



# SCENIC RIM TOURISM STRATEGY 2017-2021

Final Strategy  
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Prepared by EarthCheck for



#### **DISCLAIMER**

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

Images courtesy of Tourism and Events Queensland, Scenic Rim Regional Council and Tamborine Mountain Chamber of Commerce & Industry.



# EXECUTIVE SUMMARY

Recognising the importance of tourism as an economic driver for the region, Scenic Rim Regional Council has identified the need to develop a Tourism Strategy for 2016 to 2021, following on from the achievements of the 2011-2016 Tourism Strategy. The purpose of this Strategy is to serve as a guide for tourism development and destination management for the next five years, to help ensure the long-term viability and sustainability of this vital sector.

## 2021 VISION

Grow the value of tourism to \$300 million by 2021

## MISSION

Develop vibrant and sustainable tourism and genuine visitor experiences that celebrate the region's unique and world-class natural assets, rural and small town character and community values

## GOALS

- |  |                                   |
|--|-----------------------------------|
| 1. Increase the value of tourism         | 3. Dispersal of seasonal visitors |
| 2. Increase market share of key segments | 4. Dispersal of visitors          |

## CATALYST PROJECTS

1. Increase the funds for marketing through new funding options for Tourism and Events development
2. Increase marketing efforts in partnership with Brisbane Marketing and Gold Coast Tourism targeting the 200km drive market and emerging fly-drive interstate markets (Sydney and Melbourne).
3. Maintain and continue to grow a Tourism Events Fund to support the growth and development of events that attract at least 30% of their attendees from outside the region and actively contribute to building the region's brand.
4. Align the efforts of the three local tourism organisations to create a seamless message pre-trip and en route.
5. Invest in ongoing research and partner with a university to collect and monitor primary visitor data

## ENABLERS OF SUCCESS

1. Industry-led Clusters
2. Accessibility
3. Iconic Attraction
4. Investment Attractions
5. Unity



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# 1. SETTING THE SCENE

## 1.1 Role of the Tourism Strategy

The Scenic Rim region is a thriving rural area set in the foothills of the Great Dividing Range. Home to nearly 38,000 residents, the region covers approximately 4,200 square kilometres and is located one hour south of Brisbane and half an hour inland from the Gold Coast.

Known for its breathtaking scenery and boasting a wide selection of National Parks and nature-based opportunities, the region is also home to charming rural communities. Recognising the importance of tourism as an economic driver for the region, Scenic Rim Regional Council has identified the need to develop a Tourism Strategy for 2016 to 2021, following on from the achievements of the 2011-2016 Tourism Strategy. This Tourism Strategy is a progression from the 2011-2016 Tourism Strategy, and as such builds off the previous strategy with some key elements remaining throughout this document.

Scenic Rim Regional Council appointed EarthCheck Consulting to set the five year direction for tourism in the Scenic Rim.

**The purpose of this Strategy is to serve as a guide for tourism development and destination management for the next five years (from 2017).**

This Tourism Strategy for the Scenic Rim provides:

- a) An overview of the importance of tourism to the region;
- b) A review of key plans and strategies of the major tourism stakeholder organisations that impact the Scenic Rim;
- c) A brief destination analysis in terms of visitor trends, projections and SWOT analysis;
- d) An outline of the region's mission, vision and goals for the next five years;
- e) A detailed action plan to help achieve the goals;
- f) Measureable Key Performance Indicators;
- g) Detailed visitor profiles; and
- h) Destination benchmarks and case studies.

**This Tourism Strategy incorporates the feedback from community, visitors, tourism operators, Scenic Rim Regional Council and stakeholders. Information was gathered via a range of consultation methods including workshops, small group meetings and a visitor surveys.**



## 1.2 Process in Developing the Strategy

Key actions in preparing the strategy include:

### PHASE 1: RESEARCH

- Comprehensive **Policy and Strategy Review**;
- **Visitor Market Review** - detailed analysis of Scenic Rim's current visitor market/ demand drivers, identifying current and potential future priority market;
- Supply-side **product and experience audit**;
- Review of **governance and partnership opportunities**;
- **Visitor volume/value/market mix projections**, forecasted out within the timeframe of the Strategy;
- **Competitor analysis** and benchmarking; and
- Review of **current tourism service delivery**;

### PHASE 2: CONSULTATION

- **Visioning workshop** with Strategy Steering Group;
- Preparation of **directions paper** as the basis for consultation program;
- **Industry and Stakeholder consultation**; and
- Analysis of consultation and research findings & presentation of **interim findings**.

### PHASE 3: DEVELOPING

- Development of the **Draft Strategy** with the established **vision, objectives** and **prioritised program of actions**, drawing together the results of consultation and analysis.

### PHASE 4: FINALISING

- Preparation of an **evaluation and monitoring framework**; and
- Preparation of the **Final Strategy**, incorporating feedback on the Draft Strategy



## 1.3 The Destination

Located in close proximity to Brisbane and Gold Coast, the Scenic Rim has become a popular and well-established destination for domestic day trippers seeking an escape from the city. Home to six National Parks, World Heritage listed rainforests and three dams, the Scenic Rim offers a wide range of outdoor activities and walking trails in remarkable natural settings.

Apart from the picturesque natural environment, the Scenic Rim is also renowned for its high quality local produce and its vibrant artistic community. The region is home to 17 wineries and offers a number of outstanding gourmet experiences, providing an opportunity for the visitors to indulge in divine food and wine in great rural settings.



Generating a combined contribution of more than \$400 million to the local economy, agriculture and tourism are established income sources for the region. These attributes have encouraged regional partners to invest in celebrating the area's rural production and farming heritage through the Eat Local Week, an annually held regional festival. The event attracted in excess of 22,000 visitors in 2015.

The Scenic Rim consists of seven precincts with main towns being Tamborine Mountain, Beaudesert, Kooralbyn, Boonah, Rathdowney and Canungra. Each precinct has its own unique characteristics and set of experiences available to visitors. While the Scenic Rim's southern region is famous for its wide range of available outdoor adventures and farms, the western precinct is mainly known for its unique rural charm. The area's two dams are also a popular destination for lovers of watersports and fishing. Home to Tamborine Mountain and Lamington National Park, the eastern part of the region is a tourism hub. Precincts such as Tamborine Mountain have a wide range of tourism infrastructure available, and the precinct is well known for its enticing variety of charming cafes and restaurants as well as the Gallery Walk and scenic view that the precinct offers. The northern part of the Scenic Rim is well known for its vibrant horticultural areas local built heritage, whilst the central precinct of the region has a strong rural town vibe. Eastern part of the region is home to the Lamington National Park.





## 1.4 Tourism in the Scenic Rim Region

The seven precincts of the Scenic Rim align into the three major tourism regions of the Scenic Rim; Tamborine, Boonah-Rathdowney and Beaudesert.

Tamborine Mountain is a focal point for tourism in the region. It hosts a wide range of cafes and restaurants that meet demand from significant visitor volumes. Tamborine Mountain presents visitors with stunning views and a quaint village atmosphere. Gallery Walk is the main node of commercial visitor activity, characterised by a concentration of visitor-oriented shops, galleries and eating establishments. Tamborine Mountain also offers visitors a range of accommodation options, although stock is variable in terms of quality and price. The commercial node of North Tamborine has a greater focus on servicing the needs of local residents. It includes a number of community facilities and a range of eating establishments and shops. Tamborine Mountain is home to some of the region's most significant built attractions from Thunderbird Park and Skywalk to internationally renowned wineries and conference facilities.

The Boonah-Rathdowney subregion extends geographically from the township of Boonah, west to Cunningham's gap, north to the locales of Harrisville, Mutdapilly and Peak Crossing, and south to the NSW border. The main townships in the area include Boonah, Kalbar, Rathdowney and Aratula. The area has a vast array of natural attractions, and is equally well stocked with a range of accommodation options to suit all types of budgets. Arts and culture are a key strength of the area and adventure and outdoor activities take advantage of the surrounding lakes and mountains. However, there are few tour options or packaged experiences available and eating options are limited. Limited opening hours also restrict tourism activities and yield.

The Beaudesert subregion includes the World Heritage Gondwana Rainforests and the Lost World Valley. Although not a natural tourism destination itself, the commercial hub of Beaudesert provides the gateway to explore this subregion. Weekends are very quiet and on Sundays, in particular, retail and cafes in the main street are mostly closed.



## 1.5 Holistic Approach to Destination Management

Tourism is a sector of the economy where local government's direct investment in tourism marketing, products and services is targeted primarily at non-residents – the end economic, social and environmental benefits to communities largely being derived from the resulting visitor spending.

The move towards describing tourism strategies in a 'destination' context is an important one. Individual tourism products and experiences often grab the headlines, but in a holistic sense, planning at destination level is essential. Destination planning is a step forward from traditional destination marketing roles and provides a more holistic and integrated approach to understanding the visitor economy potential of each destination, and the best methods of maximising that potential.

The visitor economy is much more than the traditional focus on holidays – it includes all leisure travel, and travel associated with business, events, visiting friends and relatives, and travel associated with health and education.

In leading destinations, tourism infrastructure planning has also shifted towards a demand-led rather than supply-led approach. In the past, local governments have relied heavily on public infrastructure to attract visitors; however, the mentality of 'build it and they will come' no longer is enough to compete. **To attract visitors, destinations must understand their wants and needs.**

Local governments' role now has greater emphasis on facilitation and planning for tourism. This requires collaboration with tourism organisations and the private sector to streamline processes. **A clear, strategic understanding of what products and experiences attract visitors and what type of investment is needed to sustain or enhance that appeal is critical to destination success.**

Figure 1 (right) shows the wide range of infrastructure and services touched on in a typical visitor journey, which collectively help to create a strong sense of place within visitor destinations.

In developing a picture of what Scenic Rim's strengths and opportunities are in relation to its product and experience strengths, experience-based planning is the best approach to tourism destination planning as it takes into account all elements of a visitor's interactions with place and people.

Scenic Rim Regional Council is ideally placed to perform the all-important 'destination management' role to ensure that of all these elements are brought together to offer seamless and compelling experiences for visitors.

**Figure 1: Tourism Destination Assets**



## 1.6 Local and Regional Policy Context

The contribution of tourism in the Scenic Rim region is well-recognised and thus has been incorporated into a wide number of strategies and plans at local, regional and state levels to direct planning, economic and social outcomes. The below provides a brief summary of selected key strategies that play an important role in tourism:

### Local Context:

#### ***Scenic Rim Tourism Signage Strategy 2013-2015***

The Signage Strategy was prepared as a response to recognition of the immediate growth opportunity provided by the drive tourism market and the need for a co-ordinated approach to managing and delivering the region's drive experiences.

The Signage Strategy intended to deliver the “essence” of the region's tourism experience via pre-trip and en route planning tools to grow the region's share of the Queensland drive market. The document recognises the region's signage infrastructure already in place, and places the core focus on the development of tourism signage that informs, directs and disperses visitors throughout the Scenic Rim. Management strategies and actions recommended throughout the document aim to maximise the value of signage in the region, so to attract increased visitor numbers to the region and to provide flow-on effects to the local tourism industry.



The overall goals of the Signage Strategy were to:

- Keep the visitors safe;
- Grow the market share;
- Increase repeat visitors;
- Encourage dispersal;
- Increase visitor spend.

In order to achieve these goals, the Strategy identified five priorities that included:

- Consistent approach to signage;
- Give visitors something to brag about;
- Create a sense of arrival;
- Showcase the region's experiences;
- Link precincts and attractions.

With signage being one of the most commonly mentioned topics during stakeholder consultation, a review of the signage strategy is urgently recommended.



## Regional Context:

### ***Brisbane Destination Tourism Plan 2014 – 2020***

The Brisbane Destination Tourism Plan aims to position the Brisbane Region as a world-class tourism destination that is:

- A rising new world city in Asia Pacific offering a compelling and inclusive blend of quality of life, lifestyle and culture;
- Friendly, safe, engaging and accessible;
- A fascinating and accessible mix of river's edge, urban precincts, bayside villages, islands, urban bushland, hinterland environs and expansive inland waterways and fertile countryside
- An innovative lead in tourism experiences and high-quality service delivery
- A getaway to Australia's natural advantages in terms of its natural assets.



With the goal of increasing the value of visitor economy to \$8.4 billion by 2020, the plan established a clear vision of getting Brisbane recognised as a serious player in Asia Pacific by 2020, being Australia's most welcoming, spirited and energised subtropical capital city that offers world-class major events, coastal, island and countryside experiences. In order to achieve this goal, the document sets clear priorities as follows:

- Build on strong economic foundation through delivering increased investment and tourism demand;
- Leverage the destination advantage and deliver improved visitor experience;
- Embrace Brisbane' natural advantage through delivering competitive advantage.

It is important that Scenic Rim plans its strategic tourism framework within the context of the region's DTP – Scenic Rim provides important parts of the region's overall set of visitor experiences and both areas are sources of trade / visitation for one another.

### ***Brisbane Regional Tourism Investment and Infrastructure Plan 2008-2018***

This report aimed to provide direction for the sustainable development of tourism in the Brisbane Region to 2018. Ten catalyst projects for the region were identified. One of these catalyst projects is in the Scenic Rim: "Developing a major walk with associated huts and high quality lodge accommodation infrastructure in the Scenic Rim." This project has recently been given approval by the Queensland Parks and Wildlife Service (QPWS) as a new nature-based tourism project that offers a six-day walk through the Scenic Rim. The project includes the establishment of two new eco-camps, 18 kilometres of new bushwalking track and a number of new mountain bike tracks. Although published in 2008, the report continues to provide a useful investment context.



### ***Gold Coast and Hinterland Tourism Opportunity Plan (TOP) 2009-2018***

The Gold Coast and Hinterland Tourism Opportunity Plan 2012-2018 (TOP) was developed to provide direction for the sustainable development of tourism in the Gold Coast region and identifies a significant number of catalyst, investment and capacity building projects. A large part of the Gold Coast Hinterland, including the Gold Coast food and wine trail is located in the Scenic Rim Regional Council area, creating a need for cross border communication and collaboration.



### ***Gold Coast Destination Tourism Management Plan 2014-2020***

In this report Hinterland and Scenic Rim linkages are identified as an opportunity. The Gold Coast Hinterland experiences compliment Gold Coast product as it provides a high quality visitor experience which includes World Heritage-listed sub-tropical rainforests, national parks, scenic lookouts, picnic areas, walking trails and waterfalls. As Gold Coast hinterland is often closely associated with the Scenic Rim, the tourism outcomes for the region can therefore be maximised by collaborating closely with the Gold Coast tourism and aligning the target markets, strategy values, actions and priorities with the Gold Coast City Council's Tourism Strategy.



## **Potential Structural Changes**

Globally, economic benefits derived from the visitor economy are widely recognised, as is the need for investment to deliver sustained growth. However, there is an increasing trend away from reliance on public sector support as the sole means of providing support. In an increasingly competitive global visitor economy, there is recognition that public sector investment on its own can no longer generate the investment needed to deliver growth.

Queensland tourism partners have long recognised that the State has faced a number of tourism challenges – while visitation has been rising in line with national trends, it has been consistently losing market share to Victoria and NSW.

Despite its best efforts, Queensland's tourism industry has been unable to remedy its structural inefficiencies and funding uncertainty.

Throughout Australia, the limits of public sector funding of the tourism industry are acknowledged. Alternative funding options are actively being considered at state, regional and local levels across all States. In Queensland, discussions with industry and government have led to the conclusion that reform of this nature needs to be 'driven' by industry, supported by strong industry consensus and presented for potential government support.

Queensland Tourism Industry Council (QTIC) has recently published a draft business case setting out a potential solution to the challenges facing the industry. The far-reaching proposals advocate structural change at State and regional levels, with funding support delivered via a new State-wide visitor levy (rental of accommodation units) and a single State-wide membership fee which would be utilised to support local tourism organisations.







## 2. DESTINATION ANALYSIS

### 2.2 Tourism Megatrends - Influences on the Scenic Rim

Megatrends are long-term trends affecting social, economic, environmental and political dimensions of society. Megatrends that are likely to influence the way that tourism develops generally within the Australian economy and that might influence consumer behaviour include:

*Table 1: Key Megatrends Likely to Influence Tourism in Australia*

<b>Economic:</b>	<b>Social:</b>
<ul style="list-style-type: none"><li>• Macro-economic conditions and associated impacts on consumer confidence, will affect Australia's capacity to attract inbound tourism markets.</li><li>• International conditions will influence the national 'economic mood' and impact upon consumer confidence even though the GFC has not been as pronounced in Australia.</li><li>• A strong Australian dollar and increases in capacity on certain international routes will continue to generate strong outbound tourism demand.</li><li>• Human capital will become more valued in tourism (e.g. skills and training will become more important).</li><li>• Continued emphasis on value for money.</li></ul>	<ul style="list-style-type: none"><li>• An aging and increasingly affluent domestic population will increase travel demand.</li><li>• Australians will stay in the workforce longer; semi-retirement and flexible work patterns will influence travel choices and opportunities.</li><li>• Increasing interest in health and well-being will influence travel patterns and stimulate health and medical tourism.</li><li>• Terrorism, health alerts and security issues will continue to influence global travel patterns; Australia will continue to be seen as a 'safe' destination for inbound tourists.</li><li>• The emergence of China and India as global powers will generate growth of the 'middle class' in these countries and will stimulate outbound travel from those countries; the ability of Australia to attract these markets will be influenced by its capacity to offer products and services of interest to these markets.</li><li>• Unique, meaningful and emotionally fulfilling tourism experiences will receive emphasis over products; branding and marketing needs to address this aspirational component of consumer</li></ul>

	<p>decision making.</p> <ul style="list-style-type: none"> <li>• Tourism will increasingly become an 'investment in the self'; purchase decisions are motivated by a need to 'invest' in personal growth and fulfilment.</li> </ul>
<p><b>Environment:</b></p> <ul style="list-style-type: none"> <li>• Awareness of environmental issues will continue to influence consumer choice, although price will remain a key factor in consumer decision-making.</li> <li>• Oil scarcity and rising oil prices will impact upon travel patterns.</li> <li>• Environmental groups will become more organised and more influential in planning and policy making.</li> <li>• Increased environmental awareness and social responsibility will continue to influence purchase decisions</li> </ul>	<p><b>Technology:</b></p> <ul style="list-style-type: none"> <li>• Consumer uptake of new mobile technologies will continue to increase, and change the way people search for information, book and pay for their travel.</li> <li>• Social media tools and interactive technologies will become increasingly important in consumer purchase decisions.</li> <li>• Online technologies will reduce costs, increase reach and add value to consumers purchase decisions.</li> <li>• Consumers will seek out 'facilitated' travel decision-making (e.g. websites that offer suggestions, bundle and have easy payment functionality).</li> </ul>

These megatrends have a number of potential implications for travel to and within the Scenic Rim region:

- South East Queensland (SEQ) will continue to consolidate its position as an economically diverse and dynamic region with an increasingly affluent population;
- Demand for short break leisure travel, business, event, recreation and conference travel will increase particularly from Brisbane and SEQ more generally, but travel will increasingly be for multiple purposes (e.g. events and leisure; business and recreation);
- SEQ will continue to be an attractive location for serious recreation, leisure and sport events. Scenic Rim can become a destination of choice for such events;
- The two international airports that service the SEQ region (Brisbane and Gold Coast) will continue to be the major gateways into the region;
- Regional internet and communication services will continue to influence operators' capacity to harness online technologies and social media;
- Public concern for environmental issues will continue to increase and this will influence consumer choice;
- Work patterns will become increasingly more flexible; mid-week breaks will become increasingly art of the offer and can be used to address weekly peaks and troughs in demand;
- Growing interest in health and well-being as a purpose of travel will generate new opportunities for tourism development, and can be used to add value to existing products;
- Business and conference travel is becoming increasingly blurred with leisure travel;
- Australians have one of the highest uptakes of new technologies in the world and this trend is likely to continue, influencing how people investigate, make decisions and purchase products in the Scenic Rim and around the globe.

## Long Term Tourism Outlook & Trends:

### *The 2030 Traveller:*

#### *Growing Global Outbound Tourism*



**3.3%p.a. increase in international arrivals** globally until 2030, equating to an additional 43 million international arrivals each year



**Strongest growth annually from Asia-Pacific region**, reaching over half a billion visitors travelling to the Asia Pacific by 2030 and increasing their global share by 8%



Outbound **tourism expenditure from China has grown by double digits** every year since 2004

#### *By 2030...*



The world will be predominantly urban, with **over 5 billion consumers living in cities**.



Connectivity will become standard, with travellers **expecting available Wi-Fi anywhere on the globe**.



With **Over a billion extra people travelling in 2035**, responsible tourism is more likely to become increasingly predominant.

### *National Tourism Trends*



Tourism Research Australia (TRA) has forecasted **domestic and international visitors to grow by 2.7% and 4.1% per annum respectively by 2026**.



The National Tourism 2020 goal is to achieve **more than \$115 billion in overnight spend by 2020** (up from \$70 billion in 2009), with linear trend growth estimated at \$97 billion at the time.



As of September 2015, **overnight visitor spend reached \$97.1 billion, up by 8.6%p.a.**



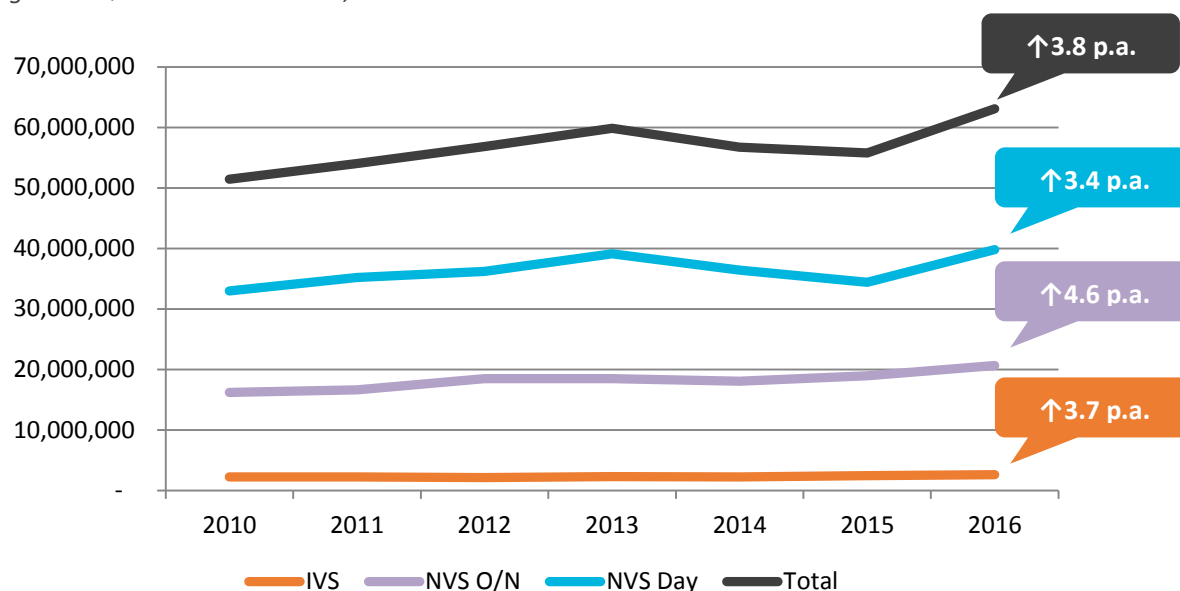
In 2020, **the top inbound markets to Australia by expenditure will be China**, followed by the United Kingdom, United States of America, New Zealand and Japan.



### Queensland Tourism Trends

Since 2010, Queensland's total visitation number has seen a significant increase, reaching a record 62.5 million visitors as a result of 3.8% per annum growth (See Figure 2). Domestic overnight visitation numbers have greatly contributed to this increase, growing by 4.6% per annum and reaching 20.3 million people. Overall international tourism has also grown, increasing by 10% in total since 2010 and reaching 2.4 million visitors.

Figure 2: Queensland Visitation, 2010-2016



### Scenic Rim Assumptions

The data provided in this section of the report is drawn from the National and International Visitor Surveys conducted for Tourism Research Australia using an intercept and phone survey sample methodology. The data used in this report are for those visitors that listed a location within the Scenic Rim which is made up of three smaller local areas (SA2) being Tamborine-Canungra, Boonah and Beaudesert.

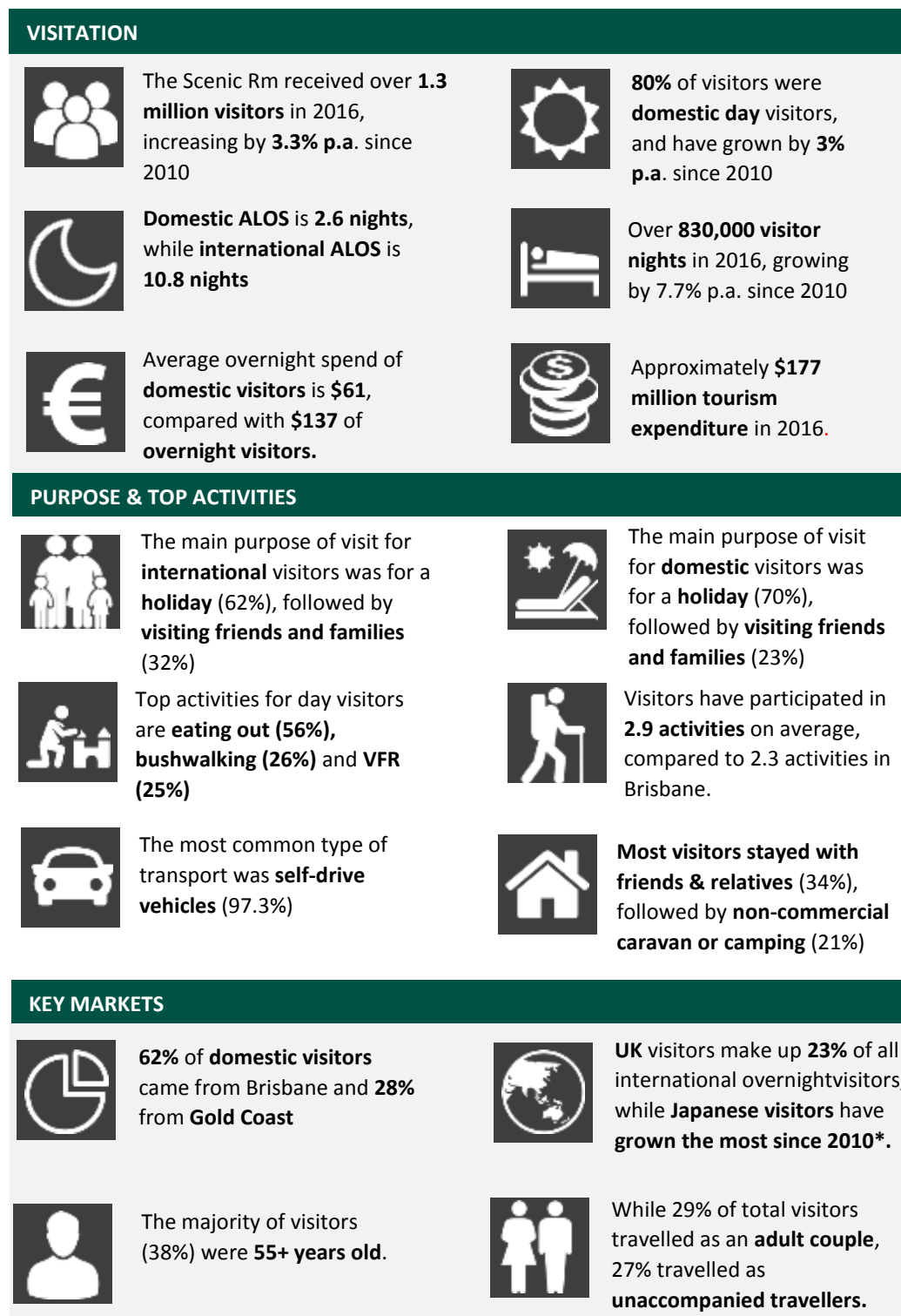
The data is aggregated and averaged over five years for detailed analysis (such as seasonality and international markets) due to small sample sizes. This report acknowledges the following limitations to the data:

- International day visitors are not measured through this methodology and are therefore underrepresented in the data provided;
- Due to the small sample size, some international markets and those travelling for a purpose (events, weddings, conferences, etc.) do not accurately portray the visitor numbers experienced by operators. This data is considered incomplete (but not incorrect).
- Expenditure data is collected at a national level and apportioned to regions by Tourism Research Australia every 2-3 years. The regional apportionment provided for Scenic Rim visitors are used in this report.

## 2.3 Visitor Market Analysis

The following data (see Figure 3) summarizes key visitor trends and profiles for the Scenic Rim for the Year Ending March 2016. For a more detailed visitor analysis, see Appendix A.

Figure 3: Scenic Rim Visitation Summary

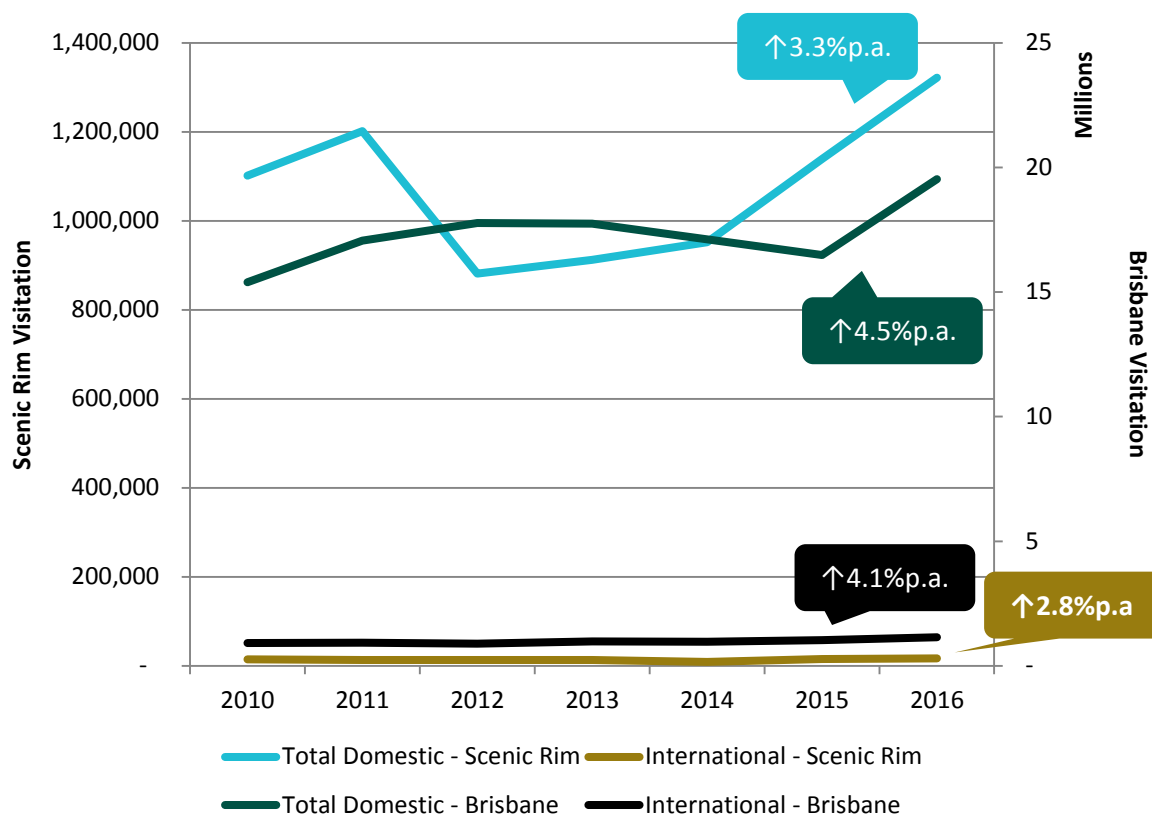


\*These figures are based on those staying overnight in the Scenic Rim, excluding international day visits. Primary research is needed to more accurately define the size and mix of the international market.

## Visitation

In the Year Ending March 2016, the Scenic Rim received over 1.3 million visitors, of which the large majority (80%) were domestic day visitors, 19% were domestic overnight visitors and 1% were international visitors. The Scenic Rim region received 6.5% of the Brisbane Region's total visitation during 2015/16. Both domestic and international visitation increased over the five year period since 2010, however average growth took place at a slower pace than for the Brisbane region as a whole (See Figure 4).

Figure 4: Scenic Rim and Brisbane Visitation (2010-2016)



It is important to note that the data provided through the National and International Visitor Survey is both a sample survey based on population assumptions and limited by the relatively small sample size. It excludes visitors under the age of 15 and trips of less than 40km from home, and trips for reasons of personal business. It also relies on visitor recall of the destinations visited, and excludes international day trips taken from the Gold Coast and Brisbane.

Further research is needed to give an accurate picture of total visitation. Analysis of the traffic count data provided by the Department of Main Roads by the Tamborine Mountain Chamber of Commerce shows a very different story. Based on extensive local surveys, car park observations and discussions with bus companies and locals it suggests visitor numbers driving up to the Mountain could be more than double that estimated by the NVS / IVS data reported here. This analysis shows visitor numbers to Tamborine Mountain would be likely closer to 1.1M – 1.3M visitors on a conservative estimate.



## Visitor Nights

Scenic Rim received approximately 836,000 visitor nights (2% of the Brisbane Region's visitor night share), which has grown on average by 7.7%p.a. since 2010. Approximately 78% of visitor nights are from domestic visitors, while approximately 43% of Brisbane's visitor nights are from domestic visitors. International visitors to Scenic Rim stay for an average of 10.8 nights (20.8 nights in the Brisbane region), while domestic visitors stay for an average of 2.6 nights (3.1 in the Brisbane region).

## International Visitor Origins

Due to the small sample size for visitation to the Scenic Rim, analysis of the International market is limited to those staying overnight in the Scenic Rim. As a result, the primary data presented here is the Brisbane region data with commentary added on the observed Scenic Rim trends.

The top five international visitor country origins for the Brisbane regions in 2016 were:

Brisbane Region:

1. China (18%)
2. New Zealand (16%)
3. United Kingdom (11%)
4. USA (7%)
5. Germany (5%)

The data for those staying overnight in the Scenic Rim suggests that traditional 'western' markets such as the UK, USA and New Zealand are most likely to stay in the region. Anecdotal evidence from local operators suggests a strong growth in Asian markets including China, Singapore and Korea as well as emerging SE Asian markets including Malaysia are travelling to the Scenic Rim for both day trips and overnight stays.

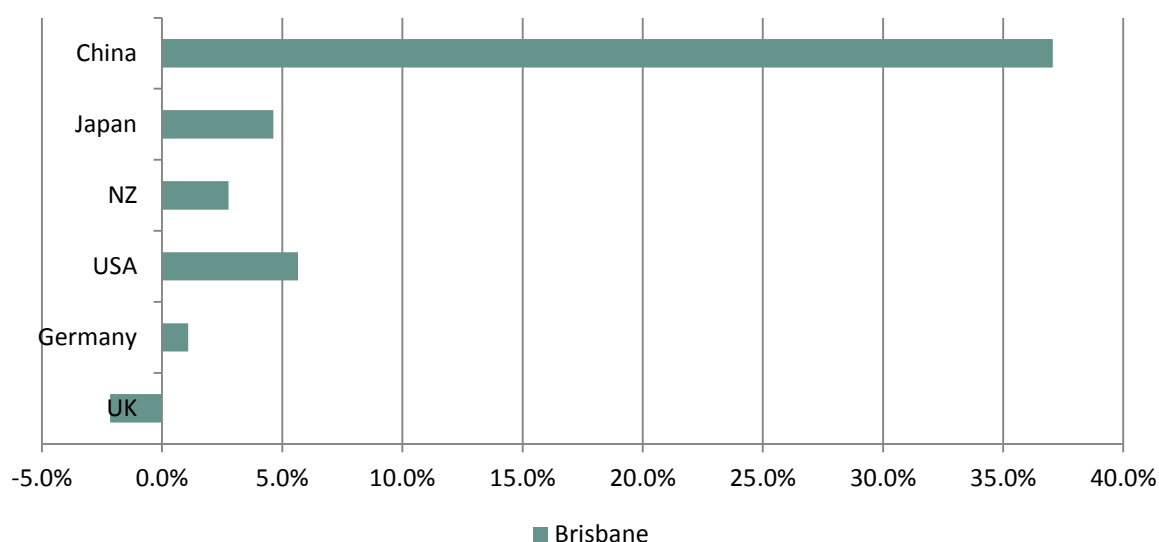
Figure 5 shows the relative importance of the New Zealand market and the China market to Greater Brisbane, with most staying in the Brisbane CBD and close to the Brisbane Airport. The Scenic Rim is currently more likely to attract overnight stays from the UK, German and USA international markets, with growth potential from Asia. China has been Brisbane's strongest growth market since 2010 with European visitors having little change or even decreasing since 2010.

Figure 5: Brisbane Top 5 International Visitor Origins, 2016



In terms of growth from international visitor markets, Figure 6 shows that the Brisbane region has had its strongest growth from China with traditional markets such as the UK and Germany either declining or showing little growth. The opportunity for the Scenic Rim is to work more closely with both Brisbane and the Gold Coast to grow its share of the international overnight market who are more likely to travel mid-week and off-peak when the destination has capacity and can better manage peak demand.

Figure 6: Brisbane Average % Change per annum International Visitor Origins (2010-2016)

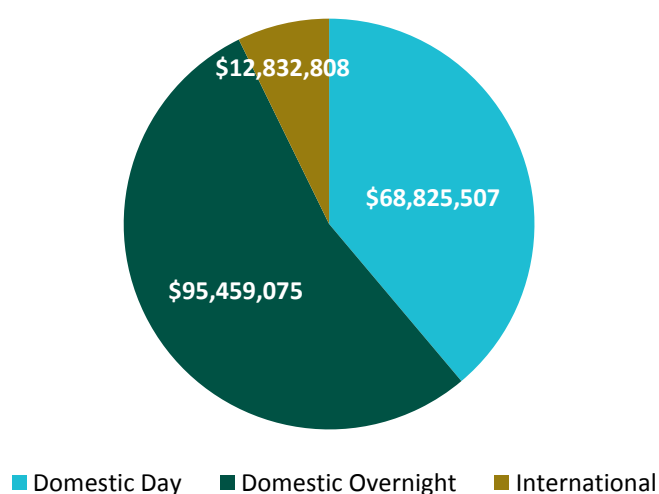


## Expenditure

On average, domestic day visitors to the Scenic Rim spent \$61 on their trip, while international visitors spent \$56 per night, and domestic overnight visitors spent \$137 per night, contributing a total of \$177 million in visitor expenditure to the region (3% of all visitor expenditure in the Brisbane Region).

- While domestic day visitors make up 80% of all visitation to Scenic Rim, they contribute approximately 39% of visitor expenditure
- International visitors make up 1% of all visitors to the region, but contribute 7% of expenditure
- Domestic overnight visitors contribute the largest proportion of overall visitor expenditure (54%)

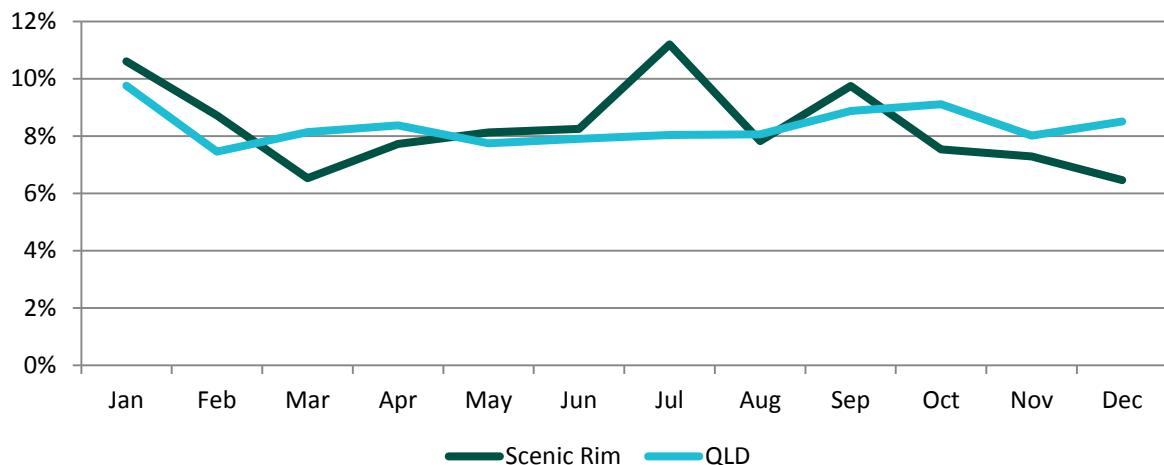
Figure 7: Visitor Expenditure, 2016



## Seasonality

Domestic overnight and day visitation to the Scenic Rim generally peaks in July, with key off-peak months being December and March (See Figure 8), reflecting seasonal weather patterns and key events such as Eat Local Week (held in July). The figure below does not include international overnight and day seasonality trends.

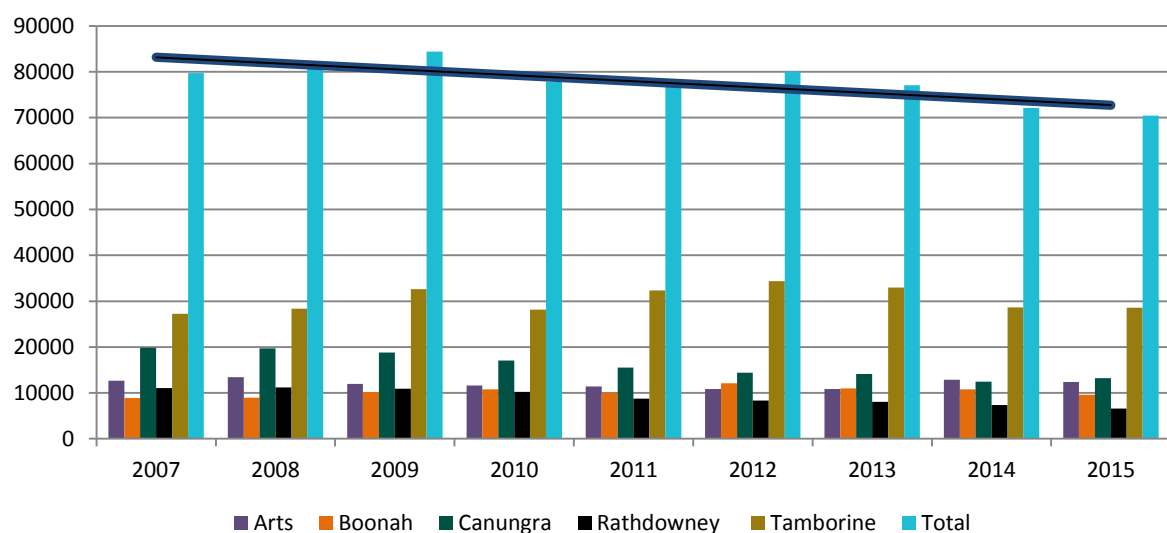
Figure 8: Domestic Visitor Seasonality Trends of Scenic Rim and QLD, 2016



## Visitor Information Centres

In addition to the research conducted by Tourism Research Australia, Visitor Information Centres (VICs) also collect data on visitors to the individual centres. Scenic Rim Regional Council operates five VICs – Beaudesert Community Arts and Information Centre, Boonah VIC, Canungra VIC, Rathdowney Information Centre and Historical Museum and Tamborine Mountain VIC. Visitation to these VICs overall has dropped slightly, with visitation decreasing by 1%p.a. since 2007.

Figure 9: VICs Visitation, 2007 - 2015

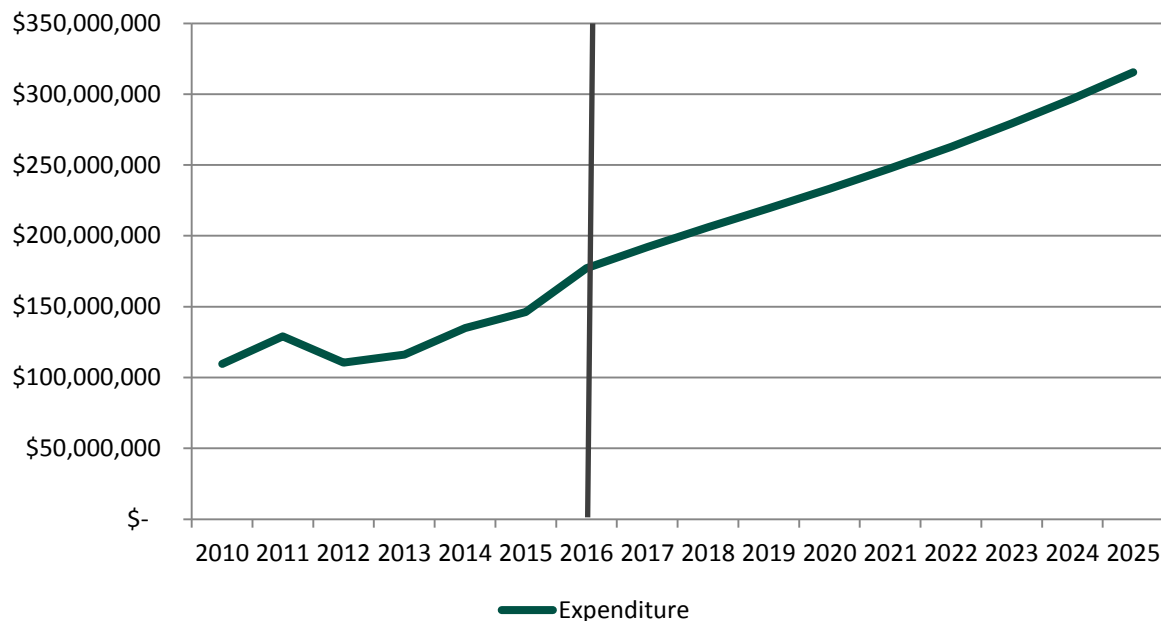


## 2.4 Future Visitor Market Growth

Growing at an estimated 4.1% per annum, the Scenic Rim is predicted to reach over 1.6 million visitors with a total tourism expenditure of over \$247 million by 2021.

These estimates are based on the latest growth rate for domestic and international tourism by Tourism Research Australia's Tourism Forecasting Committee, drawing on a range of factors that include the health of the source market economy, access and competitive forces. These however are only estimates, and should be treated as conservative forecast estimates or as 'natural growth'.

Figure 10: Visitor Expenditure Projections



Reaching these forecast projections would mean that in 2021, the Scenic Rim would see:



An additional **275,000 visitors**



An additional **162,000 visitor nights**



An additional **\$70.5 million** in total tourism expenditure



## 2.5 Destination SWOT Analysis

<p><b>Strengths:</b></p> <ul style="list-style-type: none"> <li>• The Scenic Rim has a range of natural and environmental assets, small town character and cultural elements that contribute to a unique hinterland destination experience.</li> <li>• The location of the Scenic Rim relative to the Gold Coast and Brisbane provide good access to important intrastate and interstate markets.</li> <li>• Strong opportunities for food and wine, nature-based and ecotourism experiences, arts and cultural heritage tourism and recreational aviation are emerging.</li> <li>• Community events are a unique expression of the Scenic Rim community and represent an opportunity to grow community-based tourism.</li> <li>• Scenic Rim branding initiatives have effectively positioned the Scenic Rim as a key hinterland destination within the broader Brisbane region.</li> <li>• There is a relatively high level of participation in the LTOs and active engagement by many members.</li> <li>• Regional stakeholders are positive and supportive of developing tourism in the Scenic Rim.</li> </ul>	<p><b>Weaknesses:</b></p> <ul style="list-style-type: none"> <li>• Tourism visitation is characterised by weekend peaks and very low visitation / accommodation occupancies mid-week.</li> <li>• Dispersal of visitors outside key tourist activity centres is limited.</li> <li>• Basic infrastructure needs to be better aligned with tourism objectives.</li> <li>• Visitors have misconceptions about the size of the region, things to do, and feasible travel routes.</li> <li>• Public transport in the region is lacking. Some small but high yield visitors find it difficult to get around.</li> <li>• There is a lack of good quality and effective signage – place signs, directional signs and interpretative signs.</li> <li>• Mobile phone and GPS coverage is very poor in areas. Visitors are increasingly dependent upon mobiles and GPS.</li> <li>• The Scenic Rim is relatively new as a regional brand. Market awareness of the ‘Scenic Rim’ in the Brisbane region alone has been very limited, and beyond this immediate region almost negligible.</li> <li>• Only some industry stakeholders are aware of the ideas underpinning the branding strategy and the time and financial resources it takes to establish and retain market awareness.</li> <li>• Levels of industry support for branding and other marketing activities have been varied, probably due to a combination of factors including time pressures and lack of consultation opportunities. Financial sustainability of small businesses needs to be secured before many in the industry can think about new initiatives such as creative product packaging, new distribution channels and partnering.</li> <li>• Awareness of the Scenic Rim and what the brand stands for</li> </ul>
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<p><b>Opportunities:</b></p> <ul style="list-style-type: none"> <li>• Dispersal of visitors away from key tourist activity centres can reduce the concentration of negative social and environmental impacts and distribute the benefits of tourism more widely.</li> <li>• Innovative product packaging based on unique natural assets, landscape and small town character is possible.</li> <li>• Industry is generally active, passionate and interested in exploring new opportunities.</li> <li>• Signage (place signs, directional signs and interpretive signs) would help to disperse visitors and convey the uniqueness of the area.</li> <li>• There are opportunities to add value to existing events, building capacity to manage, fund and promote events.</li> <li>• VICs can be used more effectively to facilitate industry communication, product awareness and networking.</li> <li>• New tourism businesses also represent opportunities for the community, e.g. new restaurants, services should be patronised by locals too.</li> <li>• Secure a number of iconic events to create a 'year-round' events program</li> </ul>	<p><b>Threats:</b></p> <ul style="list-style-type: none"> <li>• Development Assessment processes are complex and have the potential to impede investment and business attraction.</li> <li>• Industry needs to take advantage of branding initiatives; otherwise conversion of destination product awareness into offers and sales will be limited. This could potentially splinter support for current branding initiatives.</li> <li>• The effectiveness of the branding initiatives need to be valued over time on a number of measures to ensure ongoing support. Evaluating this effectiveness requires a co-ordinated approach across industry, LTOs and Council to collect data and other forms of evidence.</li> <li>• Congestion on Tamborine Mountain is a threat to the visitor experience; pedestrian safety is of concern. Congestion leads to community resentment of tourism.</li> </ul>
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## 3. DESTINATION DIRECTION

### 3.1 Vision & Mission

#### ***Vision: Grow the value of tourism to \$300 million by 2021***

This target is set based on doubling the value of tourism between 2015/16 and 2021.

In order to achieve the vision of reaching \$300 million in visitor expenditure in 2021, the Scenic Rim would need to attract an additional \$52.4 million in visitor expenditure in 2021 above the predicted Tourism Forecasting Committee (TFC) estimates. Achieving this 'stretch' forecast will therefore require new action which disrupts and grows the market beyond the levels that normal (TFC) 'business as usual' anticipated market growth would deliver.

The Scenic Rim is ideally positioned to grow both in volume and in value of tourism over the next five years. With a strong commitment to environmental and social sustainability, the Tourism Strategy has a clear mission to:

#### ***Mission: 'Develop vibrant and sustainable tourism and genuine visitor experiences that celebrate the region's unique and world-class natural assets, rural and small town character and community values.'***

In order to achieve this mission, the following strategy objectives have been outlined:

- Positioning of the Scenic Rim based on small town/rural country charm and natural environment;
- The need for the type and scale of tourism to reflect local character and community values;
- Emphasis on action to maximise community benefit;
- Arrangement of facilitation role for Council to help pull together a diverse visitor economy;
- More collaboration to aid implementation of the strategy;
- Improve connectivity between businesses and increase participation in tourism activities;
- Prioritise product and industry development for the region; and
- Further emphasis on storytelling.

The aspiration for the region is to deliver this mission and achieve a new vision of above average growth in visitor expenditure.



## 3.2 Destination Goals

The stretch target and vision of growing the value of tourism to \$300 million by 2021 relies on the following goals being achieved:



Goal 1: Increasing the **value** of tourism



Goal 2: Increasing **market share** in key segments



Goal 3: Growing **off-peak** visitation



Goal 4: **Dispersing** visitors across the region



## Goal 1: Increase the Value of Tourism

The vision of doubling the value of tourism by 2021 is not only based on increasing the number of visitors and nights to the region, but also increasing the value of tourism through higher spend from visitors. The goals for visitor spend per night for domestic day, overnight and international visitors follow Tourism Forecasting Committee's (TFC) forecasted growth rates<sup>1</sup>.

Following TFC's visitor spend growth rates, in 2021 domestic day visitors to the Scenic Rim would spend an average of \$76 per trip (up from \$64 in 2015-16), domestic overnight visitors would spend on average \$166 per night (up from \$146 in 2015-16), and international visitors would spend on average \$96 per night (up from \$70 in 2015-16) (See Table 2).

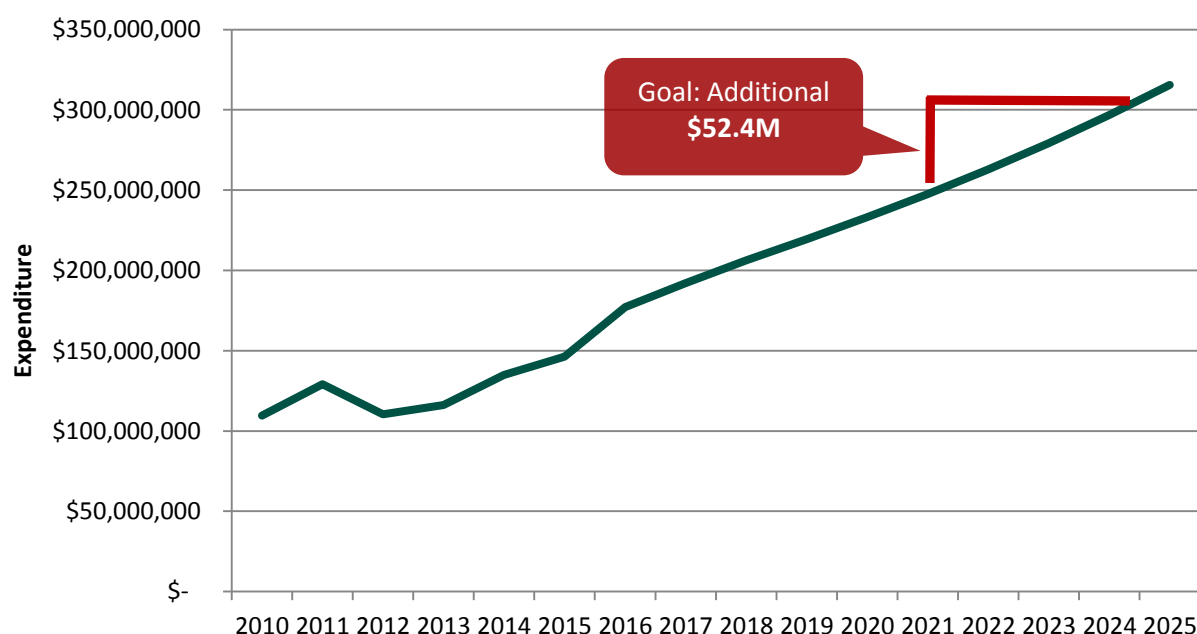
Table 2: Increasing Visitor Spend Goals

Visitor Spend	2015-2016		2021	
	Spend/Night	Expenditure	Spend/Night	Expenditure
Domestic Day	\$64	\$58 million	\$76	\$119 million
Domestic Overnight	\$146	\$81 million	\$166	\$153 million
International	\$70	\$11 million	\$96	\$28 million
<b>TOTAL</b>		<b>\$150 million</b>		<b>\$300 million<sup>2</sup></b>



**Key Performance Indicator #1: Grow the spend per night by an average of 4.6% per annum across all visitor markets to 2021, to generate an extra \$52 million per annum based on the higher spend and market share.**

Figure 11: Scenic Rim TFC Forecast



<sup>1</sup> TFC forecasts are estimated national growth rates

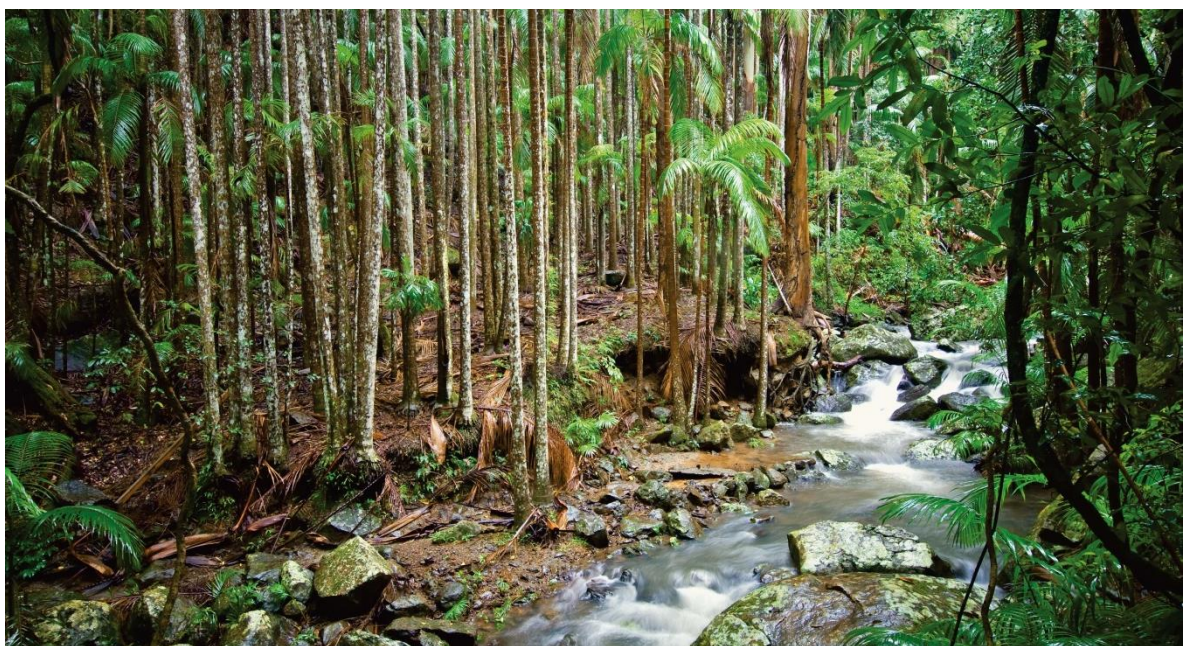
<sup>2</sup> Includes growth in visitors & nights as well as spend

## Catalyst Project #1: Increase the funds for marketing and event development from a new funding model.

Identify the most appropriate funding mechanism to increase the marketing budget by at least \$200,000 to be matched with industry and partner funds to create campaigns that generate in excess of \$1 million in media value (combined media and marketing value).

### Goal 1: Supporting Actions

- Undertake a **Tourism Investment Prospectus** for accommodation, adventure infrastructure and event locations. The investment prospectus should highlight an interest in adventure-based events and activities (ziplines, mountain bike trails, iconic walks and cycle trails)
- **Target growth from emerging higher value segments** including Business Tourism (Conferences and Events) through appropriate marketing support and investment in conference spaces and value-adding complementary activities (e.g. team building, connect with nature)
- Develop an in-house support program to ensure Scenic Rim operators are **China-ready** in terms of customer service, cultural awareness, signs and communications, food and retail offerings, as well as specific produce and itinerary development, to access a greater share of this important growth market for South East Queensland
- Mentor local businesses to become more **active in the international market** through specialised marketing aimed at key Asian and long-haul markets
- Implement the tourism specific recommendations of the **Vibrant and Active Towns**. These recommendations include pathways connecting the villages, revamping of town centres (as destination features), and developing eco-rated community facilities that appeal to visitors such as a major art gallery on Tamborine Mountain.
- Encourage Scenic Rim businesses to add value to their experience to increase spend per day through **business support programs**
- Prepare a **Regional Events Plan** to guide the Events Program and include KPIs for the management of the program and funds to support an Events Program and marketing to drive off-peak visitation, nights and spend



## Goal 2: Increase Market Share of Key Segments

In order to reach the desired target of \$300 million of visitor expenditure into the region in 2021 (\$52.4 million above TFC forecasts), the region will not only need to increase average visitor spend (Goal 1), but also target the following markets by increasing their market share of visitors and nights (and thus spend) in:

- Nature-based/Ecotourism
- Agri-tourism/Culinary
- Cultural Tourism
- Regional Events

Table 3: Increasing Visitor Spend Goals

Primary Target Markets	Current (2016)	2021 TFC Forecasts	Current Share of Visitor Market	Shift Share Goal	2021 Additional Value
Nature-based/ Ecotourism	\$27.5 million	\$39.4 million	19%	0.5%	\$6.2 million
Agri-tourism/ Culinary	\$5.2 million	\$7.9 million	26.7%	0.5%	\$24.9 million
Cultural Tourism	\$9.0 million	\$14.1 million	6.2%	0.5%	\$18.2 million
Regional Events	\$3.0 million	\$5.1 million	4%	0.5%	\$9.2million
				<b>TOTAL</b>	<b>\$58.5 million</b>



**Key Performance Indicator #2: Increase our market share of visitors travelling within a two-hour radius (excluding the coast) for agri-tourism, nature-based tourism, cultural tourism and regional events by 0.5% above forecast growth.**

### Primary Target Markets<sup>3</sup>

#### ***Nature-based/Ecotourism Market***

No longer a niche market, ecotourism is now one of Queensland's greatest competitive advantages. Seeking more active and adventurous experiences, and more richer and connected moments within nature, visitors are showing more interest in nature-based activities in Australia compared with the more traditional protected area activities such as walking and gardens. Currently worth approximately \$27.5 million in visitor expenditure, if Scenic Rim could increase its share of the nature-based visitor market by just 0.5% in 2021, the region would see an additional \$6.2 million in expenditure above TFC forecasts.

#### ***Agri-Tourism/Culinary Market***

Whilst Australia's nature and lifestyle are among the key motivating factors for travel, more and more people are discovering its food and wine offering, causing gourmet tourism to grow. Australia's food and wine have become one of its greatest assets, offering a large range and high-quality produce. Research conducted across 15 of Australia's key tourism markets Tourism Australia, shows that 'great food, wine, and local cuisine' is now a major factor in holiday decision making, ranking third (at 38%), ahead of world class beauty and natural environments (at 37%)<sup>4</sup>.

<sup>3</sup> Please Note: All market segments (by activity) have been realigned to avoid overlaps and double counting i.e. one visitor participating in multiple activities

<sup>4</sup> Tourism Australia Food and Wine Factsheet



According to a 2016 survey of over 2,600 Australians by lastminute.com.au, the Scenic Rim ranked 9<sup>th</sup> of Australia's favourite wine regions, offering wine trails including Witches Falls Winery, Cedar Creek Estate and Albert River Wines as well as magnificent views over the Great Dividing Range and accommodation surrounding national parks.

Currently worth approximately \$5.2 million in visitor expenditure, if Scenic Rim could increase its share of the agri-tourism and culinary visitor market by just 0.5% in 2021, the region would see an additional \$24.9 million in expenditure above TFC forecasts.

### ***Cultural Tourism Market***

The cultural visitor market is a broad market which includes built and natural heritage environments, public art, indigenous heritage, arts and cultural venues, as well as exhibitions, displays and shows. Positive trends at regional, state and national levels indicate a strong and long-lasting interest in cultural tourism.

Currently worth approximately \$9.0 million in visitor expenditure, if Scenic Rim could increase its share of the cultural visitor market by just 0.5% in 2021, the region would see an additional \$18.2 million in expenditure above TFC forecasts.

### ***Regional Events Market***

Events play an important role in increasing the appeal and publicity of destinations for new and repeat visitors. Creating an enticing program of events creates specific reasons to visit as well as offers the destination the potential to help tackle seasonality and generate additional tourism in the off-season. Positioning the Scenic Rim as an events destination will not only help to establish a revitalised public image of the region, but also help to develop a proud social fabric within the community. Regional events include sporting events (e.g. Rowing on Wyaralong and adventure racing), weddings and special interest events (e.g. music, arts, etc.).

Currently worth approximately \$3.0 million in visitor expenditure, if Scenic Rim could increase its share of the regional events market by just 0.5% in 2021, the region would see an additional \$9.2 million in expenditure above TFC forecasts.

### ***Overview of Primary Target Markets***

If Scenic Rim were to achieve an increase of 0.5% in market share from the Brisbane region by 2021 in each of the four primary target markets (nature-based, agri-tourism/culinary, cultural and regional event markets), the region is forecasted to receive an additional \$58.5 million in visitor expenditure above TFC growth rates. This would mean that the Scenic Rim region would be likely to meet their vision of reaching \$300 million in visitor expenditure in 2021 (\$52.4 million above TFC) if growth followed TFC natural forecast rates.

### ***Secondary Target Markets***

The secondary target markets are those that have high potential for growth in the region, and have been identified as:

- Visiting Friends and Relatives (VFR)
- Conference & Business Events
- Asian Visitors
- New Zealand Visitors

While not clearly supported in the official visitor trends, a number of markets have significant growth potential and the likelihood of impacting on the type of tourism experienced in the Scenic Rim. Anecdotal evidence from operators and other information sources support the fact that a number of secondary markets have been growing to the region. In particular the growth in weddings and

conferences to precincts such as Tamborine Mountain, the growth of markets from Asia (particularly China) and the emergence of visitors from New Zealand.

### **VFR Market**

As the local resident population grows and the economy improves, the VFR market is becoming an increasingly important market, especially as a main purpose of visit for visitors to the Scenic Rim region.

Scenic Rim's VFR market seen the largest average per annum growth since 2010 (13.4%p.a.) of all main purposes of visit, and there continues to be an opportunity to grow this market as:

*Scenic Rim is predicted to have the second fastest (behind Ipswich) population growth rate in Queensland, with an average annual population change of 3.5% to 2021. While all other LGAs in Queensland are expected to see an increase in median age, Scenic Rim's median age is expected to fall from 40 to 28 years due to an influx of young families to new residential developments.<sup>5</sup>*

Currently worth approximately \$49 million in visitor expenditure, if Scenic Rim could increase its share of the VFR market by just 0.5% in 2021, the region would see an additional \$8.5 million in expenditure above TFC forecasts.

### **Conferences, Weddings & Business Events Market**

The Scenic Rim is attracting a growing number of conferences, weddings and business events. The opportunity exists to target high spend, high average length of stay and growing business and special event visitor market by boosting Scenic Rim's profile as a conference, events and meeting destination through a broader range of facilities and compelling leisure experiences are fundamental in growing this market.

In the absence of reliable data from the national and international visitors surveys the strategy needs to rely on evidence from industry providers. Through the Tamborine Mountain Chamber of Commerce a survey of wedding providers was undertaken that showed as many as 1,200 weddings are held per annum on Tamborine Mountain alone, with an average of 50 wedding guests. Expanding that across the Scenic Rim, the Weddings Market could be up to 70,000 visitors per annum, based on current spend per person that could be as much as \$19M in visitor expenditure (excluding the cost of the event costs such as fit-out). Further visitation and expenditure growth is possible through the business events, conference and special interest markets such as education.

The business events and conference market is also an important 'mid-week' market with potential to grow. While the Scenic Rim's conference, weddings and business event market cannot be directly compared with the rest of Greater Brisbane, however there are a number of very successful venues that give the region a competitive advantage. Building on the existing venues, if the region could increase its share by 1% in 2021, an additional \$2 million in additional expenditure could be generated by visitors in region above TFC forecasts.

### **Asian Market**

Asia is the fastest growing visitor origin region in the world, and as it is positioned on Australia's doorstep, is exceptionally important to Australia. Positioned between Brisbane City and the Gold Coast (both with direct access to Asia), Scenic Rim has a significant opportunity to target Asian visitors from these regions and increase their market share.

Asian visitors currently make up approximately 41% of all international visitors to Brisbane, with China, India and Hong Kong having the highest percentage growth per annum of all international country origins since 2010 (37%p.a., 16%p.a. and 14.5%p.a. respectively). The Gold Coast attracts an even higher

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<sup>5</sup> Queensland Government population projects to 2031, Local Government Areas, 2011 edition, OESR

percentage of Asian visitors (54%), with visitors from China, India, Hong Kong and Singapore growing an average of 27%, 21%, 10.5% and 10% per annum respectively since 2010.

With the significance of the Asian market to Brisbane and the Gold Coast in both market size and growth, Scenic Rim has an opportunity to further target this market through marketing, product opportunities and working with Brisbane Marketing and the Gold Coast Tourism to develop tailored itineraries.

Currently worth approximately \$230,000 in visitor expenditure, if Scenic Rim could increase its share of the Asian market by just 0.6% (total of 1% share) in 2021, the region would see an additional \$1.1 million in expenditure above TFC forecasts.

### ***New Zealand Market***

The New Zealand market is Australia's largest inbound market for visitor arrivals, fourth largest market for total visitor expenditure, and the third largest market for visitor nights<sup>6</sup>. With direct aviation routes between New Zealand and Brisbane and the Gold Coast, Scenic Rim has the potential to increase its market share of visitors from New Zealand to 2021. Approximately 43% of international visitors to Brisbane and 20% of international visitors to the Gold Coast are from New Zealand, with New Zealand visitors growing by an average of 2.8%p.a. since 2010, there is potential for Scenic Rim to increase their market share of New Zealand visitors.

Currently worth almost \$400,000 in visitor expenditure, if Scenic Rim could increase its share of the New Zealand market by 0.8% in 2021, the region would see an additional \$340,000 in expenditure above TFC forecasts.

*Table 4: Overview of Primary and Secondary Target Markets*

Markets	Current (2016)	2021 TFC Forecasts	Current Share of Visitor Market	Shift Share Goal	2021 Additional Value <sup>7</sup>
<b>Primary Target Markets</b>					
Nature-based	\$27.5 million	\$39.4 million	19%	0.5%	\$6.2 million
Regional Events	\$3.0 million	\$5.1 million	4%	0.5%	\$9.2 million
Agri-Tourism/Culinary	\$5.2 million	\$7.9 million	26.7%	0.5%	\$24.9 million
Cultural	\$9.0 million	\$14.1 million	6.2%	0.5%	\$18.2 million
				<b>TOTAL</b>	<b>\$58.5 million</b>
<b>Secondary Target Markets</b>					
Conference & Business Events	Not Available	Not Available	Not Available	1.0%	\$2 million
VFR	\$49 million	\$77.8 million	4%	0.5%	\$8.5 million
Asia	\$230,000	\$2 million	0.4%	0.6%	\$1.1 million
New Zealand	\$400,000	\$866,000	1.2%	0.8%	\$343,000

<sup>6</sup> New Zealand Market Profile 2015, Tourism Australia

<sup>7</sup> Please note: As secondary markets overlap with the primary markets (i.e. visitors who come to Scenic Rim by purpose and origin may also participate in activities), their values have been excluded from the overall expenditure goal.



**Catalyst Project #2: Increase marketing efforts in partnership with Brisbane Marketing and Gold Coast Tourism targeting the 200km drive market and emerging fly-drive interstate markets (Sydney and Melbourne).**

**Goal 2 Supporting Actions**

- Develop an **agri-tourism cluster** (see enablers) that develops linkages with the agricultural sector and provides industry mentoring on diversification of agricultural businesses into tourism.
- Leverage the development of **outdoor recreation opportunities** such as those associated with the Wyaralong Dam, rail trails and Boonah airfield; ensure these do not conflict with the nature-based tourism aspirations of the region.
- Provide support services to aid land managers in business and development and educate producers about tourism through **'how-to' guides** to help them diversify into tourism.
- Develop and promote **iconic trails** (food, walking/hiking, horse-riding) to raise the profile of Scenic Rim's nature-based offering.
- Strengthen Scenic Rim's nature-based offering and promotion by **developing iconic experiences** associated with the region's natural beauty.
- Support the development of **new conference facilities** to increase options and pax sizes, opening up opportunities to growth business tourism.
- Encourage investment in **high-end, branded accommodation** to drive growth and spend from high-end markets such as Asia.
- Strengthen the **formal partnership** between the Scenic Rim and both Brisbane Marketing and Gold Coast Tourism.
- Develop a **cluster to target key Asian markets** through collective approach with Brisbane Marketing.
- Support the development of **packages for heritage and cultural attractions** to raise awareness of the experiences available.
- Work with industry associations and education providers to attract visitors from Asia for **study tours and education**. This can be enhanced by the development of a Student Ambassador Program encouraging students to become tourism ambassadors for the region.
- Highlight the region's unique flavour through its **Events Calendar** (in addition to Eat Local Week) to ensure that the position of the region is reinforced and build awareness of the culinary sector.
- Obtain **GI status for the Scenic Rim as an official wine producing region** to improve promotion and increase awareness of the local products, which simultaneously strengthen the region's brand.
- Support existing events extend their reach into emerging markets through industry capacity building and establishment of a **cluster group for events**.

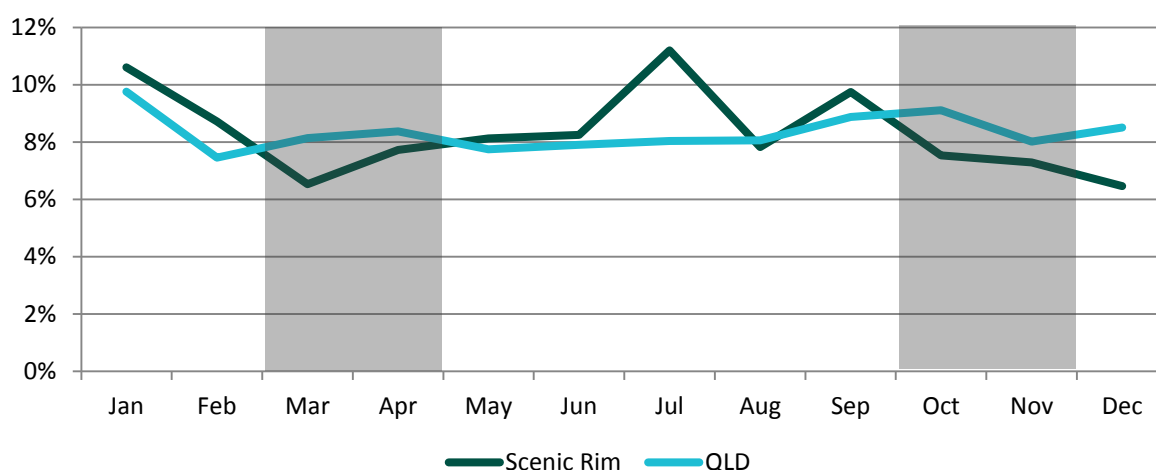
In partnership with the Commonwealth Government, investigate the **feasibility** of establishing a **site masterplan for the Killarney Glen waterhole** to secure future access to this potentially iconic site.

### Goal 3: Dispersal of Seasonal Visitors

A high level of seasonality in visitation is a common characteristic of many destinations, especially when holidays are a large proportion of the visitor market. These peaks and troughs in visitation can have significant impacts on the economy, community and environment, highlighting the need for generating optimum levels of year-round visitation.

Scenic Rim generally follows Queensland seasonality trends, however dips below the Queensland average in March and October (as well as in November and December when visitors generally go to coastal destinations) (See Figure 11).

Figure 11: Visitor Seasonality Trends of Scenic Rim<sup>8</sup> and QLD, 2016



Events are an effective way of drawing in visitors and encouraging overnight stays during off-peak times of the year. The Scenic Rim already boasts an array of events, with the key ones listed below (Table 5):

Table 5: List of Key Events that Impact the Scenic Rim and Month of Occurrence

Key Events that Impact the Scenic Rim	Month
Studios of the Scenic Rim	May
Arts in the Olives	May
Scenic Rim Clydesdale Spectacular	June
Eat Local Week	June/July
Winter Harvest Festival	July
Richie's IGA Boonah Arts Festival	September
Springtime on the Mountain	September
Hinterland Sports Festival	November

There is a significant opportunity to host and support major events during Scenic Rim's key off-peak visitor months (March and October) to encourage diversity in the timing of visitors and lesson the peaks and troughs of visitation to the region.



**Key Performance Indicator #3: Support the development of a year-round events calendar to encourage greater dispersal of seasonal visitors.**

<sup>8</sup> Based on 5 year average due to small sample sizes

**Catalyst Project #3: Maintain and continue to grow a Tourism Events Fund to support the growth and development of events that attract at least 30% of their attendees from outside the region and actively contribute to building the region's brand.**

To fund and support event growth and attraction, it is recommended that Council allocation additional funds to an Events Program and additional marketing. Similar programs have been established in destinations such as the Sunshine Coast, Gold Coast and the Surf Coast.

The Events Program would be overseen by Council managing an external events specialist (under contract), where investment would be guided by a Regional Events Plan that would have established set KPIs for the program and criteria for investment of funds. It is recommended that any funds for marketing be for tourism related events that drive off-peak visitation and overnight stays. In keeping with Scenic Rim's strong commitment to environmental and social sustainability, events funded under the program could be required to meet the International Standard for Sustainable Events, ISO20121 established for the London Olympics and now applied to small, large and major events across the world.

**Goal 3 Supporting Actions:**

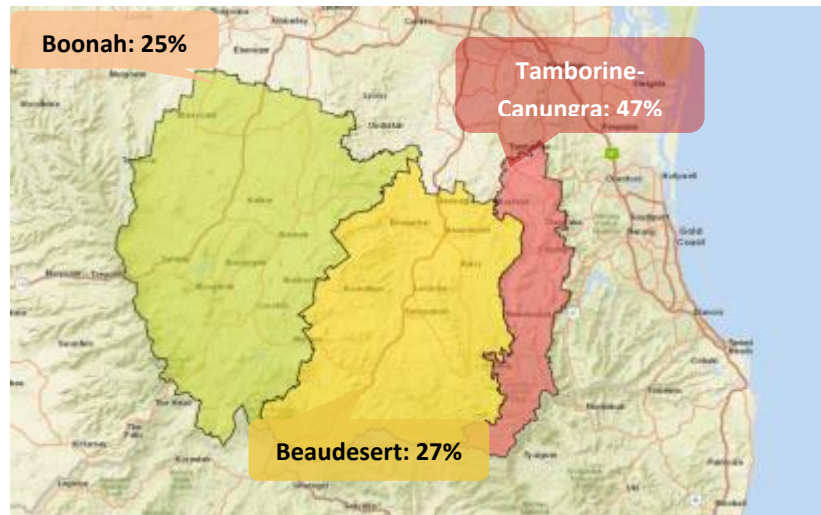
- Leverage the **2018 Commonwealth Games** to showcase local food, aboriginal culture, and nature-based experiences through Commonwealth Games sanctioned events, in the Games village and through influencing the media attention generated by the Games to showcase the Scenic Rim.
- Continue to support and grow the **Eat Local event** as a signature experience for the region.
- Grow the **domestic education market** who travel mid-week and off-peak through the development of curriculum links with key products / attractions.
- Promote the region's existing sporting and cultural facilities for events through a **facilities guide**.
- Invest in **seasonal campaign activity** to encourage visitation during off-peak travel periods
- Identify **three strategic events** with potential to be brand builders, seasonality stretchers and visitor attractions
- Work with Brisbane Marketing and Gold Coast Tourism to promote the region for **conference and business events**
- Create an **online photo library** with royalty free images for industry and events.



## Goal 4: Dispersal of Visitors

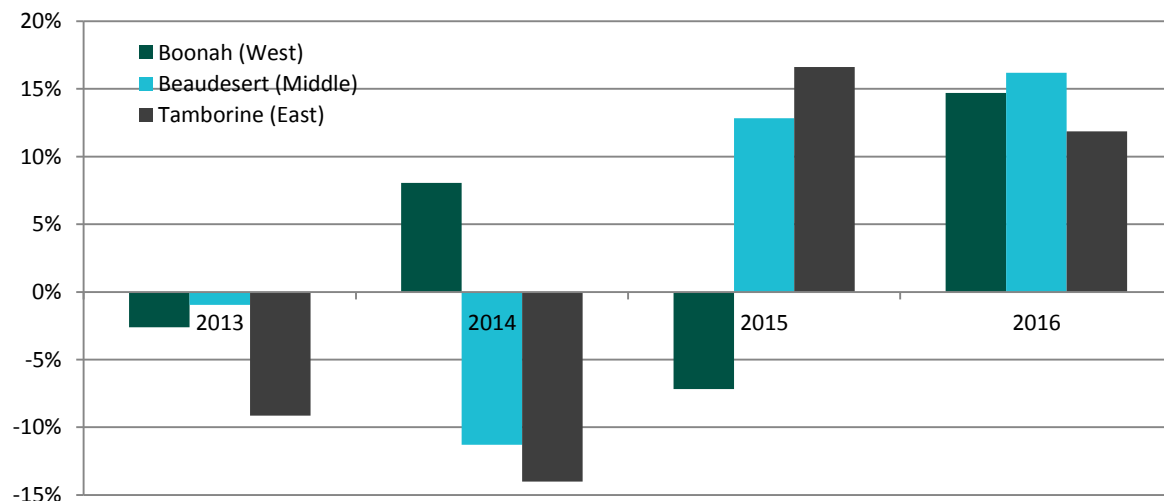
Currently, almost half of Scenic Rim’s visitation occurs towards the eastern part (Tamborine-Cunungra), with the middle and west parts (Beaudesert and Boonah) each receiving approximately a third of visitors (See Figure 12). This geographical disparity in visitation highlights the need for greater dispersal of visitors from the eastern precincts to the western precincts through greater marketing, signage and collaboration.

Figure 12: Proportion of Scenic Rim Visitors by Tourism Precincts, 2016



However, visitation has grown in the west and middle tourism precincts of Scenic Rim, with visitation growing by 15% and 16% in Boonah and Beaudesert respectively, while visitation to the east grew by 12% since 2015 (See Figure 13).

Figure 13: Percent (%) Change of Scenic Rim Visitation by Tourism Precincts<sup>9</sup>



**Key Performance Indicator #4: Collaborate across the region to encourage visitors to disperse around the region supported by targeted marketing, and coordinated pre-trip planning, signage and collateral.**

<sup>9</sup> Based on 3-year rolling averages due to small sample sizes



**Catalyst Project #4: Align the efforts of the three local tourism organisations to create a seamless message pre-trip and en-route.**

**Goal 4 Supporting Actions:**

- Undertake primary research with the LTOs. Chambers of Commerce, Visitor Information Centres and University partners to **estimate peak-demand visitor numbers** and its impact on infrastructure and investment requirements as well as the best approach to marketing for dispersal.
- Prepare an **MOU across the three organisations** (Tamborine Mountain Chamber of Commerce and Industry (TMCCI), Scenic Rim Tourism and Scenic Rim Escapes) to align marketing efforts under a single plan (See A3.2 below).
- Support the implementation of the **Digital Strategy** with a part-time resource within Council to coordinate LTO digital activities, implement agreed strategies and report on achievements
- Work with the LTOs to design an **agreed Digital Marketing program** with **one call to action** (one website) that disperses visitors to the appropriate information (or websites) as agreed by the LTOs.
- Seek partner funding to develop a **mobile application** (or utilise an existing platform) that works both online and offline to **push content** (potentially using iBeacon technology) to passing visitors and those touring in the region.
- Work with industry, LTOs, Chambers of Commerce, Brisbane Marketing and TEQ to design and prepare a **high-quality touring map** that can either be stand-alone or inserted in existing publications to showcase touring itineraries including activities, events, best lookouts and experiences.
- Encourage Chambers of Commerce to work with the LTOs to bring the greatest number of **businesses engaged in the joint campaigns**.
- Prepare a **Tourism Signage Action Plan** with key dates drawing on visitor forecasts and the potential identified for the touring market. This plan would provide guidance on the messaging and pre-trip planning information required to encourage dispersal.
- Revitalisation of the Visitor Information Centres as **‘Visitor Inspiration Centres’** with volunteer training in customer engagement, new interpretation and fit-out to reflect modern information needs as well as creation of a mobile visitor inspiration stand for events.
- Reinvigorate the **Visitor Centre volunteers’ role as storytellers** through a training program, in order to encourage extended stays.
- Work together as communities to identify **alternate routes for travellers**. Consider suitability of purpose in the analysis and prioritise upgrading projects. Ensure that directional signage is adequate and that there are appropriate rest stops.
- Create a **Tourism Planning Policy** that defines desirable uses and activities by precinct.
- Council **asset management plans** should consider how community and recreation assets contribute to destination identity and character. Asset management decisions should incorporate tourism forecasts into infrastructure planning (e.g. carparks).

## 3.3 Enablers of Success

### Lead Enabler: Clusters

Development of industry-led clusters to drive growth in emerging sectors for tourism in the region. The three identified clusters are:

- Adventure tourism
- Agri-tourism
- Asia-ready business
- Events (Weddings, Conferences and Business Events).

These clusters aim to build capability and capacity to attract visitors and investment in these sectors. The keys to success are three-fold:

- The cluster groups are industry-led
- Supported by Council
- Supported by a cluster facilitator to establish 'foundations' leading to prioritisation of infrastructure, events, and skills development programs.

### Accessibility:

Lobbying for strategic road improvements based on the development of a Tourism Priority Roads study including modelling of future use of key natural sites to guide infrastructure investment.

### Icon Attractions:

Develop an adventure tourism infrastructure plan to prioritise and facilitate bringing projects to market.

### Investment Attraction:

Extend the Jobs Jumpstart Program to create a 'Significant Tourism Accommodation Investment' incentive with reduced headworks and Council fees for appropriately sized and located accommodation developments.

**Unity:** Create a single LTO operating model to reduce duplication and overlap and establishment of seamless online marketing and purchase process.

**Tourism Workforce:** Undertake a Tourism Workforce Needs Analysis Survey of local businesses on workforce needs (training, skills and staff) and prepare a Tourism Workforce Plan to guide partnerships with education providers, training partners and employment organisations.

**Public Transport:** Ensure tourism figures (from the visitor survey) are included in plans for public transport in the region.

### Catalyst Project #5: Primary Research Program

Due to the limitations of the sample size and methodology limitations of the secondary data sources used in this report, the Scenic Rim needs to invest in ongoing research to collect primary data. A partnership with a university partner should be established to design, implement and monitor the results of the local research project to monitor visitor numbers, nights, spend, dispersal, awareness, activities and key influencers of travel. Data needs to be collected in localities across the region at various times of the year to provide an accurate sample, and be comparable with other national data sets to allow for benchmarking of results.





## 4. ACTION PLAN

### Destination Development

Action		Responsibility	Timing
A1.1	Undertake primary research with the LTOs. Chambers of Commerce, Visitor Information Centres and University partners to <b>estimate peak-demand visitor numbers</b> and its impact on infrastructure and investment requirements as well as the best approach to marketing for dispersal	SRRC Research Partners LTOs	Short-term
A1.2	Undertake a <b>Tourism Investment Prospectus</b> for accommodation, adventure infrastructure and event locations. The investment prospectus should highlight an interest in adventure-based events, activities (ziplines, mountain bike trails, iconic walks and cycle trails)	SRRC DSD	Short-term
A1.3	Develop an <b>agri-tourism cluster</b> (see enablers) that develops linkages with the agricultural sector and provides industry mentoring on diversification of agricultural businesses into tourism.	Industry SRRC	Short-term
A1.4	Leverage the development of <b>outdoor recreation opportunities</b> such as those associated with the Wyaralong Dam, rail trails and Boonah airfield; ensure these do not conflict with the nature-based tourism aspirations of the region.	Industry SRRC	Short-term
A1.5	Provide support services to aid land managers in business and development and educate producers about tourism through <b>'how-to' guides</b> to help them diversify into tourism.	SRRC	Medium Term
A1.6	Extend the Jobs Jumpstart Program to create a <b>'Significant Tourism Accommodation Investment' incentive</b> with reduced headworks and Council fees for appropriately sized and located accommodation developments.	SRRC	Medium Term
A1.7	Develop and promote <b>iconic trails</b> (food, walking/hiking, horse-riding) to raise the profile of Scenic Rim's nature-based offering.	SRRC Industry	Long Term
A1.8	Strengthen Scenic Rim's nature-based offering and promotion by <b>developing iconic experiences</b> associated with the region's natural beauty.	SRRC Industry	Long Term
A1.9	Support the development of <b>new conference facilities</b> to increase options and pax sizes, opening up opportunities to growth business tourism.	SRRC Industry	Long Term
A1.10	Encourage investment in <b>high-end, branded accommodation</b> to drive growth and spend from high-end markets such as Asia.	SRRC Industry	Long Term



## Destination Marketing

Action		Responsibility	Timing
A2.1	<p>Identify the most appropriate funding mechanism to <b>increase the marketing budget</b> by at least \$200,000 to be matched with industry and partner funds to create campaigns that generate in excess of \$1 million in media value (combined media and marketing value).</p> <ul style="list-style-type: none"> <li>• <b>Consolidate Scenic Rim branding</b>, giving it depth and substance, and strengthening market awareness</li> <li>• Invest in <b>seasonal campaign activity</b> to encourage visitation during off-peak travel periods</li> <li>• Create an <b>online photo library</b> with royalty free images for industry.</li> </ul>	SRRC	<p>Immediate</p> <p>Short Term</p> <p>Medium Term</p>
A2.2	Increase marketing efforts in <b>partnership with Brisbane Marketing and Gold Coast Tourism</b> targeting the 200km drive market and emerging fly-drive interstate markets (Sydney and Melbourne).	SRRC	Immediate
A2.3	Strengthen the <b>formal partnership</b> between the Scenic Rim and both Brisbane Marketing and Gold Coast Tourism	SRRC BM / GCT	Short Term
A2.4	Target growth from emerging <b>higher value segments</b> including Business Tourism (Conferences and Events)	SRRC BM / GCT	Medium Term
A2.5	<p>Maintain and continue to grow a <b>Tourism Events Fund</b> to support the growth and development of events that attract at least 30% of their attendees from outside the region and actively contribute to building the region's brand:</p> <ul style="list-style-type: none"> <li>• Prepare a <b>Regional Events Plan</b> to guide the Events Program and include KPIs for the management of the program and funds invested</li> <li>• Highlight the region's unique flavour through its <b>Events Calendar</b> (in addition to Eat Local Week) to ensure that the position of the region is reinforced and build awareness of the culinary sector</li> <li>• Continue to support and grow the <b>Eat Local event</b> as a signature experience for the region.</li> <li>• Identify <b>three strategic events</b> with potential to be brand builders, seasonality stretchers and visitor attractions</li> <li>• Promote the region's existing sporting and cultural facilities for events through a <b>facilities guide</b>.</li> <li>• Work with Brisbane Marketing and Gold Coast Tourism to promote the region for <b>conference and business events</b></li> <li>• Support existing events extend their reach into emerging markets through industry capacity building and establishment of a <b>cluster group for events</b>.</li> </ul>	SRRC	<p>Short Term</p> <p>Short Term</p> <p>Short Term</p> <p>Medium Term</p> <p>Medium Term</p> <p>Long Term</p> <p>Long Term</p>
A2.6	Leverage the <b>2018 Commonwealth Games</b> to showcase local food, aboriginal culture, and nature-based experiences through Commonwealth Games sanctioned events, in the Games village and through influencing the media attention generated by the Games to showcase the Scenic Rim.	Industry SRRC	Short Term
A2.7	Develop a <b>cluster to target key Asian markets</b> through collective approach with Brisbane Marketing	Industry SRRC	Short Term
A2.8	Support the development of <b>packages for heritage and cultural attractions</b> to raise awareness of the experiences available	SRRC	Medium Term
A2.9	<p>Work with industry associations and education providers to:</p> <ul style="list-style-type: none"> <li>• Attract visitors from Asia for <b>study tours and education</b>. This can be enhanced by the development of a Student Ambassador Program encouraging students to become tourism ambassadors for the region</li> <li>• Grow the <b>domestic education market</b> who travel mid-week and off-peak through the development of curriculum links with key products / attractions.</li> </ul>	SRRC	<p>Medium Term</p> <p>Long Term</p>

## Destination Management

Action		Responsibility	Timing
A3.1	<p>Align the efforts of the three local tourism organisations to create a seamless message pre-trip and en-route:</p> <ul style="list-style-type: none"> <li>• Prepare an <b>MOU across the three organisations</b> (TMCCI, Scenic Rim Tourism and Scenic Rim Escapes) to align marketing efforts.</li> <li>• Prepare a <b>digital marketing strategy</b> for the Scenic Rim to align activities of the three organisations.</li> <li>• Support the implementation of the Digital Strategy with a <b>part-time resource within Council to coordinate</b> LTO digital activities, implement agreed strategies and report on achievements</li> <li>• Work with the LTOs to design an <b>agreed Digital Marketing program</b> with <b>one call to action</b> (one website) that disperses visitors to the appropriate information (or websites) as agreed by the LTOs.</li> <li>• Seek partner funding to develop a <b>mobile application</b> (or utilise an existing platform) that works both online and offline to <b>push content</b> (potentially using iBeacon technology) to passing visitors and those touring in the region.</li> <li>• Work with industry, LTOs, Chambers of Commerce, Brisbane Marketing and TEQ to design and prepare a <b>high-quality touring map</b> that can either be stand-alone or inserted in existing publications to showcase touring itineraries including activities, events, best lookouts and experiences.</li> <li>• Encourage Chambers of Commerce to work with the LTOs to bring the greatest number of <b>businesses engaged in the joint campaigns</b>.</li> </ul>	LTOs TAC SRRC	Immediate  Short Term  Medium Term
A3.2	Develop an in-house support program to ensure Scenic Rim operators are <b>China-ready</b> in terms of customer service, cultural awareness, signs and communications, food and retail offerings, as well as specific produce and itinerary development, to access a greater share of this important growth market for South East Queensland.	SRRC	Short Term
A3.3	<b>Mentor local businesses</b> to become more active in the international market through specialised marketing aimed at Asian markets	SRRC	Short Term
A3.4	<p>Implement the tourism specific recommendations of the <b>Vibrant and Active Towns</b>. These recommendations include pathways connecting the villages, revamping of town centres (as destination features), and developing eco-rated community facilities that appeal to visitors such as a major art gallery on Tamborine Mountain.</p> <ul style="list-style-type: none"> <li>• Prepare a <b>Tourism Signage Action Plan</b> with key dates drawing on visitor forecasts and trends of the drive market. This plan would provide guidance on the messaging and pre-trip planning information required to encourage dispersal.</li> <li>• Revitalisation of the Visitor Information Centres as '<b>Visitor Inspiration Centres</b>' with volunteer training in customer engagement, new interpretation and fit-out to reflect modern information needs as well as creation of a mobile visitor inspiration stand for events.</li> <li>• Reinvigorate the <b>Visitor Centre volunteers' role as storytellers</b> through a training program, in order to encourage extended stays.</li> <li>• Work together with communities to identify <b>alternate routes for travellers</b>. Consider suitability of purpose in the analysis and prioritise upgrading projects. Ensure that directional signage is adequate and that there are appropriate rest stops.</li> </ul>	SRRC Chambers of Commerce	Short Term  Medium Term  Medium Term  Long Term
A3.5	Encourage Scenic Rim businesses to add value to their experience to increase spend per day through <b>business support programs</b> .	SRRC TEQ	Short Term
A3.6	Obtain <b>GI status for the Scenic Rim as an official wine producing region</b> to	SRRC	Medium Term

	improve promotion and increase awareness of the local products, which simultaneously strengthen the region's brand.		
A3.7	In partnership with the Commonwealth Government, investigate the <b>feasibility</b> of establishing a <b>site masterplan for the Killarney Glen waterhole</b> to secure future access to this potentially iconic site.	SRRC Commonwealth	Long Term
A3.8	Create a <b>Tourism Planning Policy</b> that defines desirable uses and activities by precinct.	SRRC	Long Term
A3.9	Lobbying for <b>strategic road improvements</b> based on the development of a Tourism Priority Roads study including modelling of future use of key natural sites to guide infrastructure investment	SRRC	Long Term
A3.10	Develop an <b>adventure tourism infrastructure plan</b> to prioritise projects	SRRC	Long Term
A3.11	Council <b>asset management plans</b> should consider how community and recreation assets contribute to destination identity and character. Asset management decisions should incorporate tourism forecasts into infrastructure planning (e.g. carpark)	SRRC	Long Term







## 5. KEY PERFORMANCE INDICATORS

The mission of the Scenic Rim Tourism Strategy is to achieve vibrant and sustainable tourism and genuine visitor experiences that celebrate the region's unique and world-class natural assets, rural and small town character and community values, while also achieving the vision of reaching \$300 million in tourism value by 2021.



Goal 1: Grow the **spend per night** of visitors **by 2.5% per annum** to 2021 to generate an extra \$54 million per annum based on the higher spend and market share;



Goal 2: **Increase our market share** of visitors travelling within a 2-hour radius (excluding the coast) for agritourism, nature-based tourism and cultural tourism by **0.5% above forecast growth**;



Goal 3: Support the development of a **year-round events calendar** to encourage **greater dispersal of seasonal visitors**; and



Goal 4: Collaborate across the region to encourage visitors to **disperse around the region** supposed by a targeted marketing, and coordinated pre-trip planning, signage and collateral.





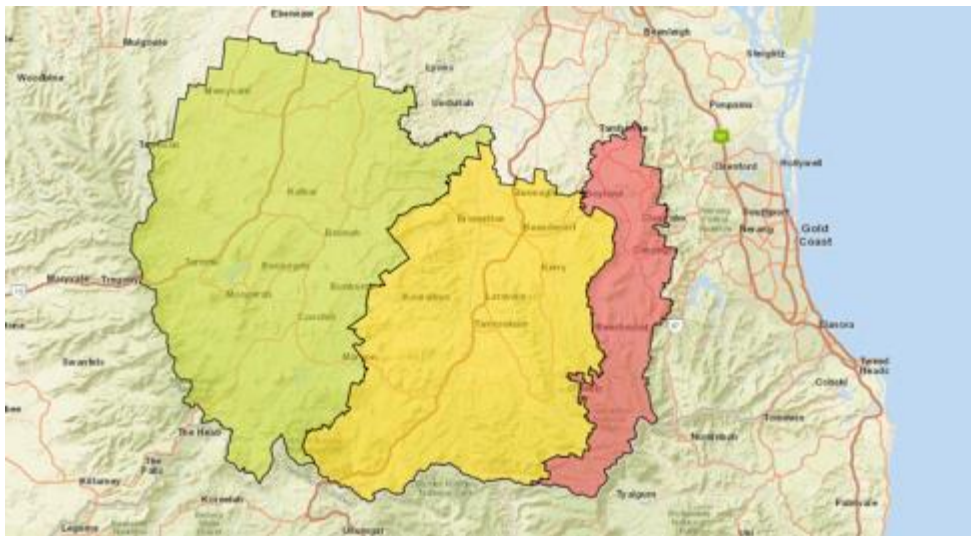
## 6. APPENDICIES

### 6.1 Appendix A: Scenic Rim Tourism Profile

The following section provides an overview of the latest available key visitor trends in the region, sourced from the National and International Visitor Survey data (for the year ending March 2016) from Tourism Research Australia.

For the purposes of this Paper, visitation data and trends have been derived for the Scenic Rim Regional Council area, which includes the Statistical Areas (level 2) of Boonah, Tamborine-Canungra and Beaudesert (See Figure A).

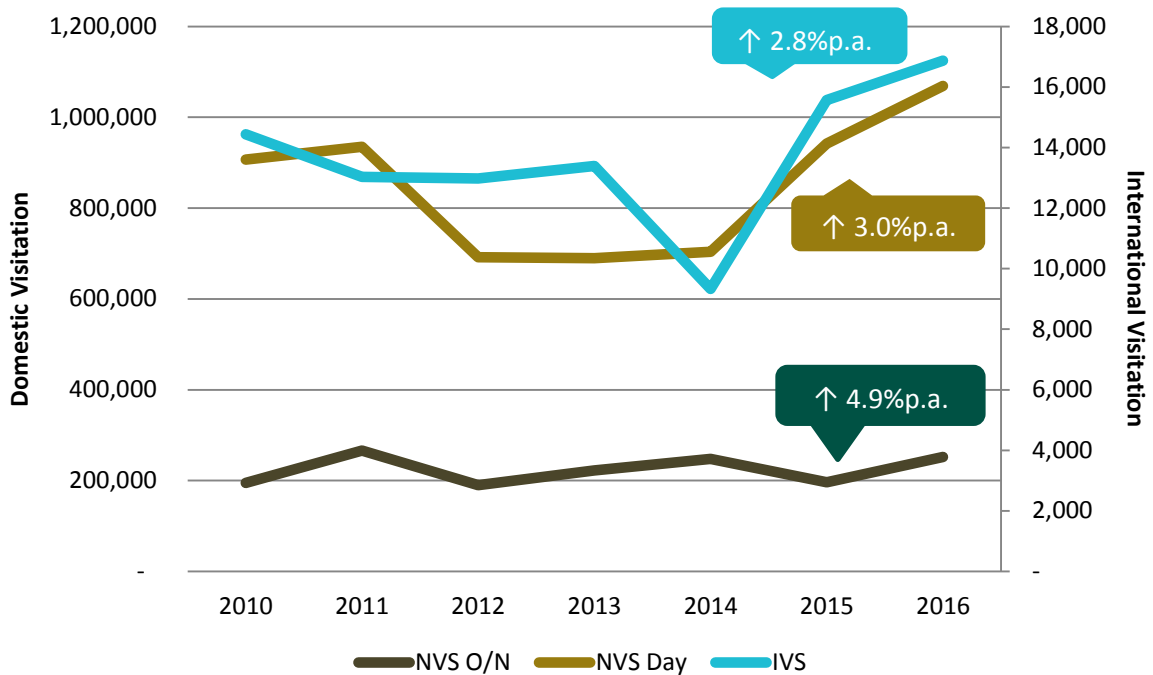
*Figure A: Tourism Research Australia Statistical Areas Level 2 for the Scenic Rim Region (left to right – Boonah, Beaudesert and Tamborine-Canungra)*



#### Visitation Growth and Market Share:

In 2016, the Scenic Rim received approximately 1.3 million visitors, of which 80% were domestic day visitors, 18.8% were domestic overnight visitors and 1.3% were international visitors. These domestic day (NVS Day) visitors have grown by an average of 3.0% per annum (p.a.) since 2010, while domestic overnight visitors (NVS O/N) and international (IVS) visitors have grown by an average of 4.9% p.a. and 2.8% p.a. since 2010 respectively (See Figure B).

Figure B: Visitation to the Scenic Rim, 2010-2016



### Visitor Nights:

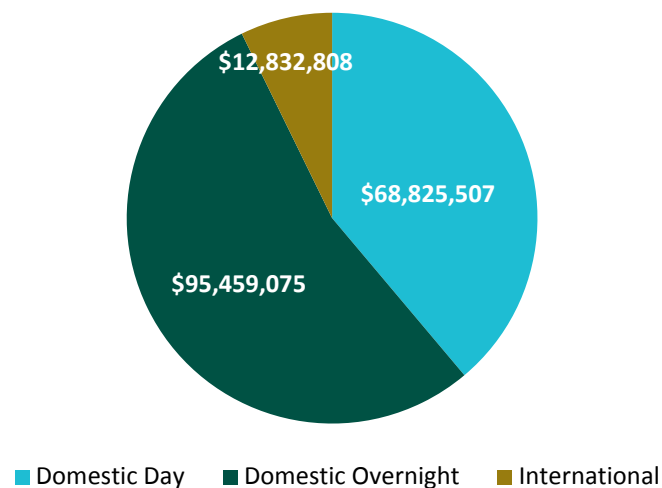
Visitors spent over 836,000 nights in the region in 2016, growing by an average of 7.7%p.a. since 2010. Although international visitors comprise 1.3% of the region's visitor market, they contribute 29.1% of visitor nights, and stay on average for 10.8 nights in region, compared to domestic visitors who spend an average of 2.6 nights.

### Expenditure:

On average, domestic day visitors to the Scenic Rim spent \$61 on their trip, while international visitors spent \$56 per night, and domestic overnight visitors spent \$137 per night, contributing a total of \$177 million in visitor expenditure to the region (3% of all visitor expenditure in the Brisbane Region). While domestic day visitors make up 80% of all visitation to Scenic Rim, they contribute approximately 39% of visitor expenditure due to their comparatively low spend, and while international visitors make up 1% of all visitors to the region, they contribute 7% because of their high average length of stay. Domestic overnight visitors contribute the most to overall visitor expenditure (54%) because of their high spend per nights over shorter time periods.



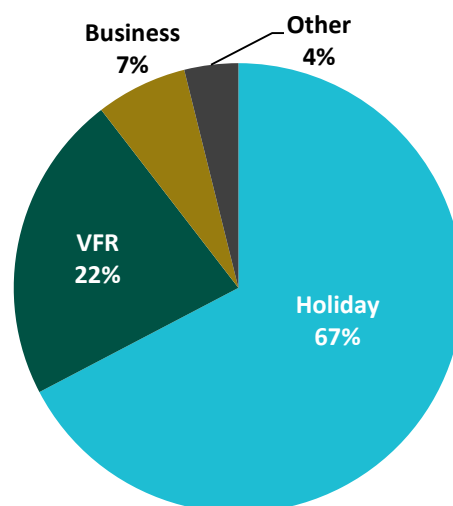
Figure C: Visitor Expenditure, 2016



### Purpose of Visit:

The main purpose of visit to Scenic Rim by international visitors in 2016 was for a holiday (62%), followed by visiting friends and relatives (VFR) (32%). A holiday was also the main purpose of visit for domestic visitors (70.1%), followed by visiting friends and relatives (23%). The purpose with the largest total growth across all visitors was VFR at 13.4% change p.a. since 2010, compared to holiday at 1.4% and business at 3.6%.

Figure D: Main Purpose of Visit to Scenic Rim by international and domestic visitors combined, 2016



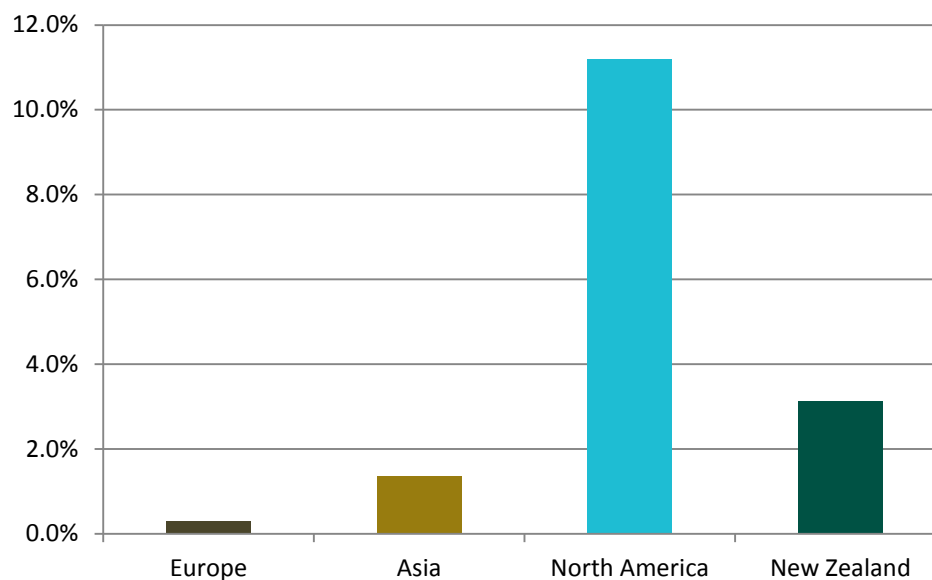
### Visitor Origins:

Whilst the majority of international visitors are from the United Kingdom (23%) and the USA (15%), visitation from Europe has fallen on average by 0.3%p.a. since 2010 (See Figure D). Whilst the UK is the highest international country origin, generally visitation from Europe has increased by only 0.3%p.a. since 2010. In comparison, visitors from Asia have grown slightly higher (1.4%p.a.) and visitors from North America have increased the most (11.2%p.a.) since 2010.

In 2016 the top five visitor origins by country were:

1. United Kingdom (23%)
2. USA (15%)
3. New Zealand (13.2%)
4. Germany (12.6%)
5. Japan (7%)

Figure E: Scenic Rim International Visitor Origin, 2010-2016

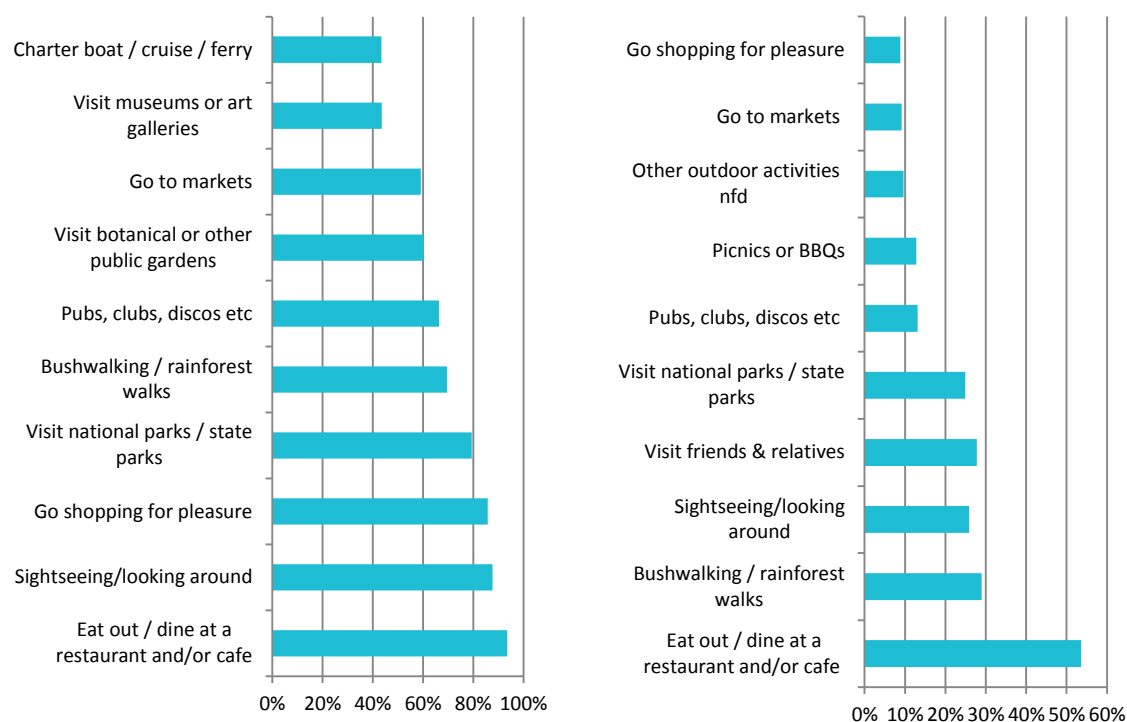


Domestic visitors mainly come from the Brisbane Region (62%), followed by visitors who come from the Gold Coast who make up 12% of the total visitation.

### Activities:

Whilst in the Scenic Rim, most popular activities across international and domestic visitors include eating out and sightseeing/looking around (See Figure F). Apart from these similarities, international visitors are far more likely to participate in going shopping, whereas domestic visitors are more likely to participate in bush walking and visiting friends and relatives.

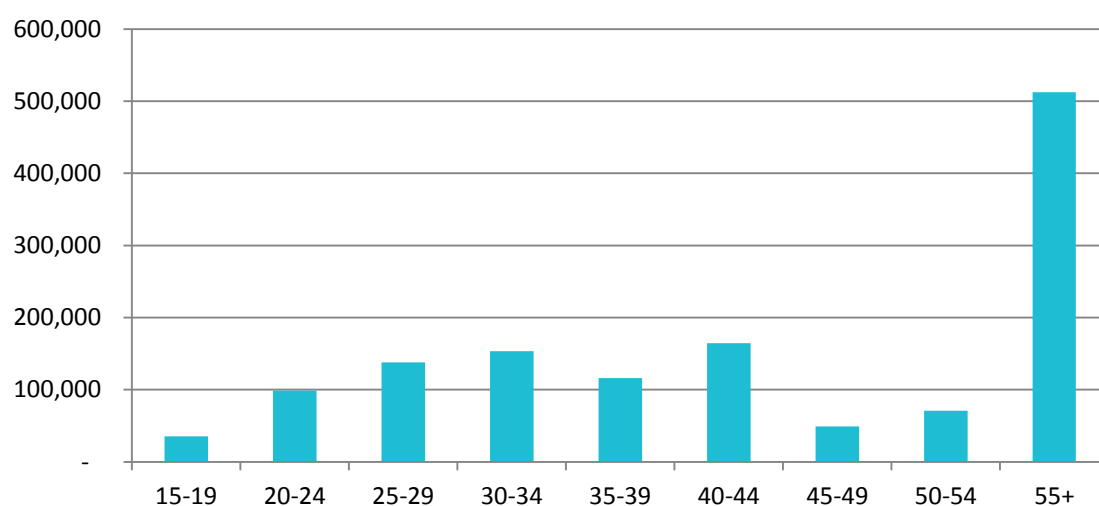
Figure F: Top 10 activities by participation rate by international visitors (left) and domestic visitors (right), 2016



### Age:

The majority of visitors to Scenic Rim in 2016 were aged 55 years and older (38%), followed by travellers who were aged between 40-44 years (12%) and 30-34 years who made up 11% of visitors to the Scenic Rim (See Figure G).

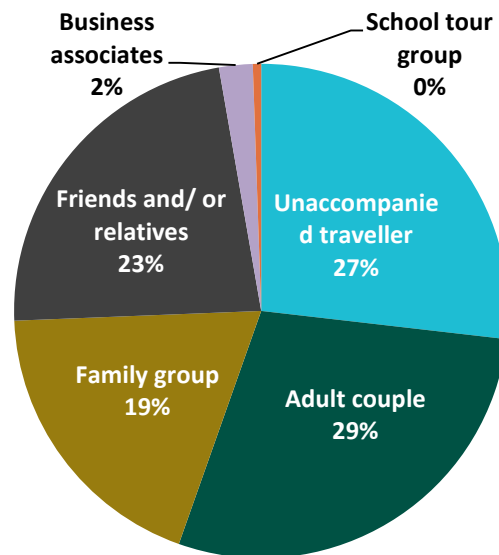
Figure G: Age Profile of Scenic Rim Visitors, 2016



### Travel Party:

The majority of overnight visitors to the Scenic Rim in 2016 were adult couples (38%), followed by unaccompanied travellers (32%) and the third most often recorded travel party was family groups (18%) (Figure H).

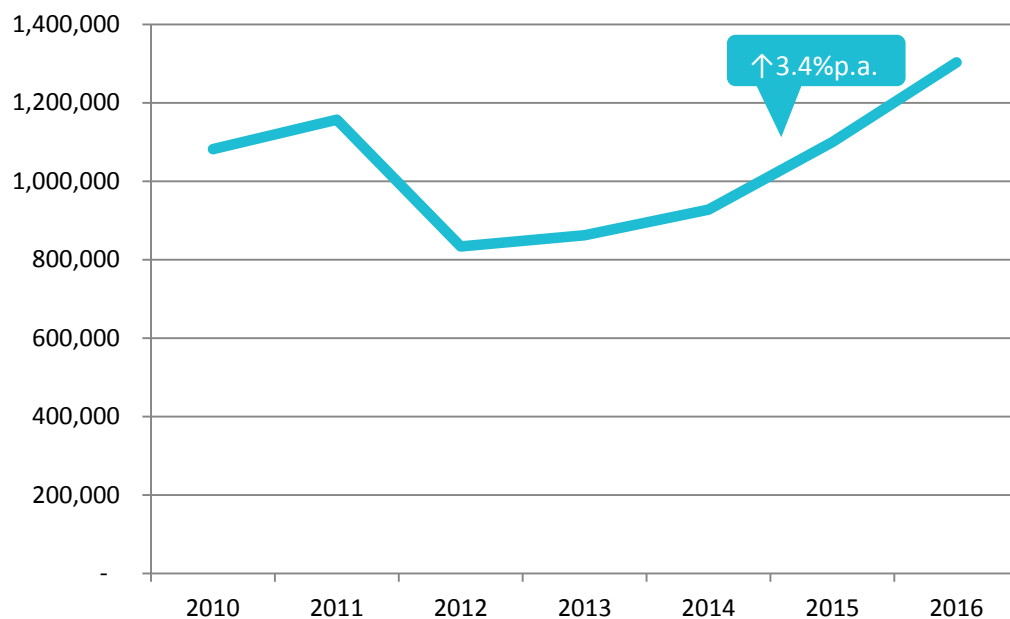
Figure H: Travel Party Profile of Scenic Rim Visitors, 2016



### Transport:

In 2016, the dominant mode of transport used to travel to, and around, the Scenic Rim was by self-drive vehicles at 97.3%, and has grown by 3.4% since 2010.

Figure I: Transport Profile of Scenic Rim Self-drive Visitors, 2010-2016

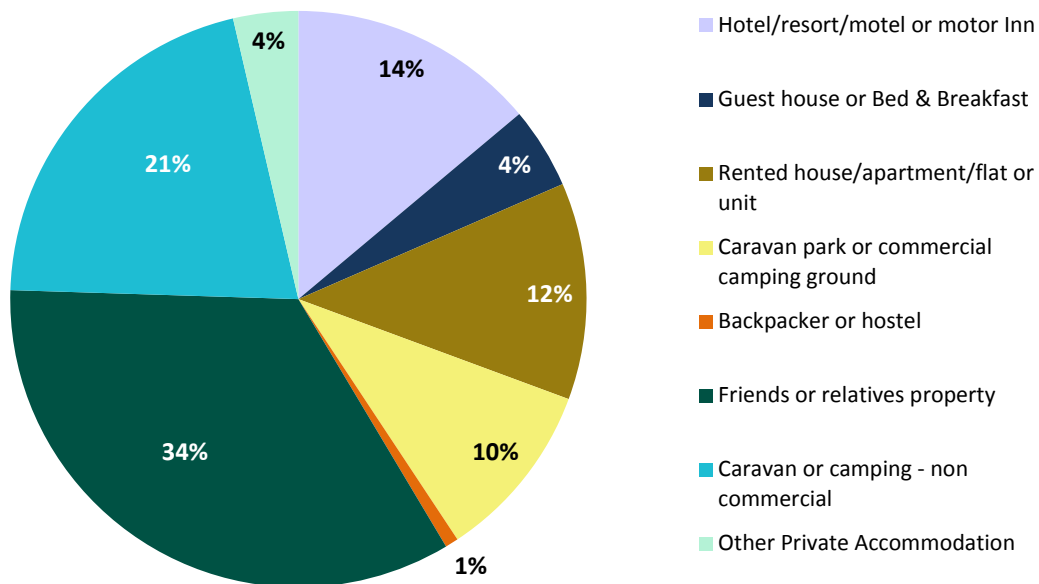




## Accommodation:

While in Scenic Rim approximately 34% of visitors stay on a friends or relatives property, 21% stay in caravans or camping and 14% stay in hotels resorts and motels.

Figure J: Accommodation Profile of Scenic Rim Visitors, 2016



## 6.2 Appendix B: Destination Benchmarks

The Scenic Rim has been benchmarked against Swan Valley, Hills Hawkesbury and Sunshine Coast Hinterland in order to assist further growth of the region, focusing on its products, infrastructure and transport. The destinations used for benchmarking have been chosen due to their similarity in their characteristics, in terms of their geographic location, population, and product offering and type.

### Infrastructure and Amenities

The Australian Tourism Data Warehouse (ATDW) is Australia's national platform for digital tourism information. With more than 40,000 listings, it includes product and destination information and data from all Australian States and Territories. This content is electronically accessible by tourism business owners, wholesalers, retailers and distributors for use in their websites and booking systems. Table A below outlines the number of products listed for each of the comparator regions, however does not represent the total number of tourist attractions in the destinations as it only counts those listed within the ATDW. The products and infrastructure listed provide a greater indication of the destinations' unique characteristics and potential strengths to focus on.

Table A: ATDW Listings for Comparator Regions

ATDW Listed Product	Scenic Rim	Swan Valley	Hills Hawkesbury	Sunshine Coast Hinterland
Accommodation	42	44	60	10
Events	7	4	25	0
Tours	6	14	14	1
Attractions	6	22	18	0
Food & Wine	25	49	11	0
Nature-based	18	13	6	5
Family-friendly	3	6	1	0
Outdoor Adventure	6	4	7	0
Marine-based	0	1	6	0
Arts, Culture and Heritage	4	9	14	0
Aboriginal	0	4	1	0

### Scenic Rim:

As exhibited in Table A, the Scenic Rim's main offerings include food and wine and nature-based products. The number of nature-based products available in the region is the highest among its comparators, indicating that nature-based tourism is the region's greatest strength. The ongoing progression and expansion of the region's natural assets as a tourism product therefore suggest an avenue to establish a unique brand for the destination.

The Scenic Rim is situated approximately an hour away from both the Gold Coast and Brisbane City, demonstrating ease of access for visitors through use of the Pacific Motorway. The Scenic Rim is primarily suited to access via self-drive vehicles due to the limited public transport options available for visitors.

The region is located within an 80 minute drive from two of the major airports – Brisbane Airport and Gold Coast airport. Both airports welcome flights from across Australia, along with a number of international destinations such as Asia, Fiji and New Zealand. It offers a wide range of functions, conference centres and activities, including the popular O'Reilly's Rainforest Retreat located near the Lamington National Park and catering up to 300 delegates. Featuring multiple venues with picturesque views and a wide range of accommodation options, the retreat fits to any budget.



### Swan Valley:

Located only 25 minutes away from Perth City in Western Australia, Swan Valley is a popular tourism destination amongst travellers. As one of Western Australia's oldest wine regions, the valley features more than 150 attractions including world-class wineries, restaurants, cafes and breweries, making it a leading food and wine destination<sup>10</sup>. The district has also recently welcomed one of Australia's top 100 gourmet experiences, Margaret River Providore, as a food experience within the valley. The business offers a one-stop sales and tasting centre and has previously hosted an episode on the television series "My Kitchen Rules". Having generated an increase in tourism visitation in the valley, the business provides a successful example of expanding and capitalising on the primary assets existing in region.

Similarly, Mandoon Estate, Western Australia's most awarded boutique winery, has also established a new large-scale venture using an existing vineyard as a new attraction for visitors. The facility features a fine dining restaurant, microbrewery, function centre, wine tasting cellar and an art gallery, and is a popular spot for various functions and events. The Vines Resort and Country Club is another popular function venue. With a capacity of 260 people, the club holds various events and conferences, including weddings and other celebratory events.

Both the Perth domestic and international airport terminals are situated within a short drive away from the valley, situated only 6 and 14 kilometres respectively.

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<sup>10</sup> [http://www.swanvalley.com.au/About\\_Swan\\_Valley/Must\\_See\\_and\\_Do/Swan\\_Valley\\_Food\\_and\\_Wine\\_Trail](http://www.swanvalley.com.au/About_Swan_Valley/Must_See_and_Do/Swan_Valley_Food_and_Wine_Trail)

Swan Valley is mainly suited to access via self-drive vehicles with very limited public transport available. Swan Valley provides a shuttle service, however access to it is limited and prior booking is highly recommended. As an alternative to the use of private vehicles, the valley also encourages the visitors to use bicycles to travel around the valley, offering a number of opportunities for bike hires and establishing the Swan Valley Heritage Cycle Trail. The Swan Valley is also accessible by train from Perth City. The journey to Guildford station, the closest station to the Swan Valley Food and Wine Trail, takes approximately 25 minutes from the city. The closest winery is located within 7 kilometres return away from the station. The Swan Valley Food and Wine Trail lasts for about 32 kilometres.



## Hills Hawkesbury

Located one hour away from Sydney, Hills Hawkesbury boasts a variety of tourism attractions. With 70% of the area covered by national parks, the region offers a number of nature and adventure based activities including bushwalking, horse riding, river cruises, water skiing and swimming. The region consists of 17 small towns and villages and 5 rivers, featuring a wide range of unique arts, culture and history related facilities.

Compared to its comparators, Hawkesbury offers a number of accommodation options and organises numerous events. The destination also features tours and attractions that provide visitors with a variety of options during their stay to suit all visitor profiles and budgets.

The Good Az Gold Tours and Transfers offers mini-bus and coach transport for various occasions, specialising in Corporate Transfers and Specialised Day tours along with other group transfers including airport transfers and weddings. The area also provides a well-developed rail and vehicular ferry services. The Hawkesbury ferry network allows visitors from the city to cross the Hawkesbury River and simultaneously serves as one of its attractions. Ferries run 24 hours a day 7 days a week, making the network very accessible.



The Richmond Club serves as Hills Hawkesbury's Entertainment Centre. The club provides a vast amount of options for both visitors and the local community, aiming to encourage a healthy and active lifestyle and foster community engagement. The club features services such as a fitness and leisure club, beauty/hair salons, function centre, childcare facilities as well as the travellers' park with a number of necessary travel facilities provided. The venue has been previously voted as Australia's premier supporter of local sporting and community groups.



### Sunshine Coast Hinterland

The Sunshine Coast hinterland is situated an hour north of Brisbane and only 30 minutes away from the Sunshine Coast. The region attracts a number of day trippers with its cool climate and charming rural setting. The towns and villages of Maleny, Montville and surrounding areas within the region contribute to its unique rural charm and feature a number of skilled artists, innovative professionals and vibrant businesses. With a variety of natural walking trails, art gallery trails and unique boutique shops, the region offers a range of opportunities for a relaxed getaway for all tourist groups.

An easy reach from Brisbane, the Sunshine Coast Hinterland is located only one hour's drive from the Brisbane International Airport. With direct flights to 28 international and 42 domestic destinations, the airport had over 21.8 million passengers travelling through the airport in the year of 2013/14. The Sunshine Coast Airport is a 35-45 minutes away with regular flights to all major Australian cities through Virgin Blue and Jetstar.

Hinterland Connect Bus Service is a service that connects different towns within the region, including Maleny, Montville, Flaxton, Mapleton & Nambour. The service also provides transport from Maleny to Landsborough Railway Station, which provides daily rail services into the Brisbane city. The journey takes approximately one hour and 20 minutes. The Mystic Mountain Tours also offer tours and coach services that feature wine and gourmet foods, parks and walks and shopping tours.

Tranquil Park, Mountain Resort is one of the biggest conference and function venues in the Sunshine Coast Hinterland. Located in Maleny, the resort includes three different conference rooms with the capacity to cater for up to 200 people, featuring a scenic view of the Glasshouse Mountains from all.



## 6.3 Appendix C: Destination & Business Case Studies

The case studies explored below demonstrate examples of businesses and precincts that have successfully diversified their products and services to accommodate for and capitalise on tourism growth in region. They further indicate opportunities available for the Scenic Rim in terms of product and service development.

### Business – Rayners Orchard, Yarra Valley

Rayner's Orchard is a small farm located in Yarra Valley, Victoria. Having struggled with returns from their traditional peach and cherry farm for years, the owner of the farm, Len Rayner, renewed his business by expanding it into a tourism operation. The farm now offers picking and tasting of a variety of fruits along with an onsite café and shop. Growing over 450 varieties of fruit throughout the year, the farm has successfully overcome the threat of tourism seasonality. This change in perspective has increased turnover by six times in a period of five years.



The main markets include Singapore and Malaysia, where countryside is rare and available fruits for citizens are scarcely fresh.

Rayner's is a unique example of how existing business can lift their returns and promote their product by intentionally diversifying their service and products.

### Tourism Precinct – Sassafras, Victoria

Located 43km east from Melbourne's central business district and home to just over 1100 people, Sassafras is a small distinct tourism precinct. The small town retains nineteenth century charm, attracting the touring market as well as many Melbourne day visitors seeking to escape the busy city setting.



The precinct has a number of available products including antiques, unique cafes and a number of arts and culture facilities. Sassafras is also home to Dandenong Ranges, which offers a number of walking tracks in a stunning natural setting and a Puffing Billy Steam Railway. The Burrinja Cultural Centre is also located within the Ranges, a vibrant community cultural centre that intends to "build community through art"<sup>11</sup>. The centre features several gallery spaces, artists' studios, a world-class

<sup>11</sup> <http://www.burrinja.org.au/about/about-burrinja>



collection of Indigenous and oceanic art, community cultural development projects and a 400 seat theatre, along with other facilities to fulfil all visitors' needs.

Although the destination offers similar products to the Scenic Rim (Tambourine Mountain in particular), it provides a more upmarket experience through better quality of services and products offered. This attracts more high-yield visitors and simultaneously establishes an upmarket branding for the destination.

### **Tourism Precinct – Montville, Sunshine Coast**

Montville is a small tourism precinct located in the Sunshine Coast hinterland with a population of approximately 900 people. The unique charm of the town and its exciting precinct mix has ensured a consistent flow of day trippers from Brisbane and the Gold Coast since the early 1990's.



The town has a unique small village charm and is famous for its variety of architectural styles from various cultures, including Irish, Swiss and English. The town is also renowned for its wide collection of unique shops that sell both local and international products, and is part of the Sunshine Coast Hinterland Gallery Trail. The trail showcases various local arts and crafts and offers a number of opportunities for the visitors to experience local culture. The precinct also offers an abundant range of dining options for the visitors.

Similar to the Sassafras region, Montville provides a high-end rural experience, attracting high-yield visitors through the provision of quality service and products.