Contents

4 Message from the Mayor and Tourism Portfolio Councillor
6 Who We Are
8 The Value of Tourism
10 Tourism Economic Profile
12 Our Tourism Objective
13 Our Priority Markets
14 Our Tourism Pillars
15 Our Tourism Assets
16 Tourism Icons
18 Enablers of Great Tourism
20 Catalyst Projects
22 Sub-region Catalyst Projects
24 Cooloola Coast
26 Mary Valley Country
28 Gympie City
30 The West
32 Our Tourism Goals
39 Appendix 1 - Tourism Action Plan
46 Appendix 2 - Supporting Economic Snapshot
58 Sub-regional Performance and Audit of Tourism Product
MESSAGE FROM THE MAYOR

The Gympie Region Tourism Strategy provides clear direction on what is needed now and into the future to deliver a vibrant, dynamic and compelling visitor destination and a thriving, buoyant tourism industry generating even greater economic and social prosperity for the Gympie region.

This strategy delivers on Gympie Regional Council’s aspiration to be the “natural choice to live, work and play”. It is underpinned by the Gympie Regional Council Corporate Plan 2017-2022, the Gympie Region Tourism Discussion Paper 2018 and the Gympie Region Economic Development and Investment Strategy 2019 – 2024.

Whilst Gympie Regional Council is the custodian of the strategy, this is a “whole of region” plan, with success reliant on committed and effective collaboration between Council and sub-regional communities, tourism operators and dedicated volunteers that are equally willing to roll up their sleeves and work alongside us to deliver the key priorities and actions set out in this document.

External partnerships and collaborations with state and federal governments and their agencies, regional tourism offices and a broad range of strategic partners are also critical if, as a region, we are truly committed to developing our tourism industry.

Councillor Mick Curran
Mayor, Gympie Regional Council
MESSAGE FROM TOURISM PORTFOLIO COUNCILLOR

This strategy provides us with a broad and solid foundation for the promotion and experience of our region. Our region has spoken and we hope we have delivered a blueprint for the coming decade and beyond. Tourism and Economic Development cannot exist without each other and a strong focus into the future is needed to ensure our prosperity.

We have drawn from all corners of the region and all walks of life to deliver a vision of who we are and where we want to be. We have honed down to those areas where we shine and to where we aspire. We have put our region under the microscope, seen our strengths and considered our future prospects. This strategy provides the catalyst to ignite the ongoing aspirations of our communities visions and insights.

Our region is rich with assets and icons. With clever, collaborative future vision and action these will become must see and do tourist experiences. Our wide and varied attractions from the coast to the west, from the valley to the city and beyond allow us to profit from our treasures by providing an easily accessible, diverse, family friendly, cultural, culinary, historical and environmental experience for visitors now and into the future.

I am proud to have been a part of the development of this strategy. Part of our region’s bright future: Moving tourism from good to great!

Councillor Daryl Dodt
Tourism Portfolio Councillor
Gympie Regional Council
Horse Riding, Cooloola Coast
WHO WE ARE

There’s more to the Gympie region than you might imagine.

Our story is one of determination and creativity. We’re inspired by our stunning nature, driven by our pioneering spirit and focused on our future.

Amongst these fertile lands and unspoiled coastlines – family, friends, neighbours and community really mean something. We’re in tune with the world around us, proud of our heritage, and excited about what we offer anybody who chooses to live, work and play here.

Some call what we have “the simple life”. We just call it life. And the more time you spend getting to know us, the more you’ll understand why we wouldn’t trade it for anything else.

When you arrive in our part of the world, you’ll find the warmest of welcomes. We’re a generation with big ideas, and the kind of can do attitude that’ll turn them into reality – if you’re prepared to roll up your sleeves and get stuck in alongside us, we can do anything.

So take time to scratch the surface and uncover this extraordinary part of Queensland. A place where you can get back down to earth, free yourself from the things that don’t matter and focus on the things that do.

The Gympie region.
You’re Welcome
Gympie Region
The Value of Our Tourism

Tourism is everyone’s business!

From suppliers of accommodation and tourism experiences, restaurants, bars and cafes to various modes of transport, retail outlets, markets and all those businesses that offer goods and services to support the tourism industry – we all have an opportunity for financial gain if a visitor chooses the Gympie region for their holiday, short stay or day trip.

Tourism provides one of the best transformational opportunities to develop a region. It can be the catalyst for new and improved services and better infrastructure for its community. It not only creates jobs but can also deliver community, environmental and cultural benefits to a region.

Importantly, it is tourism, more than any other sector, that provides our customers with a window to the Gympie region.

It is a shopfront that provides a first impression of the region and plays a vital role in the visitors choice to stay longer and spend more in the Gympie region or to simply drive on and spend elsewhere.
Draft Tourism Strategy 2019-2024

Benefits: Economic  Social  Environmental  Cultural

SALES, EMPLOYMENT, WAGES, TAXES

TRAVELLERS

Air  RV  Motor Coach  Automobile

Meetings/Conventions  Fuel  Campground  Lodging  Sports Arena

Train

Cruise Lines

Entertainment  Food  Retail  Travel Agency  Museum

Events & Festivals  Bank  Farm  School  Markets

Outside Goods & Services  Local Goods & Services
GYMPIE REGION TOURISM ECONOMIC PROFILE

In 2018, the gross regional product (GRP) for the region was estimated at $2.17 billion with the local economy supporting 19,330 local jobs – with approximately 47 percent in full time employment.

With 499,000 overnight visitors and 600,000 day trippers in 2017* tourism in the Gympie region generated $147 million in overnight visitor expenditure for the economy and 11 per cent of total GRP.

90 per cent of visitors to the region are domestic, with the region’s abundant natural assets and diverse wildlife being key motivators of travel. The region also has untapped strengths in heritage tourism and in food and produce. The current average night spend for domestic visitors in the Gympie region is $108 per night and $68 for international visitors. This is predicated in a choice of low cost or no cost accommodation options including free camping, backpacking hostels and the homes of friends and relatives.

The region is primarily considered as a weekend getaway or a 3-day mini break.

Cooloola Coast accounts for 67 per cent of all leisure visitation to the region and visitors are unlikely to disperse.

* based on Australian Bureau of Statistics latest figures
## GYMPIE REGION
### OUR TOURISM OBJECTIVE

Moving tourism from good to great!

We will know that we are successful when we can demonstrate:

<table>
<thead>
<tr>
<th>More visitors</th>
<th>More domestic and international visitors are choosing to stay in the Gympie region.</th>
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<tbody>
<tr>
<td>Staying longer</td>
<td>Day-trippers are converted to overnight visitors and our domestic and international visitors are staying one extra night in the region.</td>
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<tr>
<td>Spending more</td>
<td>Our regional experiences, accommodation, restaurants and retail outlets are extracting greater financial value from visitors to the region.</td>
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<tr>
<td>And repeat</td>
<td>Positive reinforcement through word of mouth and online reviews leads to repeat visitation and greater sub-regional dispersal of visitors.</td>
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</table>
Domestic visitation accounts for 90 per cent of all visitors to the Gympie region, with international markets accounting for 10 per cent.

The region’s primary focus is the domestic market. However, growing its share of the international market will build a more resilient tourism region during the shoulder and off peak seasons. During these times, domestic visitors are less likely to travel and domestic occupancy rates are low.

The advent of the Bruce Highway upgrade, the possibility of fast rail and a new runway at Sunshine Coast Airport in 2020 present the Gympie region with an unprecedented suite of opportunities to grow its share of domestic and international visitation.

**OUR PRIORITY MARKETS**

**Domestic Market**
- **Primary:** Brisbane and Sunshine Coast
- **Secondary:** Toowoomba, Bundaberg, Gold Coast (within a 4-hour drive zone)

**International Market**
- **Primary:** United Kingdom and Europe
- **Secondary:** North America and Singapore
GYMPIE REGION
OUR TOURISM PILLARS

Nature
Wildlife
Heritage & Culture
Food & Produce

Events & Festivals

Gympie Music Muster
Goomeri Pumpkin Festival
Gold Rush Festival
# Gympie Region
## Our Tourism Assets

<table>
<thead>
<tr>
<th>Nature</th>
<th>• Carlo Sandblow • Rainbow Beach • Mary River and Tributaries • Great Beach Drive • National Parks • Coloured Sands • Cooloola Great Walk • Great Sandy Biosphere • Lake Borumba • Kimbombi Falls • RAMSAR Wetlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wildlife</td>
<td>• Platypus • Dolphins • Koala • Sea Turtles • Dingo • Dugong • Humpback Whales • Kangaroo • Echidnas • Rare and exotic bird species • Grey Nurse Sharks • Mary River “punk” turtle • Lungfish • Cod •</td>
</tr>
<tr>
<td>Heritage &amp; Culture</td>
<td>• Authentic Pioneering Gold and Timber Heritage • Mary Valley Rattler Steam Train • 30+ State Heritage Buildings (shops, hotels, banks, schools, galleries, museums, private homes, churches and civic buildings) • Art Gallery • Artisan Studio Trails • Performing Arts • Australian Institute of Country Music • Burgeoning Aboriginal Heritage and Cultural Experiences •</td>
</tr>
<tr>
<td>Food &amp; Produce</td>
<td>Over 1,000 agri-tourism businesses (producing macadamia nuts, limes, avocados, milk, beans, small crops, strawberries, beef, cheese, pork, ginger, garlic, rosella, grass fed eggs, jams, chutneys, seafood, juices and beverages including home grown coffee) • Food and Produce Farm Gates • Food Trails • Food Festivals • Fresh Food Markets •</td>
</tr>
<tr>
<td>Events &amp; Festivals</td>
<td>• Gympie Music Muster • Goomeri Pumpkin Festival • Heart of Gold Film Festival • Kilkivan Great Horse Ride • Gold Rush Festival • Mary Street Events • GourMay • Gympie Show and around 100+ smaller festivals (including the Gympie Faerie Festival, Great Gympie Duck Race, Mary River Festival •</td>
</tr>
</tbody>
</table>
GYMPIE REGION
TOURISM ICONS

1. Carlo Sandblow
2. Mary Valley Rattler
3. Barnacles Dolphin Centre
4. Great Beach Drive
5. Coloured Sands
6. Cooloola Great Walk
7. Gympie Region Trail Network
   • Gympie River to Rail Trail
   • Mary Valley Rail Trail
   • Kilkivan to Kingaroy Rail Trail
   • Bicentennial National Trail
8. Lake Borumba

Burgeoning Icons:
1. Farm Trails
2. Bird Watching
3. Culture (including Aboriginal)
ENABLERS OF GREAT TOURISM

To encourage an integrated and cohesive regional approach that will drive tourism from good towards great, the following enablers are required.

1. Commitment by government, business and the community to recognise tourism as an important driver of economic and social prosperity.

2. Tourism experiences are consistently upgraded or expanded in alignment with the region’s tourism pillars and in response to consumer demand.

3. An authentic and unique tourism offer can provide a platform to build and strengthen reputation and positively change perceptions.

4. Diverse tourism experiences that are consistent with a region’s pillars, assets and icons and deliver on consumer demand are sought after and welcomed.

5. Proactive in attracting public and/or private investment in tourism infrastructure and experiences through a balanced, consistent and collaborative regional approach.

6. Marketing a welcoming culture, great customer service and a quality tourism experience and infrastructure creates enduring positive perceptions of a region.

1. Acknowledged Importance
2. Dynamic Infrastructure
3. Unique Selling Proposition
4. Diverse Regional Experiences
5. More Investment
6. Foster Positive Perceptions

Kayaking Mary River, Gympie City
19
Draft Tourism Strategy 2019-2024
Dynamic Infrastructure
Unique Selling Proposition
Diverse Regional Experiences

Mountain Biking, Mary Valley Country

Dolphin Feeding, Cooloola Coast
GYMPIE REGION
CATALYST PROJECTS

The Gympie region’s catalyst projects are those that provide the best opportunities to activate real change in the region. They underpin the region’s strategic goals and connect to a series of priority actions outlined later in this document.

The following catalyst projects will stimulate tourism growth and spend in the region:

- Revitalise and Integrate Heritage Assets
  - ALL SUB-REGIONS

- All-inclusive Boutique Accommodation (and Wellness Facilities)
  - Mary Valley

- Multi-purpose Indoor Sports Facility
  - Gympie City

- Upgrade Existing Tourism Experiences*
  - ALL SUB-REGIONS

- Attract or Develop New Tourism Experiences
  - ALL SUB-REGIONS

- All-inclusive Business and Conference Hotel
  - Gympie City

- Build Wedding Market Capacity
  - ALL SUB-REGIONS

*For example, Barnacles Dolphin Centre, Gympie Gold Museum and Heritage Village, Gympie region land and water-based trail network. These catalyst projects are “whole of region” and not council exclusive projects.

Spanning each of these projects and all sub-regions, the following changes will also be required to stimulate tourism growth:

- **CULTURE CHANGE**: We are welcoming and open for business
- **PROCESS CHANGE**: We encourage and accelerate tourism
- **PERCEPTION CHANGE**: We can demonstrate noticeable change
Each sub-region of the wider Gympie region contributes something special to the overall regional tourism offer.

All sub-regions excel in at least one unique tourism position but also add depth and breadth to others. It is this combination of strength and diversity that provides the basis of tourism offer for the Gympie region.

Building on these strengths, the Gympie Region Tourism Strategy “provides a different or lead “position” for each of its four sub-regions and identifies a suite of catalyst projects that not only bring greater value to each sub-region but importantly adds more depth and diversity to the overall Gympie region tourism offer.

It is this diverse, but extremely compelling collection of experiences, borne of the region’s key tourism pillars that will assist Gympie Regional Council to achieve its vision of becoming “the natural choice to live, work and play”.

Tourism’s role in achieving this vision will be to contribute more visitors staying longer and spending more in the Gympie region and a regional community that enjoys greater social amenity and economic prosperity as a result.
1. COOLOOLA COAST

Gympie Region’s Contemporary Coastal Destination

Tourism Strategy

State-of-the art Bird Trail
- Convert day trippers to overnight visitors and extract greater value by developing a new experience with both mass market and niche appeal that, when combined with other nature experiences in the sub-region will encourage visitors to stay longer and spend more.
- Leverage the region’s RAMSAR* endorsed Wetland’s working with the appropriate associations to provide the necessary bird watching infrastructure (e.g. bird hides, interpretative signage, accessible trails) to enable Tin Can Bay to compete in the niche bird watching market. Target group business and education market.

Barnacles Dolphin Centre (BDC)
- Support BDC to improve existing facilities and the surrounding area to provide an even better customer experience.
- Target group business and education market and work with other nature products to extend stay through bundling and packaging.

Assets:
- Rainbow Beach
- Carlo Sandblow
- Coloured Sands
- Great Beach Drive
- Great Sandy Biosphere
- Great Sandy Marine Park
- RAMSAR Wetlands*

Experiences
- Dolphin feeding, kayaking
- Beach horse riding
- Cooloola Great Walk
- Diving with Grey Nurse Sharks
- Sea kayaking and surfing
- Strawberry picking and tasting
- Farmgate produce

Burgeoning
- Bird Watching
- Scenic Helicopter Rides
- Whale Watching
- Farm Trails

*a wetlands of international significance
Wedding Market

- Explore opportunities to increase small group visitation and length of stay through development of a competitive wedding proposition.
- Investigate the feasibility of a beach front ceremony venue.

Additional Benefit:

1. A burgeoning wedding market can stimulate the increased business for small cottage industries – e.g. florists, photography, caterers, reception venues, wedding hair and makeup artistry.
2. MARY VALLEY COUNTRY

Gympie Region’s Contemporary Country Destination

Tourism Strategy

Boutique Accommodation
- Explore the feasibility of locating an all-inclusive (dining/wellness facility) boutique accommodation option in Mary Valley to complement and add value to existing accommodation options and experiences in the region.
- Develop a Tourism Investment Prospectus and strong business case, inclusive of investment enablers, to assist with a proactive pitch for a boutique accommodation option.
- Provide small group accommodation options and expanded experience options for existing accommodation suppliers in the region.
- Proactively seek a boutique accommodation provider to develop an integrated accommodation, restaurant and wellness facility located in the Mary Valley.
- Target the small group market (business, leisure and weddings) by packaging small group accommodation options with expanded experience options for targeted groups.

Mary Valley Rail Trail
- Position Mary Valley as a cycling hub to create overnight stay and increased spend in the region.
- Target a higher yield demographic aligned to Australia’s growing interest in all forms of cycling.
- Capitalise on the Sunshine Coast’s national and international reputation as a burgeoning cycling destination by amplifying Mary Valley’s credentials in on-road cycling.
- Investigate the development of an Amamoor to Imbil stage of the Mary River Valley Trail to expand the region’s cycling offer to include forest cycling and mountain biking.

Assets:
- Mary River and tributaries
- Amamoor State Forest and Forest Reserve
- Imbil State Forest
- Lake Borumba

Experiences:
- Mary Valley Rattler
- Cycling and horse riding trails
- Kayaking and platypus discovery
- Mountain biking
- Food and produce
- Gympie Music Muster
- Self-guided canoe and kayak trails
- Significant land and water-based trail network

Burgeoning:
- Mary Valley Farm Trail
- Recreation Vehicle (RV) friendly towns, parking sites and amenities
- Wedding industry
### Additional Benefits:

1. In addition to adding new dining and wellness experiences to be leveraged by smaller accommodation, a boutique property enables Mary Valley to work in the small incentive and business markets and to add value to its wedding credentials.

2. A boutique accommodation property may also be leveraged by Mary Valley Rattler to encourage overnight stays in the region.

### Forest Triathlon Event

- Investigate the feasibility of developing a “Forest Triathlon” combining a run component (Gympie City to Amamoor), cycling (Amamoor to Imbil) on and a kayak component (Yabba Creek).

### Accessible Wildlife Experiences

- Improve visitors access to and interaction with the region’s iconic wildlife (e.g. platypus or the punk turtle) by improving the trail network, kayak launch sites.
- Seek a commercial tour operator to provide a guided experience on a daily basis.

### The Wedding Market

- Explore the opportunity to develop a regional approach to the wedding market by creating a cross-region wedding cluster (Mary Valley and Rainbow Beach suppliers) to leverage the work being undertaken to position the Sunshine Coast as a competitive wedding destination and in the lucrative national wedding market.

### Gympie Music Muster

- Work with stakeholder to raise the profile of the Gympie Music Muster in key markets and encourage greater lengths of stay in the region.

### Recreational Vehicles

- Encourage more Recreational Vehicles (RV’s) to visit the Mary Valley and increase visitor expenditure through encouraging prolonged stay (through new experiences) and spend in the region.
- Support the development of an information service that enhances the RV and visitor experience while visiting the Mary Valley.
3. GYMPIE CITY

Gympie Region’s Heritage and Culture Destination

Tourism Strategy

Heritage Position for Gympie City
- Strengthen Gympie City’s position as a tourism destination, by amplifying it’s credentials as South East Queensland’s premier heritage destination complementing our other sub-region’s positioning - coastal, country and equine.
- Support key stake holders to find ways in which Gympie City’s heritage buildings can be returned to their former glory with high quality and well-designed streetscapes that when integrated with each other, provide a suite of appealing and complementary heritage precincts that are easily accessed by the visitor.
- Work with key stakeholders to create four integrated heritage precincts that are easily accessed by the visitor and linked together by transportation services and high quality heritage themed amenities.

Mary Valley Rattler
- Work with the Mary Valley Rattler to encourage more group visitation in the conference and incentives market, packaging with other opportunities outlined in this document (e.g. conference accommodation and new experiences) to maximise stay and spend in the region.

Conference Hotel Accommodation
- Investigate the feasibility of an all inclusive accommodation, restaurant and conference facility located in Gympie City, enabling our region to compete in the small to medium group business conference, incentive, wedding and participatory sports markets.

Multi-Purpose Indoor Sports Facility
- Investigate the feasibility of a multi-purpose indoor sports facility to enable our region to compete for more group business particularly in the participatory sports market.
- Explore alignment of this facility with infrastructure required for a South East Queensland 2032 Olympic Bid.
Experience Attraction and Development

- Explore land use opportunities around the Mary River and/or tributaries or elsewhere in Gympie City.
- Develop an investment prospectus including a suite of investment enablers to proactively encourage new tourism experiences to set up business in Gympie City.

Additional Benefits:

1. Upgrading the Mary Street Shopping Precinct as a heritage precinct in its own right enhances the town’s ability to attract a new anchor tenant which in turn encourages more locals and visitors to shop here.

2. An all-inclusive business, conference and accommodation combined with a multi-purpose indoor sports facility enables the region to compete in the lucrative Business, Conference and Incentive market and to showcase the region’s sector strengths through hosting expositions and trade shows.

3. The region can leverage the marketing and distribution channels of a branded accommodation property reaching new audiences previously inaccessible to the region.
Kilkivan Bird Trail
- Encourage more day trippers (and eventually overnight visitors) to the sub-region and extract greater value by developing a state-of-the-art migratory bird experience that has both mass market and specialist tourism appeal.
- Develop the necessary bird watching infrastructure to provide this sub-region with a competitive and authentic natural tourism experience.
- Encourage (or establish) a specialist nature tour company to include the Kilkivan Bird Trail in its program and to package with the other tourism experiences in the region.

Queensland Education Market
- Develop an education program to encourage school group visitation to this part of our region, as part of Queensland school curriculum.
- Work with Cooloola Coast bird watching experts to develop specialist packages for the international education market.

Great Australian Rail Trail Concept
- Work with regional partners in South Burnett, Somerset and Ipswich to develop a new rail trail concept (Great Australian Rail Trail) encouraging more visitation to the region by leveraging the Kilkivan to Kingaroy of the journey stage.
- Consistently maintain and upgrade trail infrastructure, including interpretative signage.
- Explore the feasibility of glamping accommodation options to encourage longer stay and greater spend by higher yield visitors to our region.
Work with appropriate businesses to create a “cycling friendly tourism cluster”, including accommodation, complementary trail experiences and specialty retail options (e.g. – accessories, cycling wear etc.)

**Kilkivan Equestrian Centre**
- Raise awareness of the sub-region’s capacity in both equine circles and in the mainstream tourism market by exploring new or alternative uses for the Kilkivan Showground and Equestrian Centre.
- Explore the role and feasibility of glamping accommodation to encourage more visitors to stay longer and spend more as a complement existing accommodation in the sub-region.

**Goomeri Pumpkin Festival**
- Work with stakeholders to raise the profile of the Goomeri Pumpkin Festival in key markets and encourage greater length of stay in the region.

**Recreational Vehicles**
- Encourage recreational vehicles (RV’s) to visit Kilkivan and Goomeri and improve the visitor experience through supportive amenities and services (including visitor information services).

Additional Benefits:

1. Glamping accommodation can support a variety of different tourism initiatives in this sub-region by providing an attractive accommodation offer for both higher and lower yielding visitors particularly in the small group market (e.g. - cycling clubs, bird watching groups and Goomeri Pumpkin Festival attendees).
# GYMPIE REGION OUR TOURISM GOALS

Gympie region’s response to enablers of great tourism are set out in the following priority goals:

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<td><strong>1.</strong></td>
<td>Elevate Tourism as a Regional Priority</td>
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<td><strong>2.</strong></td>
<td>Build New and improve Existing Tourism and Infrastructure</td>
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<td><strong>3.</strong></td>
<td>Strengthen Gympie City’s Heritage Position and Assets</td>
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<td><strong>4.</strong></td>
<td>Develop New and Grow Existing Tourism Experiences</td>
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<td><strong>5.</strong></td>
<td>Proactive in Securing Greater Investment</td>
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<td><strong>6.</strong></td>
<td>Foster Positive Consumer Perceptions</td>
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### Elevate Tourism as a Regional Priority

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<tr>
<td>1.</td>
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<tr>
<td>1.1.</td>
<td>Elevate the importance of tourism within council’s planning and project processes and across our business and the community.</td>
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<tr>
<td>1.2.</td>
<td>Endorse the region’s seven catalyst tourism projects and facilitate and advocate for resources to deliver priority actions and tourism projects.</td>
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<tr>
<td>1.3.</td>
<td>Collaborate across our region to deliver economy of scale and stronger project outcomes.</td>
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<td>1.4.</td>
<td>Recognise that a balanced, consistent and collaborative approach to the delivery of key actions and catalyst projects will deliver stronger outcomes for our region.</td>
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<td>1.5.</td>
<td>Investigate new tourism revenue options.</td>
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*Mountain Biking, Mary Valley*
## Build New and Improve Existing Tourism Infrastructure

| 2.1. | Work with stakeholders to support the upgrade and ongoing maintenance of our existing tourism infrastructure including Barnacles Dolphin Centre, Gympie Gold Mine and Heritage Museum and the region’s land and water-based trails network. |
| 2.2. | Actively pursue public and/or private sector investment for catalyst infrastructure projects including boutique accommodation in the Mary Valley and an all inclusive Business and Conference Hotel in Gympie City. |
| 2.3. | Investigate ways in which the planning scheme can facilitate tourism focused development and improved development outcomes through the development assessment process in our region. |
| 2.4. | Undertake an audit of our region’s tourism signage and recommend ways in which the visitor experience might be improved through new or better signage. |
| 2.5. | Work with stakeholders to support Mary Valley to broaden the tourism experience in food, lifestyle and entertainment. |
| 2.6. | Engage our First Nation people in the planning and development of our cultural infrastructure |
| 2.7. | Consider public art opportunities at all entrances and exits to Gympie City, encouraging local artist input. |
| 3.1. | Embrace heritage as Gympie City’s unique position as a complement to the tourism position of our other sub-regions. |
| 3.2. | Respect and complement Gympie City’s heritage positioning in council’s planning and project processes. |
| 3.3. | Explore opportunities to create a tourism shopping precinct in Gympie City Centre that is sympathetic to the town’s heritage values. |
| 3.4. | Investigate the feasibility of an integrated transportation, design philosophy and marketing approach to our town’s four heritage precincts. |
| 3.5. | Explore opportunities to support and encourage residents located in identified tourism heritage precincts to retain or improve the character of their property aligned to the style of the precinct. |
| 3.6. | Investigate opportunities to re-purpose unappealing or unsightly industrial areas in our town through public art and creative design solutions, with input from local artists. |
| 3.7. | Support the enhancement of our existing tourism infrastructure with public art, sculpture and installations. |
| 3.8. | Investigate regulating billboard signage in all heritage precincts in addition to amendments to the Planning Scheme, the entrances and exits to Gympie City and in our other sub-regions. |
| 3.9. | Explore opportunities to acknowledge and celebrate Gympie City’s rich heritage through events, festivals and exhibitions. |
### Develop New and Grow Existing Tourism Experiences

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<tr>
<td>4.1</td>
<td>Examine the feasibility of creating new tourism experiences through smart product development and in alignment with consumer demand (working in the business).</td>
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<tr>
<td>4.2</td>
<td>Implement capacity building programs and training to support and enable the region’s existing tourism experiences to grow and add greater value to their products.</td>
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<tr>
<td>4.3</td>
<td>Collaborate with a united Regional Chambers of Commerce, on behalf of their sub-regions, to innovate and deliver quality experiences and customer service.</td>
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<tr>
<td>4.4</td>
<td>Investigate opportunities to develop new business models to optimise growth potential of our existing tourism assets.</td>
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<tr>
<td>4.5</td>
<td>Encourage and facilitate the ethos of “your welcome’ in our regional culture and approach.</td>
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<tr>
<td>4.6</td>
<td>Investigate the feasibility of packaging our region for film, television and advertising opportunities.</td>
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<tr>
<td>4.7</td>
<td>Plan to attract more participatory sports events to the region aligned with our current sporting facilities and accommodation capacity.</td>
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# 5. Proactive in Securing Greater Investment

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<td>5.1.</td>
<td>Develop a portfolio of our region’s catalyst investment-ready projects and opportunities, including existing infrastructure requiring upgrade.</td>
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<tr>
<td>5.2.</td>
<td>Develop a tourism toolkit to inform council’s planning and project processes.</td>
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<tr>
<td>5.3.</td>
<td>Proactively seek public and/or private sector investment for our catalyst projects.</td>
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<tr>
<td>5.4.</td>
<td>Develop an investment prospectus, featuring a suite of investment enablers.</td>
</tr>
<tr>
<td>5.5.</td>
<td>Collaborate with a united Regional Chambers of Commerce (and their respective tourism industries) to advocate for funding support at state and federal level.</td>
</tr>
</tbody>
</table>
### 6. Foster Positive Consumer Perceptions

| 6.1. | Plan and implement a Gympie Region Marketing Campaign to increase positive perceptions of our region in target markets. |
| 6.2. | Collaborate with a united Gympie Region Chambers of Commerce to ensure that our brand story is embedded within each sub-region, business and in the local community. |
| 6.3. | Amplify our sub-regional strengths and positioning in targeted marketing initiatives. |
| 6.4. | Develop a regional tourism toolkit (with a suite of regional marketing assets and tools) for use by the wider tourism industry (and other sectors) in marketing our region. |
| 6.5. | Develop a family of regional tourism brochures (and other collateral) with a distinct Gympie region look, tone, feel and messaging. |
| 6.6. | Develop a television and screen location directory for use by national and international screen production companies. |
| 6.7. | Leverage greater opportunities and outcomes for our region by developing strong partnerships with Regional Tourism Organisation’s and other key stakeholders, for example Sunshine Coast Airport. |
The recommendations in this plan expand on the six regional goals outlined earlier in the document and reflect the wealth of opportunities available to our region to move tourism from good to great.

Some actions may be readily implemented, others will require a more considered approach and others again will require extensive planning but require strategic support now to set up the building blocks for the future.

The spirit and intent behind each of the actions is one of regional collaboration and support, working together towards our regions common goals.

In completing the actions outlined in this plan, our most important principal is that this is a strategy for the entire region and one that cannot be achieved by council alone.

To be fully realised, this is a strategy that will require a “kind of can do attitude that’ll turn big ideas into reality.”

The following Action Plan organises the recommendations of this report into high, medium and low priorities.

- High = 0 - 2 years
- Medium = 2-7 years
- Low = 7 + years
## 1. Elevate Tourism as a Regional Priority

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Goal Addressed</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recognise <strong>tourism as a significant driver of economic and social prosperity</strong> in our region’s Planning Scheme and Operational Plan, as a component of our Gympie Region Economic Development and Investment Strategy.</td>
<td>1.1</td>
<td>High</td>
</tr>
<tr>
<td><strong>Elevate the importance of tourism</strong> within council’s planning and project processes. Consider tourism outcomes that align to this strategy in new council projects and agree to expand the scope of existing projects, where a catalyst tourism project might also be progressed by doing so.</td>
<td>1.1</td>
<td>High</td>
</tr>
<tr>
<td><strong>Endorse the strategy’s seven catalyst tourism projects</strong>, as projects that stimulate the most immediate economic impact for our region and as such consider affording these projects greater attention in council’s planning and project processes.</td>
<td>1.1</td>
<td>High</td>
</tr>
<tr>
<td>Consider an <strong>increase to Destination Gympie Region’s funding</strong> to enable greater competitiveness in destination marketing and in tourism development projects aligned to this strategy.</td>
<td>1.2</td>
<td>High</td>
</tr>
<tr>
<td>Encourage a welcoming “<strong>how can we help you</strong>” service culture within Gympie Regional Council, inspiring staff to go the extra mile to deliver great customer service. Work with a united Chambers of Commerce Group to embed a welcoming customer service culture in to their tourism businesses.</td>
<td>1.3</td>
<td>High</td>
</tr>
<tr>
<td>Support a <strong>united and collaborative regional approach</strong> encouraging regional stakeholders to work together to achieve stronger experience and infrastructure attraction, investment and marketing outcomes for our region in alignment with this strategy.</td>
<td>1.3 1.4</td>
<td>High</td>
</tr>
<tr>
<td>Investigate regional approaches and case studies on the collection of tourism income and revenue and develop recommendations for the Gympie region.</td>
<td>1.5</td>
<td>Medium</td>
</tr>
</tbody>
</table>
## 2. Build New and Improve Existing Tourism Infrastructure

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Goal Addressed</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Support existing owners, developers and investors to build, upgrade or refurbish privately owned tourism infrastructure, dwellings and experiences by developing a suite of compelling investment enablers to stimulate positive private sector action.</strong></td>
<td>2.1 High</td>
<td></td>
</tr>
<tr>
<td>Support proactivity in securing greater tourism investment into our region, aligned with the catalyst tourism projects, by developing a suite of investment enablers to assist the region in becoming more competitive in its investment pitches for new or improved infrastructure.</td>
<td>2.2 High</td>
<td></td>
</tr>
<tr>
<td>Investigate ways in which the planning scheme can facilitate tourism focused development and improve development outcomes through the development assessment process.</td>
<td>2.3 High</td>
<td></td>
</tr>
<tr>
<td>Undertake an audit and analysis of tourism signage gaps and variances (including entry signage, tourism, directional and interpretative signage) across our region, working with all tiers of government to address those requirements that improve the visitor experience in the Gympie region.</td>
<td>2.4 High</td>
<td></td>
</tr>
<tr>
<td>Encourage collaboration with Mary Valley (and our other sub-regions) to broaden and improve the tourism offer in food, lifestyle and entertainment in alignment with the catalyst projects and key actions outlined in this document.</td>
<td>2.5 High</td>
<td></td>
</tr>
<tr>
<td>Support the engagement of the region’s First Nation People in the planning and development of our tourism infrastructure, including the upgrade of “Welcome to Gympie Region Signage” incorporating the language of the region’s First Nation People at relevant entrances and egresses to the region.</td>
<td>2.6 High</td>
<td></td>
</tr>
<tr>
<td>Support and amplify our region’s burgeoning artisan community and credentials by considering public art opportunities at all entrances and egresses to the Gympie region in targeted tourism experiences and in appropriate public places.</td>
<td>2.7 Medium</td>
<td></td>
</tr>
</tbody>
</table>
### 3. Strengthen Gympie City’s Heritage Position and Assets

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Goal Addressed</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree to Gympie City’s unique tourism position as becoming <strong>Queensland’s premier heritage tourism destination</strong> drawing on the township’s unique heritage attributes and strengths, as a complement to our other sub-regional positions of coastal, country and equine.</td>
<td>3.1</td>
<td>High</td>
</tr>
<tr>
<td>Support that council’s planning and business processes are to be underpinned by heritage considerations and encourage officers to take a sympathetic approach to incorporating heritage into existing Master Planning and in projects specific to Gympie City.</td>
<td>3.2</td>
<td>High</td>
</tr>
<tr>
<td>Support <strong>the development of a dynamic heritage shopping precinct and tourism destination</strong> in Mary Street. Consider utilising the upper Mary Street Master Plan project to create a suite of heritage values and bench marks and a style guide that will create a consistent and recognisable “heritage look” for the town’s future heritage upgrades and developments.</td>
<td>3.3</td>
<td>Medium</td>
</tr>
<tr>
<td>Investigate the feasibility of connecting the town’s four heritage precincts and Recreational Vehicle sites through an integrated transportation service (e.g. a hop-on-hop-off bus) enabling the visitor to easily access all four precincts. Consider consistent heritage theming and social amenity for each of the precincts and recommend other ways to improve the visitor experience, for example through professional curation of exhibits. This action requires close collaboration to work with key stakeholders to investigate.</td>
<td>3.4</td>
<td>High</td>
</tr>
<tr>
<td>Develop a suite of compelling investment enablers to motivate and support existing owners, developers and investors located within identified heritage precincts to build, upgrade or refurbish privately owned heritage tourism infrastructure, dwellings and experiences in Gympie City and investigate heritage grant funding.</td>
<td>3.5</td>
<td>Medium</td>
</tr>
<tr>
<td>Undertake an audit of the town’s visible but unattractive or industrial sites and prepare a report to demonstrate how they might be repurposed or cleverly disguised through use of public art and creative design solutions that amplify the region’s artisan credentials.</td>
<td>3.6</td>
<td>High</td>
</tr>
<tr>
<td>Explore opportunities to enhance existing tourism infrastructure, for example the River to Rail Trail, Heritage Trails or in Recreational Vehicle Sites, with public art, sculpture and installations from local artists.</td>
<td>3.7</td>
<td>Medium</td>
</tr>
<tr>
<td>Agree to regulate billboard signage in heritage precincts and in all entrances to and egresses from Gympie City to improve the visitors first impression of the town. Consider similar regulation in our sub-regions.</td>
<td>3.8</td>
<td>High</td>
</tr>
<tr>
<td>Support and attract events, festivals and exhibitions that acknowledge and celebrate Gympie City’s rich heritage (e.g. Gympie Gold Rush Festival).</td>
<td>3.9</td>
<td>High</td>
</tr>
</tbody>
</table>
## 4. Develop New and Grow Existing Experiences

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Goal Addressed</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepare a <strong>Tourism Experience Attraction Plan</strong> outlining gaps in the region’s tourism offering and identifying the most appropriate new tourism experiences to attract to our region. This should be undertaken in alignment with the region’s tourism pillars, working in collaboration with key stakeholders and based on consumer demand.</td>
<td>4.1</td>
<td>Medium</td>
</tr>
<tr>
<td>Implement a range of capacity building programs to provide the region’s existing tourism industry with the skills and capacity to grow and add greater value to their products or develop new business models that secure their longevity. Investigate ways in which council might consider accelerating new developments (e.g. – material change of use applications) through its planning and development processes. Encourage a philosophy of continuous improvement in the ongoing growth and development of our region’s tourism experiences so that they are competitive into the future.</td>
<td>4.2 4.4</td>
<td>High</td>
</tr>
<tr>
<td>Agree to <strong>closer collaboration with a united Regional Chamber of Commerce Group</strong> (representative of each sub-regional Chamber) committed to and focused on delivering quality tourism experiences and customer service and a balanced, consistent approach to regional investment attraction, product development and regional marketing.</td>
<td>4.3</td>
<td>High</td>
</tr>
<tr>
<td>Encourage to deliver a welcoming <strong>“how can we help you” service culture</strong> within Gympie Regional Council, inspiring staff to go the extra mile to deliver great customer service. Work with a united Chambers of Commerce Group to embed a welcoming customer service culture in to their tourism businesses.</td>
<td>4.5</td>
<td>High</td>
</tr>
<tr>
<td>Prepare a <strong>Film and Television Location Plan and Prospectus</strong> to promote the Gympie region as a potential film and television location. Match our region’s nature, landscapes and heritage assets with future film and television production themes. Work with Screen Queensland to develop new networks and channels to market. Consider investment enablers to provide our region with a competitive advantage over other destinations vying for similar opportunities.</td>
<td>4.6</td>
<td>Medium</td>
</tr>
</tbody>
</table>
## 5. Proactive in Securing Greater Investment

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Goal Addressed</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support a <strong>united, single minded focus</strong> to deliver our region’s seven catalyst tourism projects. Source State and Federal Government funding to undertake projects, working with a united Gympie Region Chambers of Commerce Group to encourage sub-regional advocacy for and commitment to the delivery of these projects.</td>
<td>5.1</td>
<td>High</td>
</tr>
<tr>
<td>Develop an “<strong>investment ready toolkit</strong>” to assist the region’s tourism industry to undertake consistent, professional, high quality investment pitches on behalf of themselves and our region. Work with Trade and Investment Queensland and Austrade to ensure that our region is “pitch ready” through delivery of capacity building programs.</td>
<td>5.2</td>
<td>High</td>
</tr>
<tr>
<td>Support a proactive regional approach to securing greater tourism investment into our region by <strong>developing a suite of compelling investment enablers to assist the region in becoming more competitive</strong> in its investment pitches and more proactive in sourcing new leads.</td>
<td>5.3</td>
<td>High</td>
</tr>
<tr>
<td>Prepare a <strong>Regional Tourism Investment Prospectus</strong> to showcase our region’s catalyst tourism projects, developing compelling business cases in support of each catalyst project and matching them to targeted investors. Work with Trade and Investment Queensland and Austrade to identify appropriate opportunities to pitch for investment including participation in inward and/or outbound trade missions.</td>
<td>5.4</td>
<td>High</td>
</tr>
</tbody>
</table>
## 6. Foster Positive Consumer Perceptions

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Goal Addressed</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop <strong>integrated marketing campaigns</strong> that disrupt old consumer perceptions and replace them with new, positive perceptions that motivate greater visitation to our region. Agree that the Gympie Region Brand Story is the cornerstone of council’s external tourism and marketing initiatives and communications.</td>
<td>6.1 6.2</td>
<td>High</td>
</tr>
<tr>
<td>Agree to <strong>closer collaboration with a united regional Chamber of Commerce Group</strong> (representative of each sub-regional Chamber) to encourage sub-regional commitment to and support of regional marketing campaigns, tourism collateral production, industry development and familiarisation programs and other initiatives whereby a regional approach provides a stronger platform.</td>
<td>6.3</td>
<td>High</td>
</tr>
<tr>
<td>Undertake an audit of council’s tourism brochures and <strong>create a positive and consistent Gympie region look, feel, tone and manner</strong> to ensure that the delivery of our region’s tourism collateral is instantly recognisable as Gympie region.</td>
<td>6.4 6.6</td>
<td>High</td>
</tr>
<tr>
<td>Develop a <strong>“tourism toolkit”</strong> (including a suite of regional tools and marketing assets) to support the tourism industry to leverage regional marketing campaigns by producing more effective, consistent and impactful marketing collateral that is instantly recognisable as distinctively Gympie region.</td>
<td>6.5</td>
<td>Medium</td>
</tr>
<tr>
<td>Prepare a <strong>Film and Television Location Directory and Prospectus</strong> to promote the Gympie region as a potential film and television location. Match our region’s nature, landscapes and heritage assets with future film and television production themes working with Screen Queensland to develop new networks and channels to market. Consider investment enablers to provide our region with a competitive advantage over other destinations vying for the same opportunity.</td>
<td>6.7</td>
<td>Medium</td>
</tr>
<tr>
<td>Support the <strong>preparation and funding of a Memorandum of Understanding</strong> approach with appropriate regional tourism organisations and other stakeholders, whereby collaboration assists our region to achieve the outcomes outlined in this document or provided real opportunities to leverage for example, by working with Sunshine Coast Airport we will be able to reach new markets previously unattainable to us.</td>
<td>6.8</td>
<td>High</td>
</tr>
</tbody>
</table>
APPENDIX 2 – SUPPORTING ECONOMIC SNAPSHOT

(RESEARCH EXCERPTS FROM 2018 TOURISM DISCUSSION PAPER)

About the Destination

Gympie region’s economic profile

The history of the Gympie regional economy shown in Figure 1, shows solid and consistent growth from 2003 to 2008, until the Global Financial Crisis (GFC) in late 2008. By the end of 2009, economic growth had slowed significantly and in 2010 the Gympie economy shrank slightly. For the next five years through to 2015, the economy remained essentially unchanged. Over the last two years however, there have been signs of growth returning. In June 2017, the gross regional product for Gympie was estimated at $2.09 billion with the local economy supporting 18,400 local jobs.

Figure: Gross Regional Product, Gympie Regional Council LGA. Source: NIEIR, economy.id.
The comparison with the overall Queensland result in Figure 2 overleaf, shows the gap in economic growth that developed between Gympie region and Queensland in the six years after the GFC. During this time, the Gympie region economy remained essentially unchanged while Queensland continued to grow marginally. It also highlights that since that stagnant period, Gympie region’s economic growth over the last two years has been greater than that of Queensland.

Figure: Cumulative Change in Gross Regional Product, Gympie LGA vs Queensland. Source: NIEIR, economy.id.
There was no data available to compare the economic impact and performance of specific industries within the Gympie region economy, however employment and value add (economic inputs) by industry has been used below as a proxy.

Within this proxy, the ‘Accommodation and Food Services’ category has been used to reference the tourism industry by comparison, however it should be noted that this category includes both tourist and local consumption, as well as excluding several associated areas such as attractions and transport by tourists.

Over the five years from FY12 to FY17, there was growth in employment in areas such as ‘Construction’ and ‘Mining’, however several industries saw a decline in employment. The largest decline was in the ‘Agriculture, Forestry and Fishing’ category, however the second largest fall was in ‘Accommodation and Food Services’ as shown in Figure 3.
Similarly, over the last five years, there was substantive change in the value add within several industries in the Gympie region. Figure 4 below shows the strong growth in the ‘Mining’ and ‘Construction’ industries value-add, while several industries such as ‘Agriculture, Forestry and Fishing’ and ‘Accommodation and Food Services’ declined.

![Figure: Value added by industry sector, Gympie Regional Council LGA. Source: NIEIR, economy.id.](image)

Based on the above data, it would be reasonable to assume that over the five years from 2012 to 2017, during a period with three years of stable economy followed by two years of strong growth, several industries within the overall Gympie region economy have declined.

The largest of these was ‘Agriculture, Forestry and Fishing’ which declined the largest industry by value add with 15.9 per cent, to equal second with 12.7 per cent, over the five years.

Similarly, the ‘Accommodation and Food Services’ category declined from 3.6 per cent to 2.6 per cent over the same period. These two categories are significant in that they also represent large employment opportunities within the region, particularly among youth. Over the last five years, the two categories combined have seen the loss of more than 700 jobs in the region.
Tourism economic profile

Gympie Region Tourism Industry audit and regional comparisons

Of the 4401 businesses within the Gympie region, tourism accounts for 499 businesses or just over 11 per cent of all businesses in the region\textsuperscript{51}. In 2016/17 it is estimated that the sector employs around 1078 people.

By comparison, Noosa has just over 1000 tourism businesses\textsuperscript{52} and Fraser Coast has 861 tourism businesses. Both regions have a greater reliance on tourism as a key pillar of their respective economies than the Gympie region.

Of the 499 tourism businesses in Gympie region, only 26 (or five per cent) employ more than 20 people. Seventy-two percent of all tourism businesses in the region employ less than five people and of that number, 195 businesses (or 30 per cent of all tourism businesses) do not employ at all.

<table>
<thead>
<tr>
<th></th>
<th>Gympie</th>
<th>Noosa</th>
<th>Sunshine Coast</th>
<th>Fraser Coast</th>
<th>Toowoomba</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>499</td>
<td>1048</td>
<td>3896</td>
<td>861</td>
<td>1612</td>
</tr>
<tr>
<td>None</td>
<td>195</td>
<td>421</td>
<td>1593</td>
<td>319</td>
<td>679</td>
</tr>
<tr>
<td>1-4</td>
<td>165</td>
<td>352</td>
<td>1285</td>
<td>305</td>
<td>453</td>
</tr>
<tr>
<td>5-19</td>
<td>113</td>
<td>219</td>
<td>841</td>
<td>206</td>
<td>378</td>
</tr>
<tr>
<td>20+</td>
<td>26</td>
<td>61</td>
<td>176</td>
<td>37</td>
<td>97</td>
</tr>
</tbody>
</table>

\textsuperscript{51} Tourism Research Australia, Local Government Area Profile 2016/Gympie Region.

\textsuperscript{52}TRA Definition – Any business that relies significantly on tourists including direct and indirect consumption of the main product or service. Tourism Businesses in Australia 2010–2012, Appendix A.
The Gympie regional tourism workforce

Of the 1078 people employed in the tourism industry\textsuperscript{53} within the Gympie region, 43 per cent are in full time employment.\textsuperscript{54} Female employees make up 65 per cent of the workforce, with more than 88 per cent of all employees being in the 15-44 age range.

The largest proportion of the region’s tourism workforce is in the 25-44 age group (40 per cent of the total workforce or 307 employees). This is followed by the 15-24 age range (32 per cent of the total workforce or 244 employees) and the 55-64 group which accounts for 211 employees (or 28 per cent of the total workforce).

<table>
<thead>
<tr>
<th></th>
<th>Gympie</th>
<th>Sunshine Coast</th>
<th>Fraser Coast</th>
<th>Toowoomba</th>
</tr>
</thead>
<tbody>
<tr>
<td>No qualifications</td>
<td>66%</td>
<td>57%</td>
<td>57%</td>
<td>60%</td>
</tr>
<tr>
<td>Certificate</td>
<td>28%</td>
<td>26%</td>
<td>26%</td>
<td>23%</td>
</tr>
<tr>
<td>Degree</td>
<td>6%</td>
<td>8%</td>
<td>5%</td>
<td>8%</td>
</tr>
</tbody>
</table>

The Gympie region’s results are consistent with a general trend in the tourism industry that suggests that tourism (and in particular hospitality) is not considered as a true career due to long and unsociable working hours, poor pay and conditions (when compared to other industries) and the perceived lack of a career path.

\textsuperscript{53}Difference in employment numbers reflects different research sources.
\textsuperscript{54}Economy ID/Gympie Tourism and Hospitality Workforce Characteristics 2011 – note 2016 Census data has not yet been released and figures for Sunshine Coast Region also included Noosa Shire Council as part of an amalgamated Sunshine Coast Regional Council.

Draft Tourism Strategy 2019-2024
Tourism sector comparison with other high growth sectors

In terms of employment by industry sector, tourism, denoted by accommodation and food services, does not rank within the top five sectors of the Gympie region economy contributing only six per cent to Gympie Region’s Gross Regional Product (GRP). Tourism ranks eighth out of 12 sectors for GRP and sixth out of seven sectors for employment and at 6.4 per cent of the region’s tourism workforce, Gympie region is sitting behind the Queensland average for tourism employment at 7.4 per cent.

Health Care and Social Assistance lead the region’s sectors in both GRP (11.7 per cent) and employment by industry sector (12.6 per cent). Retail, Education and Training, Manufacturing and Agriculture, Forestry and Fishing are also in the top five sectors for both GRP and employment in Gympie region.

As noted earlier however, unlike some sectors, the overall tourism industry is growing. In 2011, overall Tourism represented 3.6 per cent of the Gympie region economy, increasing to six per cent of the economy in 2016.

<table>
<thead>
<tr>
<th>Sector</th>
<th>Employees</th>
<th>Per Cent GRC Workforce</th>
<th>Per Cent QLD Comparative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Care and Social Assistance</td>
<td>1983</td>
<td>12.6%</td>
<td>13%</td>
</tr>
<tr>
<td>Retail</td>
<td>1919</td>
<td>12.2%</td>
<td>9.9%</td>
</tr>
<tr>
<td>Education and Training</td>
<td>1602</td>
<td>10.2%</td>
<td>9%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>1464</td>
<td>9.3%</td>
<td>6%</td>
</tr>
<tr>
<td>Agriculture, Forestry, Fishing</td>
<td>1455</td>
<td>9.3%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Accommodation, Food Services</td>
<td>1004</td>
<td>6.4%</td>
<td>7.4%</td>
</tr>
<tr>
<td>Public Administration</td>
<td>831</td>
<td>5.6%</td>
<td>6.5%</td>
</tr>
</tbody>
</table>

Table: Per Cent Employed by Industry Sector Gympie Region v Queensland
Source: NIEIR, economy.id
Tourism industry economic profile

In 2017, there were a total of 499,000 overnight visitors to the Gympie region. Domestic visitors accounted for 90 per cent (or 457,000) of all overnight visitors to the region, while international visitors accounted for 10 per cent of all visitors or 52,000 international visitors.

The region’s room stock accounts for almost 5,000 beds and the region’s occupancy rates (based on Gympie and Cooloola Coast bed spaces only) perform more strongly in the shoulder and off peak months, compared to other sub-regions in the Sunshine Coast, than they do in the traditional January domestic holiday period.
Domestic visitors

In 2017, the Gympie region attracted 457,000 domestic overnight visitors. This was an increase of approximately 10 per cent on the year prior and 39 per cent higher than 10 years ago.

By comparison, the Queensland state result showed 2017 had a three per cent increase on the year prior and only a 20 per cent increase over the last 10 years. This resulted in Gympie region maintaining its share of the total overnight domestic visitors in Queensland over the same period.

The comparison with the Sunshine Coast in the graph above, highlights the consistent strength of the growth in Gympie tourism, however the detail of the two destinations is quite diverse.

Those travelling in the Gympie region for holiday purposes were the largest proportion of visitors by purpose, with a 10-year average share of 58 per cent of all domestic visitors. In fact, the share of all four categories of visitor purpose to the region has remained stable over the last 10 years.

Domestic holiday visitors\textsuperscript{58}

The number of Holiday visitors to the Gympie region also exceeded the rate of growth for the state with eight per cent growth in 2017 and a 36 per cent increase over the last 10 years compared to three per cent and five per cent for Queensland respectively. Domestic Holiday visitor nights have grown by 51 per cent over the last 10 years.

The Cooloola Coast sub-region dominated the region’s total domestic holiday visitors with an average 61 per cent share of overnight domestic visitors over the last 10 years. In 2017, Cooloola Coast still enjoyed a 66 per cent share of all visitors.

This increase came at the expense of the Gympie City sub-region which had a 26 per cent share of holiday visitors in 2008, however by 2017 this had declined to less than 20 per cent.

Beyond Cooloola Coast, Brisbane residents were drawn to Gympie City, including Mary Valley Country (16 per cent) while Sunshine Coast residents were more likely to stay outside the city (25 per cent). The Gympie Central and Kilkivan share has been included, however due to the small number of visitors and the sample size, these results should be considered indicative only. Figures for the region’s northern districts were not available.

\textsuperscript{58}Holiday or leisure visitors are those that have higher propensity to stay overnight and spend on both accommodation and experiences. Other sectors include Visiting Friends and Relatives (spend on experiences but not accommodation and Business (those who visit the region through work commitments but are unlikely to spend on experiences).
Visitor source markets

In the last two years, Brisbane has returned to its position as the Gympie region’s dominant source market for domestic holiday visitors. In 2015, Brisbane, the region’s primary source market was almost eclipsed by a much closer source market – the Sunshine Coast.

Recently, the source markets for the Gympie region have contracted to the point where Brisbane and the Sunshine Coast now account for almost 70 per cent of all domestic holiday visitors in 2017. The growth and high share of Sunshine Coast visitors suggests that there are further intraregional opportunities for Gympie region to explore.

The strength of the Sunshine Coasts visitation to the Gympie region can also be seen in day trippers to the region. More than 60 per cent of day trippers are Sunshine Coast residents with Brisbane a secondary market on 24 per cent. Day tripper visitation to the region accounts for 696,000 visits.

While this presents a strong opportunity for the region to convert day trippers to overnight visitation, the day tripper still contributes $74 million\(^{(59)}\) to the regional economy (much more than the international market at $14 million) and its economic impact on the region’s experiences, cafes and retail should not be underestimated.

Domestic visitor nights

In 2017 the Gympie region generated 1.2 million visitor nights, less than half that of the Noosa Shire at three million visitor nights, and Sunshine Coast at seven million visitor nights. Both Gympie region and the Sunshine Coast region generated an average length of stay of three nights, whilst Noosa and Fraser Coast achieved an average length of stay of four nights.

More than 77 per cent of visitor nights in the Gympie region were spent in low yield or no yield accommodation\(^{(60)}\). Visiting family and relatives (VFR) accounted for 50 per cent of all visitor nights in the region with a further 27 per cent of visitor nights in camping or caravan grounds.

While the VFR market does not contribute significantly to the accommodation sector, it should be noted that like the day tripper, the VFR sector’s economic contribution to the region through spend on experiences, food and beverage and on retail, should not be underestimated.

Only 14 per cent of all visitor nights in the Gympie region were spent in commercial accommodation, compared with 56 per cent in Noosa, 33 per cent in the Sunshine Coast and 30 per cent in Fraser Coast.

Average domestic per night spend

A lower length of stay combined with a cheaper style of accommodation led to an average per night spend of $108 in the Gympie region, compared to $200 in Noosa, $175 in Sunshine Coast and $118 per night in Fraser Coast.

More than 67 per cent of domestic holiday

\(^{(59)}\)Local Government Area Profile 2016/Gympie Region.

\(^{(60)}\)Tourism Research Australia - Local Government Area Profiles 2016/Gympie Region.
visitors to the region stay three nights or less on their visit. This is in line with the fact that 89 per cent of all overnight visitors to the Gympie region come from Queensland. Queenslanders are unique in that they overwhelmingly holiday in multiple short bursts throughout the year – typically 3-4 days each time.

Within a short to medium term strategy therefore, the Gympie region can be defined as a "weekend getaway" destination. Please see visitor profile section (page 68) for more information on the motivations and style of holiday sought from a "weekend getaway" visitor.

Longer term, the region should aspire to extending the weekend getaway to a short break stay of between four to six nights.

**International visitors**

Between 2010 to 2013, there was a decline in international visitors to the region however, this was reversed from 2014 as a result of new international positioning for the region as part of "Australia’s Nature Coast".\(^{61}\)

**International visitor numbers**

Since the introduction of the ‘Australia’s Nature Coast’\(^{62}\) in 2014, the number of international visitors to the Gympie region has continued to improve, reversing a decline in numbers between 2010 and 2013. In 2017, 52,000 visitors chose to visit the Gympie region.

By comparison, Gympie region’s nearest neighbours – Noosa Shire, Fraser Coast and Sunshine Coast – are attracting more than double that of Gympie region at 134,000, 130,000 and 111,000 visitors respectively.

**International visitor nights**

Although Gympie region is generating more visitors than neighbouring Toowoomba (22,000 visitors) or Bundaberg (35,000 visitors), at 397,000 visitor nights in 2017, Gympie region is not extracting the same average length of stay from its visitors. Toowoomba for example, enjoys 799,000 nights per annum and Bundaberg 460,000 nights per annum.

It should be noted that both results have come from niche tourism opportunities, Toowoomba in the international education sector (creating an average length of stay of 30 nights) and Bundaberg as an employer of the backpacker market during fruit picking season, creating an average length of stay of 25 nights.

At 676,000 nights per annum, Noosa Shire is attracting almost one third more visitor nights than the Gympie region, while the Sunshine Coast is attracting over two million visitor nights (average length of stay 14 nights). Gympie region’s average length of stay is three nights.

**Average international spend per night**

While at $66 per night, Gympie region attracted a higher per night spend than neighbouring Toowoomba ($51) and Bundaberg ($36), of all ANC partners Gympie region, along with Fraser Coast (at $61) extracted the least amount of spend per night. Noosa extracted the most spend per night at $94, with Sunshine Coast at $77 per night.

**The backpacker market**

\(^{61}\)A partnership between the Sunshine Coast and Fraser Coast destinations, including the Gympie Region

\(^{62}\)International Marketing Partnership between Fraser Coast and Sunshine Coast, including Gympie Region and Noosa Shire
While the Sunshine Coast has had a medium size and reasonably stable proportion of Backpackers visiting the region over the last 10 years, Gympie region has had a much larger proportion of Backpackers and that proportion has been in decline for the last 10 years.

The difference in proportion and in long-term performance, highlights distinct differences between the visitor profiles for both regions.

The outcome of a declining proportion of backpackers for the Gympie region is that there is a small but corresponding growth from other higher yield international visitors’ eager to explore the region.

This (the attraction of higher yield international visitors to the region) is good news for the economic prosperity of the region and a strategy which the region should pursue.
Cooloola Coast Sub-Region

Domestic offering

Of the four sub-regions making up the Gympie region, Cooloola Coast dominates domestic holiday visitors with an average 61 per cent share of overnight domestic visitors to the Gympie region over the last 10 years, including a 66 per cent market share in 2017.

Containing 31 per cent of the region’s accommodation (26 properties) and almost half of its paid tourism attractions (10 attractions), Cooloola Coast, encompassing Rainbow Beach, Tin Can Bay and Cooloola Coast, fares well on consumer review sites as a peaceful beach holiday destination with a backdrop of scenic beauty.

Cooloola Coast’s top five accommodation properties, as ranked by Trip Advisor, are consistently rated at the highest level by visitors to the region. Visitation appears to be dominated by one night stays from visitors on their way to or from Fraser Island or, by those ensuring an early visit to Barnacles Dolphin Centre.

International offering

In 2016, German and United Kingdom visitors accounted for almost half of the region’s 212,000 visitor nights.

Of the 212,000 international visitor nights spent in the Gympie region, 60 per cent or 76,200 nights were spent in backpacker accommodation with nearly all backpackers staying in or around the Cooloola Coast sub-region.

Both the German and UK markets are motivated by world class nature and coastal and aquatic experiences and consider, Fraser Island (K’Gari) as a must-do experience on their Queensland itinerary, second only to the Great Barrier Reef.

By leveraging its geographical position as a “gateway to Fraser Island” through the Australia’s Nature Coast partnership, Cooloola Coast region has done well to maintain one night stays from backpackers heading to or from Fraser Island.

Table: Sub-Regional Dispersal

Source: Tourism Specialists

Those travelling to visit friends and relatives (VFR) or attend to business had predetermined Gympie as their destination due to the nature of their trip – visiting a relative living in the region or going to a business meeting whose location was in the Gympie Region – and as such the destination was a secondary consideration. Holiday visitors had a choice of destinations and therefore remain the focus of further analysis.

Rated by value – cost v. experience.

Tourism and Events Queensland: Economic Profile of Gympie Region.


Tourism Australia International Profiles/Germany (note: safety, security and value are primary considerations across all markets).
However, when compared to neighbouring, Noosa, Sunshine Coast and Fraser Coast, the region is trailing in length of stay from its international visitors.

While the Gympie region and the Sunshine Coast region both attracted 10,000 German visitors in 2016, the Sunshine Coast was able to convert their visitation to 138,000 visitor nights, almost three times more than Gympie which generated 50,000 visitor nights, from its German visitors. It appears therefore, that the Sunshine Coast has increased its length of stay at the expense of Gympie region.

Extending length of stay in the region and creating dispersal to other sub-regions, presents an opportunity for the Gympie region. This is particularly so for the UK market that has the highest level of dispersal (32 per cent of all visitors will have 3-5 stops) and for whom heritage along with food and produce are motivators of travel. Both motivations are strengths for the Gympie region.

### Gympie City

**Domestic offering**

The increase to visitors in the Cooloola Coast sub-region came at the expense of the Gympie City sub-region that in 2008 had a 26 per cent share of all holiday visitors. This share has declined to less than 20 per cent in 2017.

While Gympie City has 40 per cent of all accommodation in the region (or 33 properties), of the top five accommodation properties ranked by Trip Advisor, only Lagoon Pocket (located in the Mary Valley sub-region) scored in the top range for value.

The majority of stays in Gympie City properties are one night stays and while most reviews were positive in terms of ‘fit for purpose’, it is obvious that the purpose is to overnight in Gympie accommodation (particularly in those that flank the Bruce Highway) before setting off to a final destination somewhere in Queensland.
In this respect, Gympie city is considered a utility stop, somewhere to travel through, as opposed to a destination or somewhere to travel to\textsuperscript{68}. Of the seven paid experiences that can be undertaken within Gympie City (or one third of the region’s total experiences), over half have a nominal entry fee of less than $20.00 per person. The Gold Mining and Heritage Museum and the Woodworks Museum, both offer a strong surprise and delight factor for visitors and both were reviewed as offering value for money.

In the last financial year, visitor numbers to the Gold Mine and Heritage Museum amounted to 9264\textsuperscript{69} or less than two per cent of all visitors to the Gympie region.

Mary Valley Country

\textit{Domestic offering}

The sub-region known as Mary Valley Country appears to be dominated by the Brisbane couple’s market, those seeking a romantic weekend or weekend recharge from the stresses of life in Brisbane.

The exceptions are Honeybee Farm, the sub-region’s newest accommodation operator, which is attracting some small group business and the wedding market and, Amamoor Lodge who are also active in the wedding market.

This part of the region is also in the early stages of developing a Food and Produce Tour to add even more value to Mary Valley Rattler steam train experience.

Domestic visitor numbers for this sub-region are not available through the Australian Bureau of Statistic’s National Visitor Survey (ABS NVS) as numbers are too small to provide accuracy.

Mary Valley accounts for 18 per cent of the region’s accommodation stock (or 15 properties) and the top five accommodation properties in this sub-region, as ranked by Trip Advisor\textsuperscript{70} are consistently rated at the highest levels by visitors. Visitation is dominated by one or two night stays, but unlike accommodation in Cooloola Coast, for those visitors choosing to visit Mary Valley, the accommodation is considered both the motivation and the destination.

The sub-region has three paid experiences and five signature events.

Kilkivan and Goomeri (The West)

\textit{Domestic offering}

Accommodation operators in this sub-region make up 11 per cent of the region’s entire accommodation stock.

Similar to Mary Valley Country, this sub-region’s top three properties are consistently rated at the highest levels with Kilkivan properties drawing visitation from the Sunshine Coast and Goomeri properties attracting overnight stays from as far away as Darwin and Emerald.

Like Gympie City, most visitors to Goomeri are couples staying one night on their way to somewhere else, usually going to or from Brisbane. In this respect, the region is also considered functional.

The region has one paid experience and two signature events including the Great Kilkivan Horse Ride, which encourages camping or SWAG style accommodation.

The Goomeri Pumpkin festival generates significant media profile for the region however most visitors are day trippers from Brisbane.

\textsuperscript{68}Interestingly, the Gympie City also has 27 properties listed on Air BnB.

\textsuperscript{69}Numbers supplied by Gympie Gold Mine and Historical Museum.

\textsuperscript{70}Rated by value – cost v. experience.
FACTS

• Of all its sub-regions, Cooloola Coast has dominated tourism for the last decade
• In FY 2017, Cooloola Coast accounted for 66 per cent of all visitors to the region
• Gympie City (including Mary Valley Country) has lost share to Cooloola Coast.

CONSIDERATIONS

What proportion of Council’s tourism marketing effort (and spend) should be afforded on recognising Cooloola Coast as the jewel in the region’s tourism crown versus, growing other sub-regions including Gympie City, to similar levels of visitation?

How does the region encourage better dispersal? What products do other sub-regions have that are worth dispersing for?

What strengths do the sub-regions have and how do they complement each other and the region? What gaps could the region fill? What can it own in Queensland?

Source: Destination Gympie Region Website
The region’s primary target markets

Priority domestic markets – Brisbane and Sunshine Coast

In the last two years, Brisbane has returned to its position as the Gympie region’s dominant source market for domestic holiday visitors. In 2015, Brisbane was almost pipped by a much closer source market, the Sunshine Coast.

Recently, the source markets for the Gympie region have contracted to the point where Brisbane and the Sunshine Coast now account for almost 70 per cent of all domestic holiday visitors in 2017.

Reliance on just two source markets places Gympie region in a vulnerable situation if for some reason that visitation should stop.

Gold Coast, Toowoomba and northern destinations within a two hour drive of the Gympie region should be considered as secondary domestic markets.

International markets – United Kingdom and Germany

International visitation to the Gympie region was dominated by the United Kingdom and German markets. Visitor numbers from both markets have rebounded over the last four years due to Gympie region’s participation in the Australia’s Nature Coast partnership introduced in 2014.

Collectively, visitation from these two markets account for 77 per cent of all international visitation.

The region’s natural environment and nature-based experiences provide a strong attraction for visitors from the United Kingdom (13,000 visitors) and Germany (10,000 visitors).

The region is also enjoying modest growth from the emerging Scandinavian market (4,000 visitors) and North America also contributes 11 per cent share of all international visitors to the region.

New Zealanders however are highly motivated by a combination of warmth and the esplanade style shopping, dining and beach precincts offered by Mooloolaba, Maroochydore and Noosa.

This market’s fly and flop mentality has remained a constant over the last decade.

Accommodation share

Of the 377,000\textsuperscript{1} international visitor nights spent in the Gympie region, only 9,000 nights (or six per cent of all nights) were spent in commercial accommodation. Sixty percent of all nights or 85,000 nights were spent in backpacker accommodation with nearly all backpackers staying in or around Cooloola Coast.

Compounding this, 33,000 international visitor nights were spent in no yield accommodation with (family or friends) and a further 15,000 nights were spent camping or caravanning.

This means that 91 per cent (or 343,000) of all international visitor nights in the Gympie region were spent in low value or no value accommodation.

\textsuperscript{1}Based on Specialist Tourism 3 x year average (actual nights in 2017 equal 397,000, TEQ Economic Profile).
Domestic holiday visitors, life stage and segments

Time and life stage

In one of Australia’s largest consumer behaviour studies\(^7\) into travellers, researchers studied over 6000 consumers to understand what variables they used to filter their travel options.

Two of the strongest variables in this study, time and life stage are subsequently used to identify and segment the market.

In terms of the Gympie region, the data suggests that a “weekend getaway” (2-3 nights) is a strength for the region, in the short to medium term.

Of the four life stage segments, the Gympie region shows a skew to both Empty Nesters and SINKs and DINKs, as per the graph below.

Travel motivations

When choosing a holiday destination, Empty Nesters are motivated by a number of variables. Their top five travel motivations (in order of importance) are – easy (to get to), been before, simple and uncomplicated, safe and familiar. By comparison, the SINKs/DINKs top five motivations are – easy (to get to), familiar, been before, low cost and safe.

---

\(^7\) Tourism and Events Queensland 2017.
What's the Motivation?

<table>
<thead>
<tr>
<th>Motivation</th>
<th>SINKs/DINKs</th>
<th>Young Families</th>
<th>Older Families</th>
<th>Empty Nesters</th>
<th>Overall</th>
</tr>
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<tbody>
<tr>
<td>Offers good value for money</td>
<td>17% ↓</td>
<td>24%</td>
<td>21%</td>
<td>23%</td>
<td>21% ↓</td>
</tr>
<tr>
<td>I could get there easily</td>
<td>33%</td>
<td>37%</td>
<td>37%</td>
<td>44% ↑</td>
<td>37%</td>
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<tr>
<td>Lots to see and do</td>
<td>16% ↓</td>
<td>22% ↓</td>
<td>14% ↓</td>
<td>16% ↓</td>
<td>18% ↓</td>
</tr>
<tr>
<td>Offers unique experiences</td>
<td>17% ↓</td>
<td>18% ↓</td>
<td>12% ↓</td>
<td>9% ↓</td>
<td>15% ↓</td>
</tr>
<tr>
<td>A familiar place I know</td>
<td>29%</td>
<td>29%</td>
<td>36%</td>
<td>26%</td>
<td>29%</td>
</tr>
<tr>
<td>Has great weather</td>
<td>17% ↓</td>
<td>19% ↓</td>
<td>19%</td>
<td>16% ↓</td>
<td>18% ↓</td>
</tr>
<tr>
<td>Offers all standards of accommodation</td>
<td>10% ↓</td>
<td>9% ↓</td>
<td>9%</td>
<td>10%</td>
<td>10% ↓</td>
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<tr>
<td>Not many people visit for holiday</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Represents the best of Australia</td>
<td>5%</td>
<td>8%</td>
<td>0% ↓</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Low-cost and budget</td>
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<td>25% ↑</td>
<td>24%</td>
<td>15%</td>
<td>23% ↑</td>
</tr>
<tr>
<td>Like to tell friends/family (social media)</td>
<td>5% ↓</td>
<td>10%</td>
<td>3% ↓</td>
<td>7%</td>
<td>7% ↓</td>
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<tr>
<td>Family-friendly</td>
<td>16% ↓</td>
<td>33% ↑</td>
<td>17%</td>
<td>15% ↓</td>
<td>21% ↓</td>
</tr>
<tr>
<td>Has great food and beverage</td>
<td>16% ↓</td>
<td>16% ↓</td>
<td>13% ↓</td>
<td>13% ↓</td>
<td>15% ↓</td>
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<tr>
<td>Has a variety of food options</td>
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<td>12% ↓</td>
<td>15%</td>
<td>10% ↓</td>
<td>11% ↓</td>
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<tr>
<td>Has a vibrant night life</td>
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<td>6%</td>
<td>0% ↓</td>
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<td>4% ↓</td>
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<tr>
<td>Is an iconic destination</td>
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<td>17%</td>
<td>9% ↓</td>
<td>13% ↓</td>
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<tr>
<td>Safe to visit</td>
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<td>43%</td>
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<td>Has major events</td>
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<td>12%</td>
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<td>9%</td>
</tr>
<tr>
<td>Simple and uncomplicated</td>
<td>21% ↓</td>
<td>26%</td>
<td>26%</td>
<td>33%</td>
<td>25% ↓</td>
</tr>
<tr>
<td>Has great service</td>
<td>5% ↓</td>
<td>9%</td>
<td>7%</td>
<td>5% ↓</td>
<td>7% ↓</td>
</tr>
<tr>
<td>Has great shopping</td>
<td>5% ↓</td>
<td>9% ↓</td>
<td>8%</td>
<td>3% ↓</td>
<td>6% ↓</td>
</tr>
<tr>
<td>Makes me feel welcome (like a guest)</td>
<td>10% ↓</td>
<td>13% ↓</td>
<td>11%</td>
<td>8% ↓</td>
<td>11% ↓</td>
</tr>
<tr>
<td>Has a reputation for events</td>
<td>6%</td>
<td>6%</td>
<td>9%</td>
<td>3% ↓</td>
<td>6%</td>
</tr>
<tr>
<td>I have visited this place before</td>
<td>29% ↓</td>
<td>28% ↓</td>
<td>40%</td>
<td>35%</td>
<td>31% ↓</td>
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<tr>
<td>None of the above</td>
<td>14% ↑</td>
<td>12%</td>
<td>13%</td>
<td>11%</td>
<td>13% ↑</td>
</tr>
</tbody>
</table>

Table: Domestic Holiday Visitors Travel Motivations
“I could get there easily” is the strongest motivation for both Empty Nesters and SINKs, providing a clear message for Gympie region to highlight now and when the new bypass brings the region even closer to Brisbane.

Travel motivations

Empty Nesters seek a relaxing, affordable, easy, friendly and safe experience from their weekend getaway. SINKs/DINKs want a relaxing, affordable, fun, friendly and safe experience.

The only difference between both segments is that the Empty Nesters want a weekend getaway that is “easy to get to”, whereas SINKs/DINKs want fun!
<table>
<thead>
<tr>
<th>The Occasion - “Weekend Getaway” (2-3 nights)</th>
<th>Life Stage</th>
<th>SINKs/ DINKs</th>
<th>Young Families</th>
<th>Older Families</th>
<th>Empty Nesters</th>
<th>Overall</th>
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<tr>
<td>Adventurous</td>
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<td>Affordable</td>
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<td>Exciting</td>
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<td>Natural</td>
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<tr>
<td>Developed</td>
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<td>6%</td>
<td>3%</td>
<td>4%</td>
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<tr>
<td>Sophisticated</td>
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<td>Cultural</td>
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<td>Exotic</td>
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<td>3%</td>
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<td>Uncharted</td>
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<td>3%</td>
<td>1%</td>
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<tr>
<td>Romantic</td>
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<td>Friendly</td>
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<td>36% ↓</td>
<td>46%</td>
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<td>8%</td>
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<td>11%</td>
<td></td>
</tr>
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<td>Busy</td>
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<td>3%</td>
<td>3%</td>
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<td>Vibrant</td>
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<td>5%</td>
<td>4%</td>
<td>6%</td>
<td>5% ↓</td>
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<td>Safe</td>
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<td>35%</td>
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<td>Aspirational</td>
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<td>7%</td>
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<td>Rejuvenating</td>
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<td>16%</td>
<td>11%</td>
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<td>Authentic</td>
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<td>7% ↓</td>
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</tr>
<tr>
<td>Fun</td>
<td>34% ↓</td>
<td>39%</td>
<td>27% ↓</td>
<td>26% ↓</td>
<td>34% ↓</td>
<td></td>
</tr>
<tr>
<td>Easy</td>
<td>31% ↓</td>
<td>40%</td>
<td>38%</td>
<td>37%</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>Welcoming</td>
<td>24% ↓</td>
<td>27% ↓</td>
<td>34%</td>
<td>26% ↓</td>
<td>26% ↓</td>
<td></td>
</tr>
<tr>
<td>None of the above</td>
<td>10% ↑</td>
<td>8%</td>
<td>9%</td>
<td>6%</td>
<td>8% ↑</td>
<td></td>
</tr>
</tbody>
</table>
Trends impacting tourism

In considering the future for tourism in the Gympie region, it is important to also understand the forces and factors that are occurring in its macro and micro environments, factors that may help shape the region’s ongoing strategy or conversely may impact on Council’s operating environment and ability to deliver the strategy.

The trends being considered in this strategy are those identified by the Commonwealth Science and Industrial Research Organisation (CSIRO) as follows.

<table>
<thead>
<tr>
<th>Mega trends</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Dimension</strong></td>
</tr>
<tr>
<td>1.2</td>
</tr>
<tr>
<td>1.3</td>
</tr>
</tbody>
</table>
Global macro trends

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Trend Classification</th>
<th>Description</th>
<th>Impact for Gympie</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1</td>
<td>Time is a Commodity</td>
<td>Virtually all people in advanced economies and most people in emerging economies use time as the FIRST and primary filter for all decision making.</td>
<td>The value of time has become more important than the value of money to the consumer. Time to travel to destination (easy to get to) can therefore represent real value to the Gympie region consumer.</td>
</tr>
</tbody>
</table>

Global trends

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>3.1</td>
<td>Corporate Social Responsibility</td>
<td>Consumers expect brand to mean something and stand for values that they can compare to their own.</td>
<td>Consumers, particularly millennials, want more from their brands. They expect brands to reflect their values so consumers are looking for what a brand stands for and what it returns to the community.</td>
</tr>
</tbody>
</table>

National trends

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Trend Classification</th>
<th>Description</th>
<th>Impact for Gympie</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1</td>
<td>Household Debt</td>
<td><img src="image" alt="Household Finances Graph" /></td>
<td>Rising household debt within a low interest environment is making the Australian domestic market highly susceptible to interest rate rise. When combined with low wage growth, a broadening of key markets should be considered.</td>
</tr>
<tr>
<td>4.2</td>
<td>Low Wage Growth</td>
<td><img src="image" alt="Low Wage Growth Graph" /></td>
<td>Wages growth is at its lowest point in twenty years. Consumers are using savings to maintain lifestyle. Allowing for CPI, real average earnings have declined 1.5 per cent to 1.8 per cent in the last twelve months.</td>
</tr>
<tr>
<td>Dimension</td>
<td>Trend Classification</td>
<td>Description</td>
<td>Impact for Gympie</td>
</tr>
<tr>
<td>-----------</td>
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<td>-------------</td>
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</tr>
<tr>
<td>4.3</td>
<td>Static Private Sector Growth</td>
<td>Recent employment growth has been isolated to the public sector.</td>
<td></td>
</tr>
</tbody>
</table>

State trends

<table>
<thead>
<tr>
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<th>Description</th>
<th>Impact for Gympie</th>
</tr>
</thead>
</table>
| 5.1       | Domestic Visitation  | **National:** Interstate visitors share of Total has remained stable at 32 per cent – 33 per cent over last 10 years. Holiday has remained around 29 per cent.  
**Queensland:** The interstate share of Total visitors has declined from 33 per cent to 29 per cent over last 10 years and holiday from 36 per cent to 32 per cent. Fewer holiday interstate in 2017 than 2008.  
**NSW:** Interstate total and holiday remained consistent last 10 years – 32 per cent and 33 per cent respectively.  
**Victoria:** Now attracts more total interstate than Queensland.  
**Others:** Interstate important part of NT with 58 per cent of Total; lower for WA with 14 per cent; SA consistent on 37 per cent. | Victoria has picked up gains at Queensland expense, particularly in interstate visitors. Length of stay has been shortening nationally over last 10 to 14 years. Interstate visitation should not be a primary market for Gympie region. |
## Tourism product trends

<table>
<thead>
<tr>
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<th>Description</th>
<th>Impact for Gympie</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.1</td>
<td>Different</td>
<td>From the planning of the future travel beforehand; the travel itself; and after they return from travel, the consumer is looking for travel of almost any kind to make them feel “different”. The “travel” is required to change how they feel and provide a moment in time they can remove themselves from their everyday. The intensity of their expectations can vary from a weekend camping to a month in Europe, however “different” is a prime motivator of travel.</td>
<td>Whilst beach and water based travel remains a foundation of travel in Queensland, the consumer is asking “What’s different.” There is a deep desire to ensure that “different” isn’t more of the same and this in turn is driving a decline in repeat travel as consumers explore their options. This significantly increases the potential of smaller regions with experiences that are lesser known – but just as exciting.</td>
</tr>
<tr>
<td>6.2</td>
<td>Soft Adventure for ‘Young at Heart’</td>
<td>The share of world’s population over the age of 60 increased from eight per cent in 1950 to 12 per cent in 2013. According to forecasts, by 2050, this share will reach 21 per cent. The aging population is relatively fitter and healthier than previously, and they do not consider themselves too old to travel. They no longer seek material goods, but rather life experiences and they demand travel products that are more ‘experience-driven’.</td>
<td>Older travellers have the highest levels of disposable income; the highest levels of available time; and the highest levels of interest in travel. Importantly this group is still in search of soft adventure in their travels which presents opportunities away from the mainstream.</td>
</tr>
<tr>
<td>6.3</td>
<td>Millennials</td>
<td>Millennials are expected to represent 50 per cent of all travellers by 2025. Their focus is on exploration, interaction, and emotional experience and they expect a greater link between tourism services and their everyday life.</td>
<td>Millennials have a “champagne taste on a beer budget” approach which is translating to shorter and less expensive journeys. This is a highly competitive market segment with multiple categories (including the fast moving consumer goods sector) competing for the same disposable income.</td>
</tr>
</tbody>
</table>
With a growing middle class, their search for value for money and different travel interests, many destinations in the emerging and developing regions have managed to develop and exploit their tourism potential to attract and retain visitors.

A similar trend is occurring within domestic tourism with an emerging middle class looking for "new", "different" or emerging destinations.

In the never-ending pursuit of "different", new and emerging destinations are continuously appearing. Domestically this is manifesting itself in niche product associations such as "spas in Daylesford"; new opportunities such as ‘foraging tourism’; and, the redefining of old favourites such as camping into glamping.

Real, authentic, original, artisan, all express the consumer desire for the natural state of things. This growing movement is expanding out across categories at speed, however along the way the word ‘authentic’ has lost its meaning to consumers through misuse and overuse.

This reality is delivered through so many smaller communities across the country. The potential to deliver "real" experiences and "real" people should be considered within the overall strategy.