIMEFRAME
1. Work with Council to source grant funds for the Whale Heritage Interpretation Centre. Link this initiative with other marine education and research projects being undertaken by University of the Sunshine Coast and other global research centres.	FCTE FCRC State Government	2023-2028
2. Support the development of new products and experiences under the Marine Mecca initiative to position the region as a 365-day-a-year offering of marine activities from wreck and reef diving to bare boat and sailing charters, whale encounters and water sports, with a special focus on fishing post the government decision limiting net fishing of the Great Sandy Strait and the Mary River.	FCTE Operators	2023-2026
3. Align marketing with the Indigenous tourism strategy which is being prepared for K'gari, supporting new K'gari Indigenous product and mainland opportunities. Establish an Indigenous tourism working group with the support of Council and Traditional Owners.	FCTE TOs Indigenous leaders	2024-2026
4. Position the region as a leader in sustainable, accessible, cultural and responsible tourism products and services. Benchmark and certify the region and promote operator certification and recognition for their approach to accessibility and sustainability.	FCTE Operators	2024 onwards
5. Build skills and capacity across operators to present a high quality, visitor first approach to experience delivery.	FCTE, UniSC TAFE Schools	2023 onwards
6. Establish a sustainability pledge for the region recognising the connection to Country and the Indigenous stories linked to Country.	FCTE Indigenous leaders	
7. Undertake an audit of existing experiences to broaden and develop new and emerging experience and product categories to better service the needs and expectations of current target markets. Key product opportunities include health and wellness products including spas and health retreats, the promotion of local seafood and regional produce, pop up activation in visitor precincts and reserves (markets, arts craft and music).	FCTE FCRC Operators NPWS	2023-2026
8. Undertake an experience development program for key visitor precincts. This includes the Urangan Harbour and Marina precinct. Align to place making and Building Better Neighbourhoods initiatives which are underway.	FCTE FCRC Operators	

08 – Targets & Performance

Based on a balanced score-card approach for measuring the impact of tourism, the following indicators will be tracked, with 2023 setting a benchmark measure to monitor over the lifespan of the DMP.

Economic Results

Visitor expenditure ↑
Full time employment ↑
Seasonality ↓
Qld market share ↑

Social Results

Community satisfaction ↑
Education and training ↑

Environmental Results

Sustainable accreditation ↑
Biodiversity ↑
Energy, water, waste ↓

Activities & Processes

Impact of marketing strategies ↑
Quality assurance (Best of Qld) ↑

Relationships

Membership ↑
Membership satisfaction ↑
Engagement with external stakeholders +

Infrastructure and Resources

New investment ↑
Infrastructure development +
Planning processes +
Events +

09 – Roles & Responsibilities

	Market research	Investment in infrastructure	Experience development	Events	Advocacy	Marketing	Visitor information services	Capacity building
State Government agencies Investment and support for infrastructure to grow the tourism economy.		X						X
Tourism & Events Queensland Lead agency for tourism marketing in the State, promoting destination Queensland to a global market.	X		X	X		X		
Fraser Coast Tourism & Events One of the 13 Regional Tourism Organisations as recognised by Tourism & Events Queensland. FCTE's key priority areas are focused on driving visitation to the destination and working with operators and stakeholders to build and maintain a healthy and sustainable tourism economy.	X		X	X	X	X	X	
Fraser Coast Regional Council Infrastructure and event development support.		X		X				
Queensland Tourism Industry Council Voice of tourism. Advocacy and industry development.					X			X
Tourism Industry Associations Local and national tourism associations, with advocacy and industry partnership roles. e.g., QHA, AHA, AMPTO, etc.					X			
Tourism Operators and Private Sector Delivering destination experiences.		X		X		X		
Community Support a positive tourism experience and championing the local area as a great place to live, work and play.			X		X		X	

10 – Appendices

Appendix 1 Key Strategic Plans

Local Economic Roadmap

Fraser Coast Regional Council economic roadmap is the *Building Better Communities Beyond 2030* strategic document. This document outlines short-medium term strategies that promote long-term, sustainable growth beyond 2030.

In 2030 and beyond, the Fraser Coast will have a diversified economy with a dynamic and innovative business ecosystem. There will be strong skills and education pathways, unlocking lucrative and secure career opportunities for our young people.

Our communities will be inclusive and connected– united by a shared belief in our region’s natural beauty, as well as a self-belief in our ability to compete on the national and global stage.

Geographically, we will become even more connected to our neighbouring regions. These economic, education and social connections will continue to yield significant economic benefit for our community.



The vision highlights multiple goals within the region, including a diversified economy, stronger and clearer career paths, a connected and inclusive community and a collaborative region with our neighbours. Four primary pillars and their enabling strategies and initiatives are the key objectives to reach the vision.

The document acknowledges the role played by FCTE and the economic significance of tourism within the region. Continued collaboration between the Fraser Coast Regional Council, FCTE and local operators is critical for ongoing development and for the realisation of investment opportunities within the industry. Air services to the Fraser Coast and guided accessibility to K’gari are ongoing pressures on all stakeholders. The document highlights that a multifaceted approach is vital as additional accommodation, growing businesses and increasing population growth continue putting demand on accessibility around the region.

Economic Pillar	Long Term Objectives	Enabling Strategies
Education and Job Readiness	Improve education and training outcomes on the Fraser Coast through targeted programs, advocacy and partnerships with key groups.	✓ Enhanced school-to-work pathways to enhance job-readiness ✓ Nurture partnerships among Fraser Coast educators ✓ Increase local tertiary education options ✓ Place-based employment and training solutions
Business Investment	In partnership with Council, foster sustainable economic growth through investment attraction and facilitation efforts and targeted economic projects.	✓ Economic development priority projects delivered ✓ Deliver strategic investment attraction initiatives ✓ Foster economy-wide innovation ✓ Ensure local business support programs are available
Community Connections	Through marketing and development initiatives, strengthen connections across the community to build capacity and resilience among key groups and continue to forge strategic business relationships and enhance collaboration.	✓ Enhance the Fraser Coast's status as an inclusive community ✓ Foster regional confidence, connectedness and pride ✓ Promote local business, drive local outcomes ✓ Nurture local industry advocacy capabilities
Enabling Infrastructure	In partnership with Council and local groups, advocate for infrastructure investment from the Queensland and Australian governments that is critical to unlocking economic growth. Council to also invest in critical infrastructure where needed.	✓ Long-term infrastructure projects planned and delivered ✓ Major transport and tourism gateway projects planned and delivered to meet current and future needs ✓ Telecommunications meet business and community needs ✓ Key strategic planning frameworks delivered

Current State Tourism Strategic Plan

The current State strategic plan, *Towards Tourism 2032: Transforming Queensland's Visitor Economy to Welcome the World*, provides the vision for Queensland to become Australia's destination of choice for domestic and global visitors seeking the world's best experience by 2032. The mission is to encourage repeat visitation remaining 'cutting-edge relevant' – continuously reimagining and reinventing the State's offering for the benefit of visitors, communities, and the environment.

An ambitious industry target has been set across the State – \$34 billion in overnight visitor expenditure per annum by 2027 and \$44 billion by 2032. Ten identified areas of opportunities have been established to deliver the vision and increase visitor expenditure towards 2032. These actions are all relevant to the DMP and include:

1. Reimagine our coast beach and island offering
2. Enhance our appeal to families, couples, and students
3. Deliver tech-wonderment
4. Create more touring opportunities
5. Own tropical and marine adventure
6. Become a regenerative tourism leader
7. Refresh and develop our places to stay
8. Hero authentic culture, including via new venues
9. Visitor-first mindset
10. Enabled via sustainable funding

Three key strategic directions have been identified that lead initiatives, drive change, and establishes a framework and action plan that guides the State and subsequent RTOs a pathway to success:

- **Demand, Supply and Connectivity:** Drive visitor demand, deliver transformational visitor experiences and ensure connectivity to and within Queensland.
- **Catalysts for Change:** Re-define Queensland's visitor experiences and re-position the state as a global destination of choice in line with the Queensland brand.
- **Enablers for Change:** Support service delivery, meet and exceed visitor expectations, adapt to emerging consumer needs, and drive the overall success of Queensland's visitor economy.

The Fraser Coast is in prime position to contribute to all three strategic areas. Fraser Coast already has access to a world-heritage site position to hero eco-tourism and Indigenous leadership; a unique and naturally beautiful biodiversity with ownership over whale watching; and economic support and investment from the Fraser Coast Regional Council that allow reimagination and development to remain refreshed and relevant in lead up to the Brisbane 2032 Olympic and Paralympic Games.

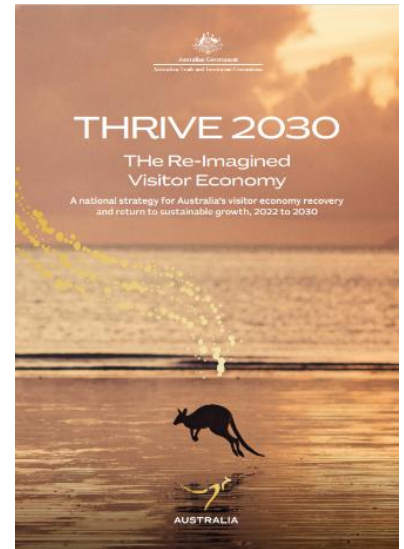


Current National Tourism Strategy

THRIVE 2030: The Re-Imagined Visitor Economy provides the national policy framework for tourism through to 2030. Broken into three phases; the Recovery Phase between 2022-2024 aims for visitor expenditure to reach pre-COVID-19 levels at \$166 billion, with \$70 billion of this from regional spend. By 2030, within the Accelerate Phase, the long-term goal is visitor expenditure to be worth \$230 billion, with \$100 billion regional spend.

Across the three key themes: collaborate, modernise and diversify, there are seven policy priorities to grow the visitor economy:

1. Deliver success through comprehensive collaboration
2. Improve data and insights
3. Grow a secure and resilient workforce
4. Embrace leading-edge business practices
5. Enhance visitor infrastructure
6. Build markets and attract visitors
7. Grow unique and high-quality products, including Aboriginal and Torres Strait Islander experiences



The outcomes include more effective and beneficial industry collaboration and improved research that will ultimately better support business decisions. The industry workforce will be upskilled to deliver high-quality experience that sustain high levels of visitor satisfaction with suitable infrastructure that meets the needs of visitors and communities. Diverse products and experiences will continually be delivered, allowing forecasted visitor levels and expenditure goals to be met.

The progression and outcomes of the Fraser Coast Destination Management Plan will align with the overarching goals outlined in *Thrive 2030*. The DMP aims to build and delivery high-quality experiences and products, industry connectivity and collaboration, with development pathways for the workforce to build up the visitor economy in a post-pandemic world.

Appendix 2 Data Behind the Recommended Targets

PRE-PANDEMIC				DURING AND POST PANDEMIC		
Holiday Visitors 3 Year Average (2017-2019)	3 Year Avg 2017-2019	Share of Fraser Coast Intrastate	Fraser Coast Share of Queensland Intrastate	3 Year Avg 2020-2022	Share of Fraser Coast Intrastate	Fraser Coast Share of Queensland Intrastate
Young SINKs/DINKs	Intrastate	10.0%	3.8%	Intrastate	4.0%	1.7%
Older SINKs/DINKs	Intrastate	21.9%	3.9%	Intrastate	25.8%	4.4%
Younger Family	Intrastate	11.3%	4.1%	Intrastate	7.0%	3.2%
Older Family	Intrastate	19.1%	3.8%	Intrastate	24.4%	4.5%
Empty Nesters	Intrastate	37.8%	6.2%	Intrastate	38.8%	6.2%
Total	Intrastate		4.5%	Intrastate		4.5%
Holiday Visitors 3 Year Average (2017-2019)	3 Year Avg 2017-2019	Share of Fraser Coast Interstate	Fraser Coast Share of Queensland Interstate	3 Year Avg 2020-2022	Share of Fraser Coast Interstate	Fraser Coast Share of Queensland Interstate
Young SINKs/DINKs	Interstate	1.4%	0.4%	Interstate	7.4%	2.0%
Older SINKs/DINKs	Interstate	19.6%	2.7%	Interstate	24.3%	2.6%
Younger Family	Interstate	2.7%	0.8%	Interstate	16.3%	5.8%
Older Family	Interstate	24.3%	3.6%	Interstate	17.8%	2.3%
Empty Nesters	Interstate	51.4%	5.8%	Interstate	34.2%	3.7%
Total	Interstate		3.4%	Interstate		3.0%

Fraser Coast – origin of visitor spend	
Holiday Expenditure 3 Year Average (2017-2019)	Share of Holiday Spend
Brisbane	22.5%
Regional QLD	36.1%
Sydney	7.1%
Regional NSW	16.6%
Melbourne	4.3%
Regional VIC	9.4%
South Australia	1.6%
Western Australia	0.6%
Tasmania	0.2%
Northern Territory	0.2%
ACT	1.5%

EarthCheck
earthcheck.org
Where are we? lights.begin.aura
info@earthcheck.org
+61 7 3924 4200