

TOWNSVILLE

NORTH QUEENSLAND

DESTINATION MANAGEMENT PLAN 2032

COMPLETED FEBRUARY 2025 - LAST REVIEWED: MARCH 2026



ACKNOWLEDGEMENT OF COUNTRY

Townsville Enterprise pays its deepest respects to Aboriginal and Torres Strait Islander peoples as the traditional custodians of the land in Australia, and recognise their continuing connection to land, water and culture.

We pay respects to Elders past, present and emerging. We acknowledge the stories, traditions and living cultures of Aboriginal and Torres Strait Islander peoples and commit to fostering a culture of learning from and working with First Nations people in the spirit of reconciliation.

FOREWARD



Tourism is not just an industry in Townsville North Queensland—it is a vital part of the fabric that binds our communities together. Supporting nearly 9,000 jobs and injecting \$1.2 billion annually into our economy through visitor spending, the tourism sector enriches the lives of both locals and visitors alike. This Destination Management Plan (DMP), developed in collaboration with industry and

government, sets a bold vision to elevate our region as one of Queensland's fastest-growing visitor economies, with a target to increase Overnight Visitor Expenditure from \$1.2 billion to \$2.05 billion by 2032, a growth rate of 131% vs 2019.

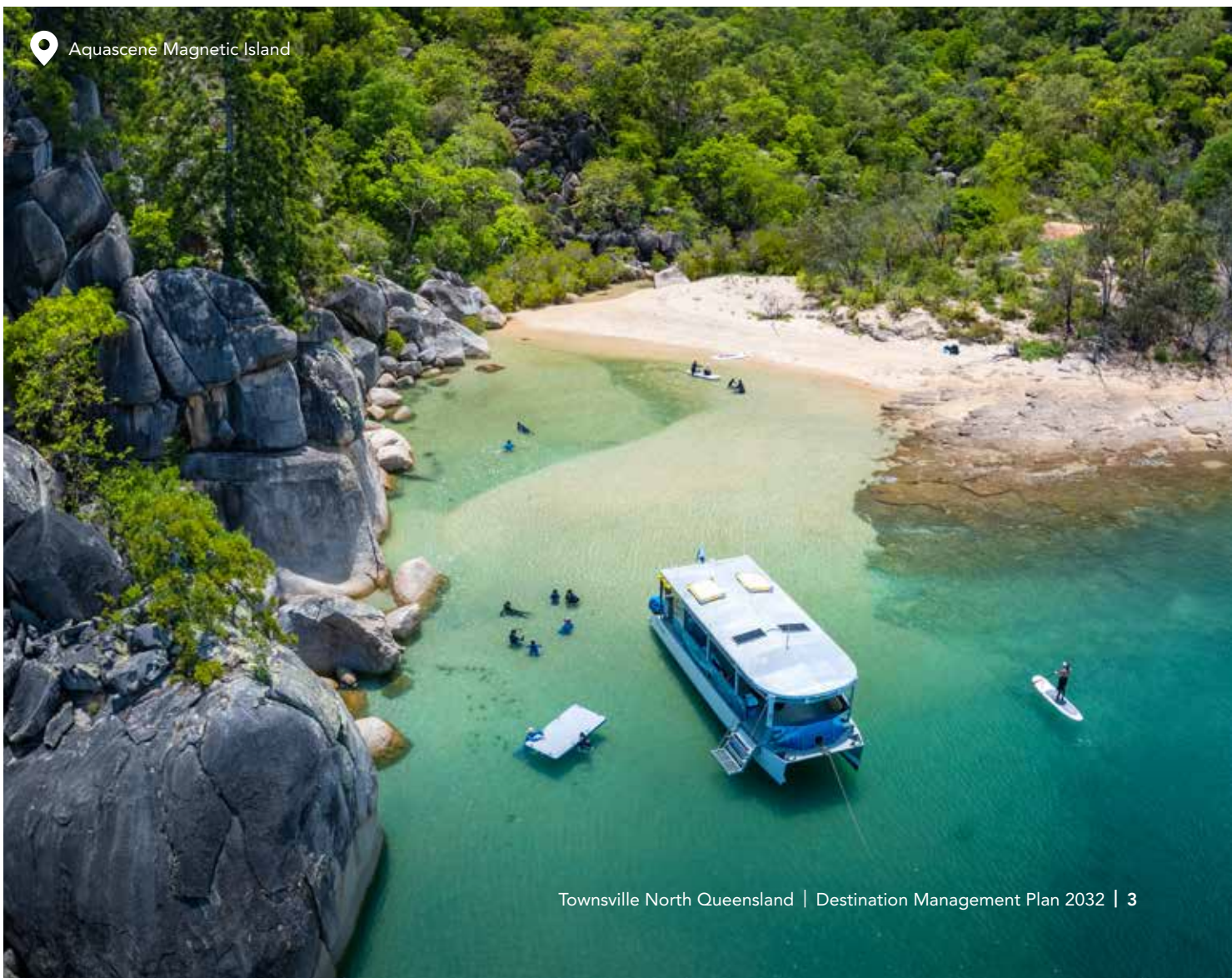
But this is not growth for growth's sake. Our plan is laser-focused on creating a sustainable, community-centered visitor economy—one that builds positive perceptions of our destination while enriching the lives of those who live here. We are committed to delivering benefits that extend well beyond tourism, strengthening the very heart of our community through enhanced liveability, environmental stewardship, and economic prosperity.

The coming decade is rich with opportunity. From our breathtaking islands to the rugged outback, our natural assets offer a diversity of experiences that captivate and inspire. Yet, our journey does not stop at showcasing the beauty of our region. This DMP is a strategic blueprint that prioritises world-class product

development, better connectivity, sustainable funding for long-term marketing, and tapping into international markets to foster enduring growth.

With this plan, we are not simply preparing for the future—we are shaping it. Collaboration and partnerships are at the core of this transformation, ensuring that every step forward is shared and supported by all stakeholders. Together, we will build a globally connected region, balancing economic growth with environmental sustainability, and ensuring that the rewards of a thriving tourism economy reach every corner of our community. Our collective vision is to turn Townsville North Queensland from an emerging destination into a leading growth destination for Queensland, leaving a legacy well beyond 2032.

Claudia Brumme
**Chief Executive Officer,
Townsville Enterprise**



Aquascene Magnetic Island

CONTENTS

1.0 INTRODUCTION	5
1.1 EXECUTIVE SUMMARY	6
1.2 TOWNSVILLE NORTH QUEENSLAND VISITOR ECONOMY	8
1.2 VISION AND GOALS	10
1.3 STRATEGIC FRAMEWORK	12
1.4 TOWNSVILLE ENTERPRISE	13
1.5 WORKING WITH MEMBERS AND INDUSTRY	13

2.0 THE TOURISM OPPORTUNITY 2032	13
2.1 UNLOCKING TOWNSVILLE NORTH QUEENSLAND POTENTIAL	14
2.2 OUR CHALLENGES	16
2.2 OUR CHALLENGES CONT.	17

3.0 TARGETS 2032	19
3.1 ECONOMIC TARGETS	20
3.2 COMMUNITY TARGET	23
3.3 ENVIRONMENTAL TARGET	23
3.4 BRAND HEALTH TARGETS	24

4.0 OUR STRATEGIC DIRECTION	25
4.1 STRATEGIC DIRECTION	26
4.2 GAME CHANGERS FOR TOWNSVILLE NORTH QUEENSLAND	28
4.3 DEMAND	32
4.4 SUPPLY	34
4.5 CONNECTIVITY	35
4.6 ENABLERS OF CHANGE	36

5.0 STAGED IMPLEMENTATION	39
STAGED IMPLEMENTATION	40

6.0 APPENDIX 1	41
6.1 THE TOWNSVILLE NORTH QUEENSLAND VISITOR ECONOMY 2023	42

7.0 APPENDIX 2	45
7.1 EXPERIENCE DESIGN	46



1.0

Introduction

1.1 EXECUTIVE SUMMARY

By 2032, Townsville North Queensland aims to become a model of sustainable tourism and community vitality, establishing itself as Australia's Most Liveable Region, supported by a \$2.05 billion overnight visitor economy.

The Townsville North Queensland region encompasses five major regional centres: Townsville and Magnetic Island, Burdekin, Charters Towers, Hinchinbrook, and Palm Island. Together, they are home to over 240,000 people and contributes \$22 billion in Gross Regional Product to our national economy annually.

The Townsville North Queensland tourism sector is the fifth largest employer in the region.

Supporting more than **8,900 local jobs** and contributing more than **\$1.2 billion** to the local economy

The industry not only contributes economically to the region, it is also a catalyst for community vitality and is at the forefront of supporting workforce attraction and regional investment.

This 2032 Destination Management Plan (DMP) emphasises liveability to enhance residents' and visitors' quality of life, health, and well-being, and provides a collective vision through to 2032.

The DMP vision leverages the region's natural wonders, cultural heritage, and community spirit to craft a vibrant destination that benefits residents and attracts travellers who enhance the social, environmental, economic, and cultural fabric of Townsville North Queensland.

Rather than pursuing growth for its own sake, this approach prioritises sustainable development that enriches both the local community and visitors.

Realising the 2032 Destination Management Plan could boost Townsville North Queensland's visitor economy to contribute \$2.05 billion annually. This growth, driven by 1.63 million domestic visitors and 328,000 international visitors, would make Townsville the fastest-growing destination for international tourism in the state. The target of \$2.05 billion represents a 131% increase over 2019 expenditure, achieved through a 6.7% compound annual growth rate.

The plan embraces and builds on a bold destination brand strategy to deliver advances in experience development, destination marketing, trade distribution and engagement, major and business events, aviation services, cruise attraction, workforce and industry development. It positions Townsville North Queensland to capitalise on the economic, social, and promotional opportunities presented by the 2032 Olympic and Paralympic Games in Queensland, further enhancing its global profile.

Holidaying remains the primary reason for visiting Townsville North Queensland, accounting for 36% of total visitors, with 39% arriving between July and September. This is followed by 29% visiting friends and relatives (VFR) and 27% traveling for business.

To sustainably grow Townsville North Queensland's overnight visitor economy, it is essential to attract higher spending travellers, extend the length of their stay, and draw visitors during the shoulder and

low seasons. This can be achieved through the development of compelling events, unique new experiences and direct aviation services. By focusing on these areas, Townsville North Queensland can enhance its appeal and economic stability, ensuring a resilient tourism sector that benefits both visitors and the local community year-round.

The focus will continue on domestic markets, particularly Southeast Queensland, Sydney, and Melbourne. International leisure visitation will be revitalised by targeting the UK, Europe, New Zealand, and the USA in the short to medium term. Additionally, new experiences and route development program is set to drive long-term growth in markets such as China, Japan, India, and Southeast Asia.

Underpinning market growth is reliable and affordable aviation access, identified as a catalyst for change to reach 2032 targets. In 2024 Townsville Airport experienced its highest visitor volume since 2012. Post-COVID, Townsville experienced an uplift in capacity from Sydney and Melbourne and new connectivity with Darwin and Adelaide. In 2024, Townsville achieved its highest frequency out of Brisbane, with 87 weekly services. This plan emphasises the destination's strong ambition and real capability in attracting a regular direct international flight between Townsville and a key international hub destination (such as Singapore, NZ or Indonesia) and aligning with Townsville Airports Masterplan to grow airport traffic from 1.5 million in 2023 to 3.7 million by 2043.

This DMP focuses on investment in new experiences including eco-tourism experiences on Magnetic Island, First Nations Tourism, Citizen Science Pontoon

The DMP will shape an environment to attract and activate 'game-changing' investments in visitor experiences that align to the destination brand pillars

at the Great Barrier Reef, Island to Outback Drive Journey, the Great Barrier Reef Marine Precinct and the Palm Island Tourism Masterplan. A differentiated reef tourism experience would offer visitors a deeper and more immersive experience by securing investment into and delivering new reef infrastructure, including an educational reef pontoon, marine departure hub, and reinstating and expanding the Great Barrier Reef Aquarium. The plan emphasises activating accessible outback visitor experiences and accommodations, including farm and station stays, to diversify the region's tourism offerings. The "Outback to Islands Drive Journey" with a strong emphasis on sustainability and local cultures will give visitors a compelling reason to extend their stay and explore further.

Catalysts for change include securing sustainable marketing funding to build destination awareness and holiday allure. Despite increased brand awareness from the "Townsville North Queensland – Up for Unexpected" brand launch, limited funding for destination marketing hampers the region's promotional efforts. Although the area has proven its capacity to yield a strong return on marketing investments (with each dollar generating \$32 in visitor expenditure), it receives 100-300% less funding compared to neighbouring

regions. This disparity in funding puts Townsville Enterprise at a competitive disadvantage in attracting visitors.

Townsville has long been the quiet achiever in hosting a calendar of events that engage and excite locals and visitors of all ages and interests. Long-term traditions of much-loved community and civic events, side by side in the annual calendar with national and international scale Major Events, showcase the region, its culture, its liveability, and its opportunities. The 'Townsville Events Strategy 'blueprint' 2024-27' outlines a city vision to use events strategically to drive and grow the region's profile and community pride – showcasing a place of liveability, attraction, and growth. The targets identified within the Townsville Events Strategy include increasing the number of supported major events, attracting more than 50,000 event-specific visitors annually, and driving marketing and communications strategies that see audience engagement with more than 2 million out-of-region participants.

Developing cruise-ready products, services and transport infrastructure is essential to fully capitalise on the growing Townsville Cruise Ship market. This investment would ensure that the region can accommodate and cater to the needs of cruise passengers effectively and maximise the economic benefits associated with high value off-peak cruise tourism. Challenges include the availability of trained guides, the small scale of operators, and need for commercial transport operators in the leisure space.

Business travel presents the potential for growth in business events and incentives, leveraging the region's strong business sector and infrastructure. Investing in new business events

infrastructure will be a key success factor in realising this market's full potential and helping to grow shoulder seasons.

Enablers for change include nurturing a culture and program of sustainable tourism, the attraction, training and retention of a skilled workforce, partnerships and collaboration across government, industry, and community.

Townsville, North Queensland, has the potential to lead Australia's future economic growth as a pioneer in renewable energy and new economy minerals. With its unique natural resources and strengths, the region is well-positioned to become a green energy powerhouse.

This transition offers substantial opportunities for tourism, allowing the development of one of Australia's most sustainable and regenerative tourism destinations. Building on our eco-destination credentials can further enhance our destination brand and attract visitors seeking sustainable travel experiences.

WHAT MAKES TOWNSVILLE NORTH QUEENSLAND DIFFERENT?

- ▶ Immersive experiences in some of Australia's best and most diverse landscapes
- ▶ Credentials in sustainability and green energy
- ▶ Friendly, down to earth locals that embrace the Australian spirit
- ▶ Home of the Great Barrier Reef and the Authentic Australian Outback
- ▶ A thriving events scene across arts, culture and sport
- ▶ Unexpected, authentic and surprising destination

1.2 TOWNSVILLE NORTH QUEENSLAND VISITOR ECONOMY



SUPPORTS
8,900
LOCAL JOBS

Townsville North
Queensland's 5th largest
employment industry



RECORD
\$1.26B
OVERNIGHT VISITOR
EXPENDITURE (YE JUNE 24)

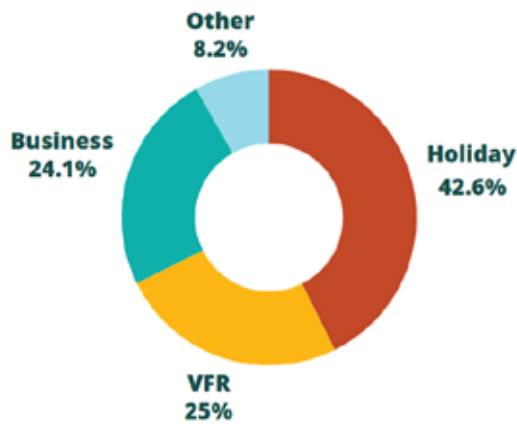
Doubled overnight
visitor expenditure in
the last decade. 42.7%
increase since Dec 2019.



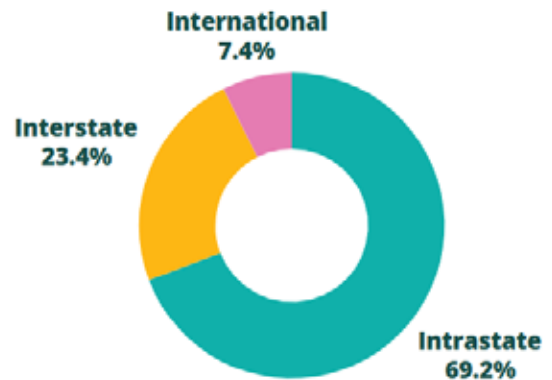
DOMESTIC
VISITOR GROWTH
22.7% YOY
(YE JUNE 2024)

Fastest growing
destination in Australia

Travel mix by purpose

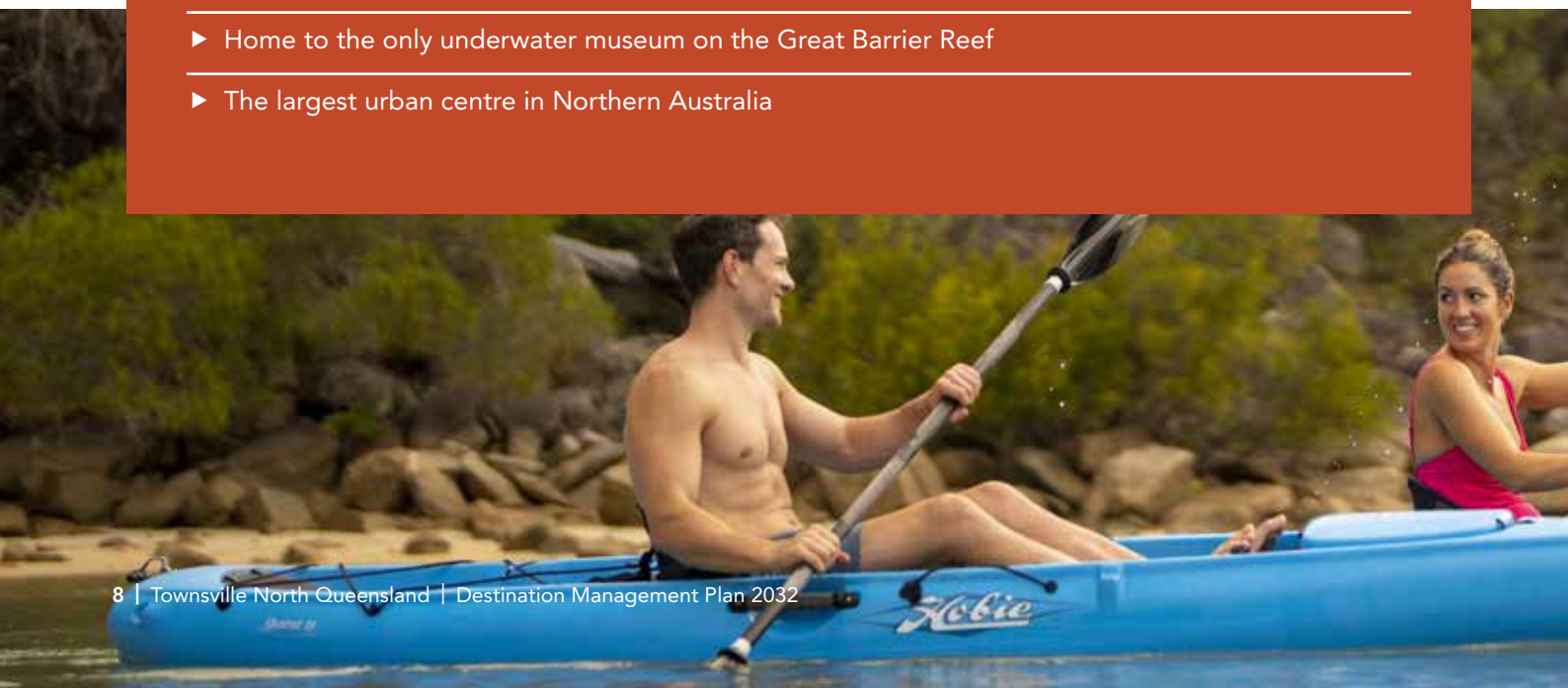


Origin of Travel



TOWNSVILLE NORTH QUEENSLAND IS PROUDLY:

- ▶ One of the top 100 most sustainable destinations in the world
- ▶ The headquarters of the Great Barrier Reef
- ▶ Home to the largest waterfall in Australia, one of the top 10 hikes and top 10 dives in the world
- ▶ Home for Northern Australia's largest colony of koalas
- ▶ Home to the only underwater museum on the Great Barrier Reef
- ▶ The largest urban centre in Northern Australia



Aviation Insights



Accommodation Insights



2024 ROOM NIGHT BOOKINGS INCREASED 11.2% VS 2019 (STR, 2019)

YE Sep 24 Average Occupancy

64.8%



AVERAGE DAILY ROOM RATE INCREASED 30.7% VS 2019 (STR, 2024)

YE Sep 24 Average Daily Rate

\$187.46



Townsville North Queensland is a growing and thriving visitor economy



Approx. \$2.5B

of new investment into the region's tourism infrastructure either recently completed or underway.



The Morris Group has invested \$450+ million into North Queensland including renovations to The Ville Resort Casino, the new Ardo five star hotel and Pelorus Island.




The Federal Government has committed \$180 million to the Great Barrier Reef Aquarium. The world's largest living coral reef aquarium and the education centre for the Great Barrier Reef.



The \$270 million channel widening at the Port of Townsville will see a doubling of cruise passengers from 2025.



Townsville is home to a new \$250 million Queensland Country Bank Stadium, and has been identified as a 2032 Olympic Host City.

 Orpheus Island



1.3 VISION AND GOALS

1.3.1 VISION STATEMENT

By 2032, Townsville North Queensland will emerge as a model of sustainable tourism and community vitality. Anchored by a commitment to attracting high-value travellers who share our social, environmental, and cultural stewardship values. Our destination has the potential to be one of Queensland's fastest growing visitor economies. Building on our status as

the the capital of major events for Northern Australia, and leading the nation's net-zero transition through sustainable fuels and green energy production, as well as eco-accredited and sustainable tourism experiences. Townsville North Queensland will emerge as a growth destination for tourism whilst retaining our authentic brand as a place where visitors can discover, explore and embrace the unexpected.

OUR VISION:

By 2032, Townsville North Queensland will emerge as one of Queensland's fastest growing visitor economies with a model of sustainable tourism that demonstrates positive community, economic and environmental benefits. We will transform the region from the islands to the outback into a globally connected destination while retaining our authentic and unrivalled power to surprise and delight visitors.

The implementation of this DMP aims to transform Townsville North Queensland, into Queensland's newest growth market for international visitation as a globally connected leisure destination that surprises, delights, educates, and inspires visitors amongst some of Australia's

most sought-after landscapes. To create a tourism destination at the forefront of offering sustainable eco-tourism experiences and at its heart is connected to the community, prioritising liveability and enhancing residents' well-being to create Australia's most liveable region.

AUTHENTIC EXPERIENCES:

We offer curated experiences that delve deep into our natural wonders, fostering partnerships with educational and scientific institutions like JCU, GBRMPA/ Great Barrier Reef Aquarium and the Australian Institute of Marine Science, as well as community and traditional owners to provide meaningful encounters with nature and culture. Proposed tourism initiatives, including the Citizen Science Pontoon at MOUA on the Great Barrier Reef, Palm Island Tourism Masterplan, and Magnetic Island Koala Hospital, exemplify our dedication to sustainable and regenerative tourism. These attractions will draw visitors and enrich our community, preserving our natural heritage for future generations. Importantly, creating authentic experiences within the regions that represent local culture, tradition and nature will support and encourage intraregional dispersal and increased length of stay. Our authentic experiences align to our core destination brand pillars: Inspire Fresh Perspectives, Explore Hidden Worlds, Taking it to the Next Level and Experience Eclectic Twists. Our experiences are meaningful, authentic and different, giving visitors the opportunity to dive deeper, find fulfillment through discovery and bring joy to their holiday.

SUSTAINABLE GROWTH:

Our region is a global hub for marine science, education, and nature conservation. Townsville North Queensland has a strong commitment to offering a sustainable visitor economy, with eco-credentials that are transforming the destination and its story to be a greener way to travel, invest and live. As a region blessed with some of the nation's best renewable energy and one of Australia's first identified locations for production of sustainable aviation fuels – Townsville North Queensland can be at the forefront of the nation's transition to a more carbon-neutral future. We support immersive educational experiences and sustainable infrastructure developments to enhance visitor experiences while preserving our delicate ecosystems.

CITY TRANSFORMATION AND LIVEABILITY:

Over the next five years, \$14.1 billion in economic infrastructure projects will create nearly 5,000 ongoing jobs and 20,000 construction jobs, requiring a skilled workforce to meet this development pipeline. Through projects like the Townsville Waterfront Renewal, including the Great Barrier Reef Aquarium, an indoor Entertainment Arena, Reef Marine Tourism Gateway and a revitalisation to the Strand - we will redefine our cityscape as Australia's Most Liveable Regional City. With 1 in 5 metropolitan residents considering relocation to regional Australia, positioning Townsville North Queensland as a prime relocation choice is crucial. Tourism provides a platform to drive workforce attraction, with familiarity in a city and region enhancing attractiveness. Recent research demonstrated a strong correlation between familiarity and willingness to relocate - with 75% of potential relocators having visited Townsville North Queensland for a holiday and 51% of those doing so in the last two years.

TOWNSVILLE NORTH QUEENSLAND WILL:



Be one of the fastest growing visitor economies in Queensland.



Secure game changing experiences.

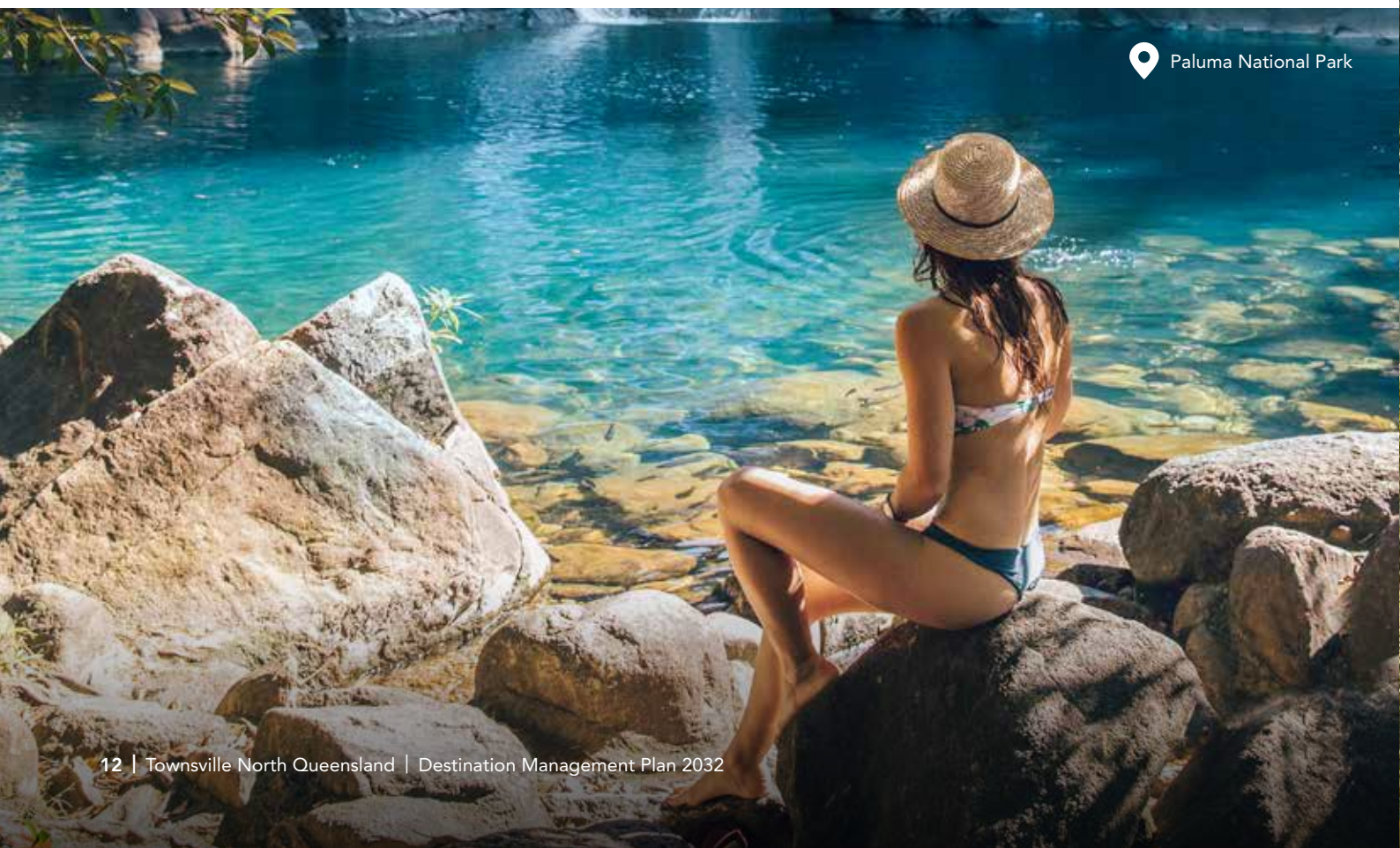
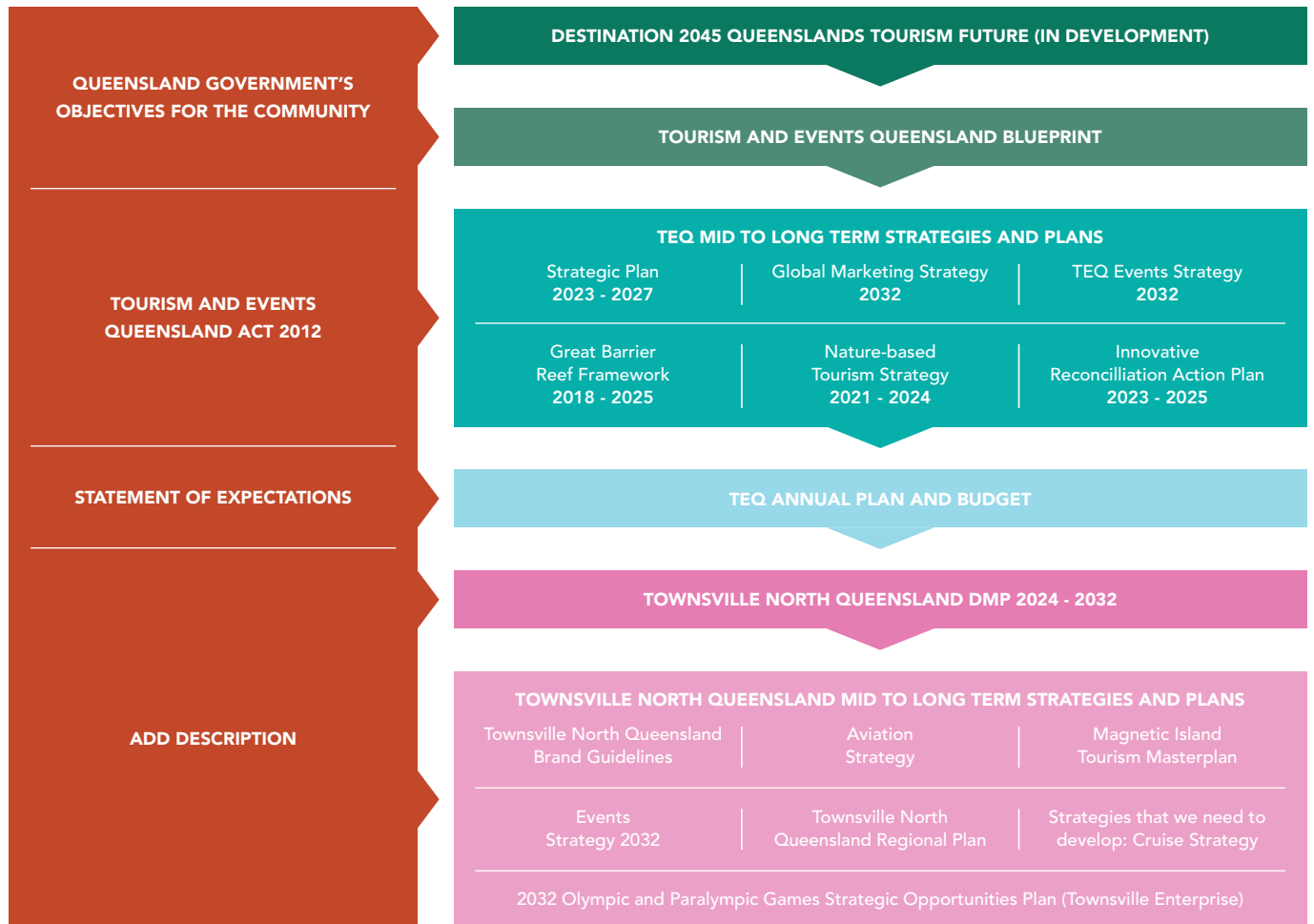


Enhance access through aviation connectivity and cruise attraction.



Be at the forefront of the green economy and sustainable fuels.

1.4 STRATEGIC FRAMEWORK



Paluma National Park

1.5 TOWNSVILLE ENTERPRISE

Townsville Enterprise is a non-partisan, not for profit, proud and growing membership-based organisation. Townsville Enterprise is the official economic development, destination management organisation and convention bureau for the Townsville North Queensland region and our core purpose is to secure the future of Townsville North Queensland.

COMMUNITY SENTIMENT:

56%

OF COMMUNITY AWARE OF TOWNSVILLE ENTERPRISE

62%

BELIEVE TEL IS EFFECTIVE IN SECURING THE FUTURE OF TOWNSVILLE NQ.

60+

VOLUNTEERS

SECURES **\$500M** IN INVESTMENT FOR THE REGION ANNUALLY.

CAMPAIGN ACTIVITY GENERATES MORE THAN **\$19M** IN VISITOR EXPENDITURE ANNUALLY

DESTINATION MANAGEMENT ORGANISATION (TOWNSVILLE ENTERPRISE)

- ▶ Represent the regional area including Townsville & Magnetic Island, Hinchinbrook, Burdekin, Charters Towers and Palm Island
- ▶ Direct liaison between local industry and all levels of Government
- ▶ Advocacy and voice of the industry
- ▶ Marketing to drive visitation to the region
- ▶ Disaster management support and recovery
- ▶ Industry development, training and capacity building
- ▶ Oversees and implements the Destination Management Plan and sets the regional strategic direction
- ▶ Works with key partners on aviation, cruise and events attraction.
- ▶ Investment attraction into tourism infrastructure and experiences
- ▶ Event acquisition and development


STATE TOURISM BODY (TOURISM AND EVENTS QUEENSLAND)

- ▶ Marketing to attract visitation to the State
- ▶ Supporting attraction of events to destinations
- ▶ Facilitation of State-wide initiatives and projects
- ▶ International in-market representation
- ▶ Provision of state wide industry and relevant data for decision making

NATIONAL TOURISM BODY (TOURISM AUSTRALIA)

- ▶ Marketing to attract visitation to Australia
- ▶ Supporting attraction of business events that drive international visitation
- ▶ Facilitation of nation wide initiatives and programs
- ▶ International in-market representation
- ▶ Facilitation of industry events including ATE (Australian Tourism Exchange).



 Mt Inkerman, Burdekin



2.0

The tourism opportunity 2032

2.1 UNLOCKING TOWNSVILLE NORTH QUEENSLAND POTENTIAL

The stage is set for Townsville North Queensland to move towards a \$2.05b in OVE by 2032 with multiple initiatives supporting the visitor economy and positioning Townsville North Queensland as Australia's most liveable region. With the 2032 Olympics a key milestone and opportunity for Queensland Tourism, it will be critical that Townsville North Queensland is ready to take a share in the economic, social and promotional benefits of the world's largest sporting event.

BRAND AWARENESS GROWTH

Townsville North Queensland has a strong brand story, developed off the back of significant consumer research, the brand has proven to deliver results. To reach 2032 targets Townsville North Queensland must influence destination awareness and brand perception. This can only be achieved through adequately funded destination brand building and marketing programs. Recent marketing investments have made significant ground into high-value visitation from Brisbane

with a more than 8.5% growth in visitor nights from this market and furthered increases in aviation capacity anticipated. This recent brand development and promotion for the region has demonstrated that for every \$1 the region invests into campaign activity more than 180 people can be reached and an additional \$32 in visitor expenditure can be derived (based on campaign results from 2023/24 FY).

NEW EXPERIENCES ON THE HORIZON

The Great Barrier Reef Marine Precinct will be an integrated multi-facility development transforming Townsville's CBD and lifestyle waterfront precinct, including the Great Barrier Reef Aquarium, an upgraded indoor Entertainment Arena, Reef Marine Tourism Gateway and revitalisation of The Strand. In partnership with these institutions, the opportunity arises to differentiate the Great Barrier Reef experience through a more immersive, meaningful reef experience. Further fuelling experience development across the region, funding is required to support the development of the Islands to Outback Journey and sustainable eco-tourism experiences such as the Magnetic Island Tourism Masterplan, and Palm Island tourism development.

LEADER IN SUSTAINABLE FUELS

Townsville's pioneering position as Australia's first producer of Sustainable Aviation Fuels (SAF) with guaranteed offtake through Qantas and Airbus, marks a transformative milestone for the aviation industry and tourism in the region. SAF will strengthen the regions position for aviation attraction, and as sustainable fuel mandates are introduced by airlines and Government, the region's ability and first mover advantage in this area will serve us well for tourism growth.

Additionally, a proposed methanol production facility will bolster the cruise sector by supplying sustainable fuels required for vessels navigating the Great Barrier Reef. This dual investment in aviation and marine fuels positions Townsville at the forefront of sustainable tourism, enhancing its economic growth and long-term environmental impact.

ROOM FOR GROWTH

The ratio of residents to visitors in Townsville North Queensland, is 12:1, making it one of Queensland's emerging tourism destinations and demonstrating room for visitor growth without encroaching on community wellbeing and sentiment. Nurturing a positive

THE INTERNATIONAL FORECAST HAS BEEN BASED ON THE FOLLOWING TIMELINE AND ASSUMPTIONS:

2025 / 2026:

Commence service using narrow-body aircraft operating 4-day per week at 70% load

2031:

Increase service to 5-day per week

2043:

Increase service to 7-day per week, with increase to 80% load

2037:

Increase service to 6-day per week, with increase to 75% load

social licence with community is a key success factor for advancing the visitor economy in harmony with the vision.

A GROWTH PLAN FOR TOWNSVILLE AIRPORT

The 2024 Townsville Airport Master Plan and the emergence of narrow body, long range aircraft position Townsville to attract increased direct services from Australia and potentially opening all markets through direct services from Singapore or Indonesia. By aligning with the Townsville Airport Masterplan, the goal is to increase airport traffic from 1.5 million in 2023 to 3.7 million by 2043. Domestic growth will be achieved through increased frequency and capacity additions with airline partners in Brisbane, Melbourne, Sydney, Adelaide, and Darwin. Townsville Airport is planning for the return of international passenger services, with works to facilitate international services forecast to be required from 2025. For the purposes of the Master Plan, International passenger traffic has been forecast at 62,000 passengers in 2025, growing by up to 122,500 passengers annually by 2043.

In terms of potential markets for a future international service – Singapore is the primary opportunity (due to the Australia-Singapore Military Training Initiative) followed by Indonesia.

FIRST NATIONS TOURISM

First Nations Tourism Opportunities presents a significant opportunity for Townsville North Queensland, with global

demand for authentic cultural immersion continuing to grow. Palm Island, an Indigenous Great Barrier Reef Island, offers unique and untapped tourism potential. Collaborating with Indigenous groups, traditional owners, and First Nations businesses to integrate cultural content across the region's tourism experiences will elevate our storytelling and provide positive social and economic benefits to local Indigenous communities.

SURGE IN BUSINESS TRAVEL

More than 5,000 skilled workers are required in the region in the next five years to deliver on the regions Project Pipeline. Due to record low unemployment rates and housing challenges, there is a requirement for more than 600,000 fly-in-fly-out room nights, generating \$149M in visitor expenditure by 2032. These projects and the potential growth in northern city HQ basing for national and global companies, also presents opportunities to grow the high-value business events sectors and VFR.

AN EMERGENCE OF LUXURY

The region has seen an emergence in investment in luxury experiences, with Ardo — Townsville's first 5-star hotel — and private island residence Pelorus changing the face of the luxury offering in the region. Ongoing investment and development of high-end experiences will continue to elevate our destination offering to attract key markets domestically and internationally.

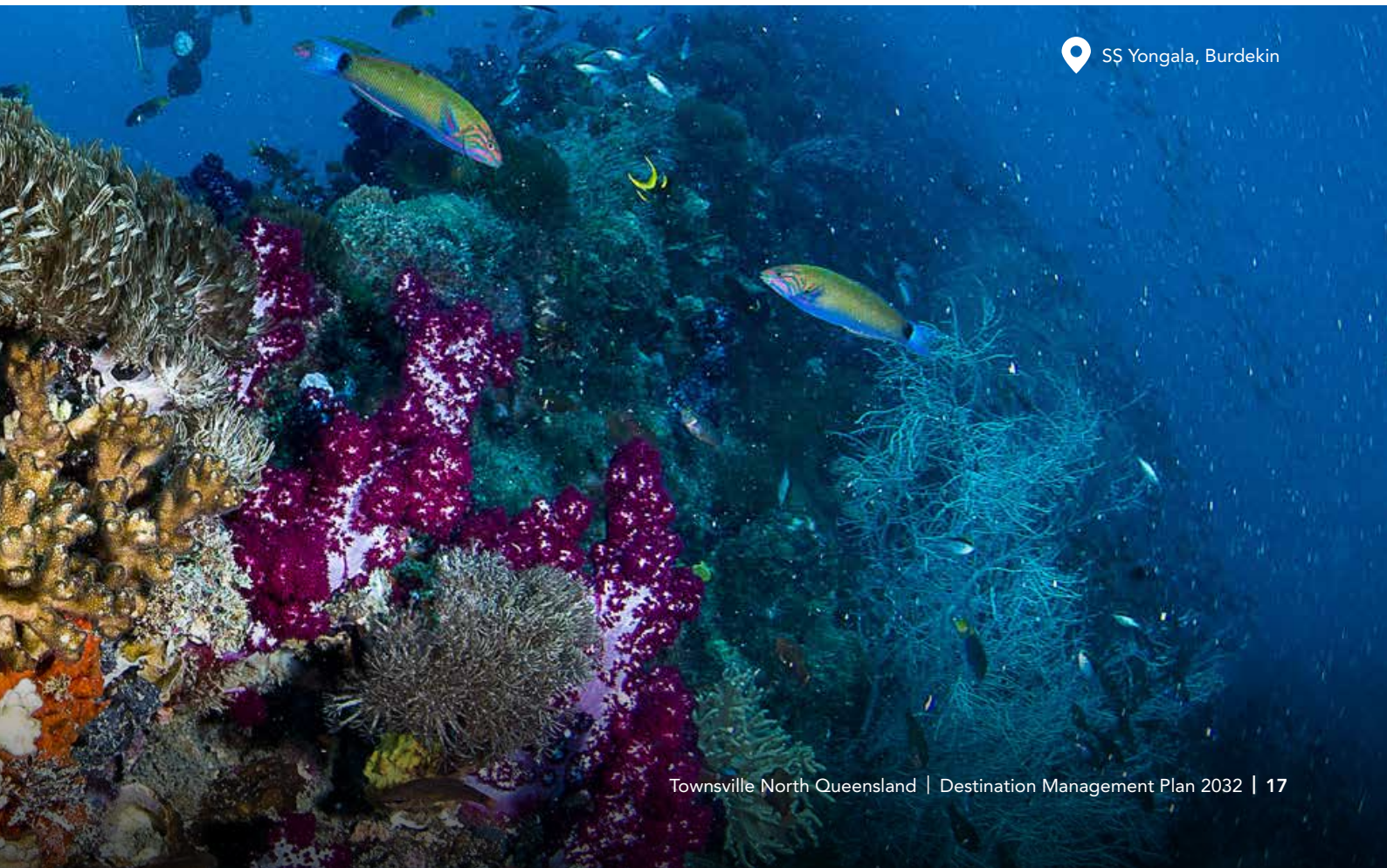
NORTHERN AUSTRALIA'S BEST EVENTS CALENDAR

Across 2023 and 2024 Townsville hosted Northern Australia's best events calendar contributing more than \$223M into the local economy. With Tourism and Events Queensland targeting a significant growth to build the Queensland events calendar to \$2b by 2032, Townsville North Queensland is primed to cement its position as the home for major events in northern Australia with existing world-class sporting infrastructure and proposed investment in indoor events facilities. Townsville is already home to some of Australia's most iconic and significant events and festivals, and the potential to extend visitor length of stay, grow regional dispersal, and increase off-peak visitation through events is a pillar for the region to reach its 2032 targets.

BIGGER AND MORE FREQUENT CRUISE OPPORTUNITIES

Recent dredging and channel widening of the Townsville Port is now allowing the provision of large cruise ships and the potential to capture greater share of this \$1B visitor market. With some of Queensland's best servicing facilities within the Townsville Port, this opens the door for increased cruise ship visitation in off-peak months and longer-term plans for cruise ship home basing.

 SS Yongala, Burdekin



2.2 OUR CHALLENGES

Townsville, North Queensland, faces a multitude of challenges in its ambition to grow the visitor economy to \$2.05b by 2032.

DESTINATION AWARENESS

Destination brand research in 2022 demonstrated a low brand power score and limited associations in relation to reef experiences, island holidays, beaches, nature and wildlife and adventure experiences, despite being able to offer these experiences in abundance. More than 30% of consumers could not name a specific place in Townsville without prompting and the destination lacked holiday allure, overshadowed by the awareness and appeal of northern neighbour Cairns.

FUNDING CONSTRAINTS

Whilst brand awareness has grown during the “Townsville North Queensland – Up for Unexpected” campaign, limited funding for destination marketing hampers efforts to promote the region effectively. While the destination has demonstrated an ability to deliver a strong return on marketing investments (every dollar invested producing \$32 in visitor expenditure), neighbouring regions receive 100 – 300% more funding than Townsville Enterprise.

AVIATION CONNECTIVITY

The lack of international flights, and high domestic airfare prices pose barriers to visitor accessibility. Declining international market share and falling average length of stay further compound the issue, exacerbated by high seasonality and pressure on visitor facilities. Townsville Airport is a shared facility for Defence aircraft which can pose challenges for commercial airlines. Defence receives precedence to the Airport and has major growth targets which can impose development requirements and restrict available runway space. Townsville Airport has international

status but has not been able to secure funding through the Government's aviation attraction funding scheme.

EXPERIENCE DEVELOPMENT

The Best of Queensland (BOQ) Experiences Program measures consumer expectations among operators engaging with Tourism and Events Queensland audiences through the Australian Tourism Data Warehouse. It is a benchmarking tool to assess and compare experiences across the State. Results exported as of 18 April 2024 showed a total of 37% of Townsville North Queensland experiences were recognised as BOQ, the lowest count along with Gladstone and Southern Country Queensland. Enhancing the visitor experience and building capacity within the industry will be crucial to realising Townsville North Queensland's tourism potential and fostering sustainable growth in the years to come.

CONSTRUCTION COSTS AND INVESTMENT

High construction costs pose significant challenges for tourism investment. These elevated expenses can deter potential investors, limit the development of new infrastructure, and increase the financial burden on existing projects. As a result, the growth and enhancement of tourism offerings in this area are often constrained, impacting the region's ability to meet demand through accommodation and fully capitalise on its natural and cultural attractions.

PUBLIC TRANSPORT LIMITATIONS

Public transport limitations in Townsville North Queensland significantly impact major events, business gatherings, regional dispersal, and cruise ship access from the port to the city. Inadequate transportation options hinder the efficient movement of large crowds during events, reduce the accessibility of business venues, and restrict the exploration of surrounding areas by tourists. Moreover, cruise ship passengers face challenges reaching the city center,

which can diminish their overall experience and limit their economic contribution to the local economy. Addressing these transport issues is crucial for enhancing the region's appeal and maximizing the benefits of tourism and events.

COMMISSIONABLE PRODUCTS

The lack of commissionable tourism products for international travel trade distribution restricts market reach. Additionally, the lack of scale and frequency of operators.

INDOOR EVENT VENUES

Townsville North Queensland faces a limited supply of large indoor event venues, which hinders the ability to support activities surrounding larger events and lengthen visitor stays. Larger indoor venues with breakout space potential are essential for hosting auxiliary functions, workshops, and social gatherings that complement major events, creating a more vibrant and extended experience for attendees. Without adequate business event spaces, the region misses opportunities to boost visitor engagement, enhance their overall experience, and increase the economic benefits from prolonged stays.

WORKFORCE ATTRACTION

The region faces significant challenges related to workforce shortages, exacerbated by a lack of affordable housing options for employees. The recovery of the international workforce post-COVID has been slow, adding further strain to the region's labour market. Attracting and retaining workers in remote areas remains a persistent issue, as potential employees often find it difficult to secure suitable accommodation. These factors collectively impact the region's ability to sustain and grow its tourism and business sectors effectively.



2.2 OUR CHALLENGES *CONT.*

2.2.1 SUSTAINABLE FUNDING

The 2032 target of \$2.05b is a bold vision beyond the stretch target set by the State. To realise this target, the destination will require appropriate funding across all aspects of the visitor economy, including experience and infrastructure planning and development, investment attraction, aviation incentives, research, brand and marketing, capacity building and workforce development.

Sustaining and growing success in the region's visitor economy demands continued investment in marketing, tourism development, and events. Past initiatives have shown that for every \$1 invested by the Government in destination marketing through Townsville Enterprise, the region sees a return of \$32 in visitor expenditure and \$1.90 in taxation revenue for the State. To maintain and

build upon these gains, an annual budget of between \$5M to \$15M annually is needed to support destination marketing, tourism development, and initiatives promoting liveability.

Traditionally, Queensland's Destination Management Organisations (such as Townsville Enterprise) have been funded primarily by federal, state and local governments from general revenue. The levels of funding provided to the 13 destination management organisations has varied greatly, providing some significant disadvantages to smaller and more emerging destinations such as Townsville North Queensland, in being able to release growth potential.

The potential funding sources identified to support sustainable funding include:

DIFFERENTIAL RATE TAX ON INDUSTRY:

An industry funding mechanism such as the differential rates levy implemented in the Gold Coast and Sunshine Coast, capturing additional rates payable by owners of commercial and industrial tourism businesses that directly contribute to supporting and growing the visitor economies in those regions.

USER PAYS MODEL:

A 'beneficiary pays' mechanism such as a visitor levy on accommodation which has been implemented in several destinations across the globe.

DIFFERENTIAL RATES ON SHORT STAY ACCOMMODATION:

Levelling the playing field for short stay accommodation such as AirBnb properties which are currently not paying commercial rates or charges and are limited in support towards the Destination Management Organisation through membership or cooperative funding.

COMMUNITY LEVY:

A community-based funding mechanism, such as an increase in general rates payable on residential and commercial properties that directly contributes to supporting and growing the regional visitor economy.

A review conducted by Deloitte Access Economics demonstrates the best benefits for Townsville North Queensland would come from a user pays model (of 2.5% - benchmarked) or an industry differential tax system (average of \$4,300 per employing business). Both systems would drive approximately \$4.2 million in additional revenue and if invested into the Destination Management Organisation for industry development,

investment attraction and destination marketing would drive an increase in visitor expenditure of up to \$55 million each year (21% of which would be driven through accommodation).

Policy adjustments are necessary to facilitate the implementation and collection of sustainable user-pays models for tourism marketing and development funding at the regional level.

MUNICIPAL AND REGIONAL DISTRICT TAX (MRDT), BRITISH COLUMBIA, CANADA

British Columbia permits municipalities and regional districts to apply a tax of up to 3% on short-term accommodation providers in their area, with the revenue used to fund tourism marketing, programs and projects. For example, the Municipality of Whistler, home to several ski resorts and other tourist attractions, raises more than \$6 million

(CAD) per annum from the tax, which has funded a range of initiatives, including upgrades to park trails, several marketing campaigns, as well as the construction of housing for resort employees. An MRDT funds the bulk of tourism marketing budgets for most areas that elect to apply one. As a result, most major cities and towns in the province apply an MRDT, with smaller towns and localities electing not to apply the tax.





3.0

Targets 2032

3.1 ECONOMIC TARGETS

TARGET 1

ACHIEVE GROWTH IN THE TOURISM ECONOMY WITH **\$2.05B** OVERNIGHT VISITOR EXPENDITURE TARGET.



GROWTH IN DOMESTIC AND INTERNATIONAL MARKETS

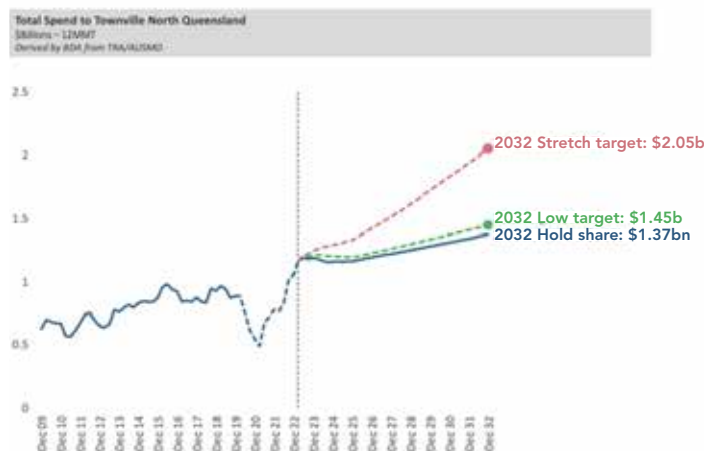


ALL YEAR ROUND VISITOR ECONOMY

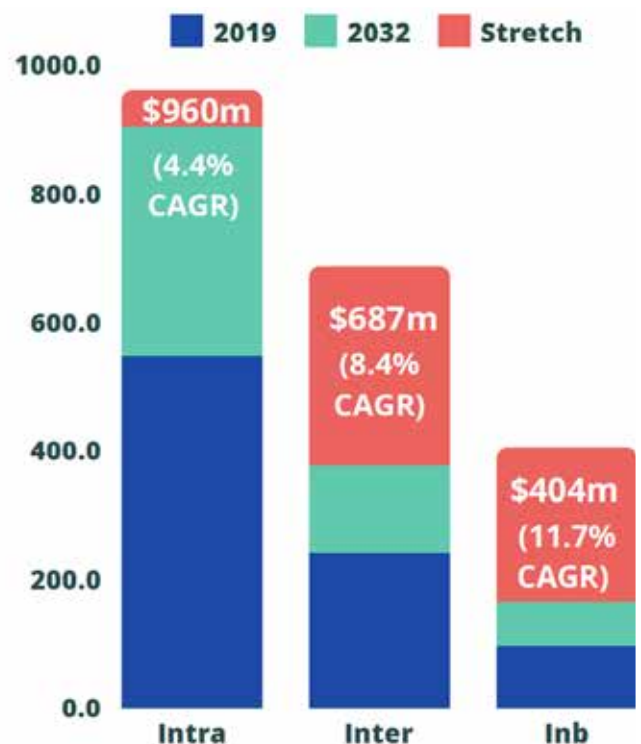


INCREASE SPEND PER PERSON

\$2.05B TARGET OVERNIGHT VISITOR SPEND 2032



Through experience development, sustainable funding and increased reliable and affordable aviation services, this DMP will deliver expenditure growth from intrastate and international markets. By targeting direct flights from Singapore, international travel is forecast to grow to \$404m.



SETTING THE OVE TARGET

By 2032, Townsville North Queensland's tourism industry aims to be one of the fastest growing tourism markets in the State. Townsville North Queensland has set a stretch target of \$2.05b, supported by a major project pipeline and growth strategies in both domestic and international markets. This delivers a 131% growth on 2019 with a compounded annual rate of growth (CARG) of 6.7%. This target has been set looking at an increase in market share, aviation growth, increase in spend per visitor and experience development that drive demand for the region.

WHAT THE TARGET LOOKS LIKE

Achieving the target of \$2.05b in overnight visitor expenditure, a 131% increase since 2019 or 6.7% annual growth, will lead to significant outcomes for Townsville North Queensland. This model has been built on the region attracting 1.63 million domestic visitors and 328,000 international visitors, positioning Townsville as the fastest-growing destination for international tourism in Queensland.

There is strong competition within the visitor economy, the high growth scenario depends on:

- ▶ Increasing visitation to the region through demand driving initiatives
- ▶ Higher overall spend per visitor/visit
- ▶ A notable increase from international leisure markets, which may bring shorter stays.
- ▶ Additionally, a focus on stabilising seasonality, through events, cruise tourism, and new markets

MARKET MIX

Townsville North Queensland will continue to focus on domestic markets, particularly Southeast Queensland, Sydney, and Melbourne.

International leisure visitation will be revitalised by targeting the UK, Europe, New Zealand, and the USA in the short to medium term. Additionally, a new experience and route development program is set to drive long-term growth in markets such as China, Japan, India, and Southeast Asia.

The following assessment table shows scores between 0-10, with 10 being the most attractive market criteria. Each score has been mapped to the information shared in Section 2.

INTERNATIONAL MARKET ANALYSIS

MARKET	SIZE	SPEND PER NIGHT OLD	OFF-SEASON	LENGTH OF STAY	EXISTING MARKET	INTENTION	EXPERIENCE ALIGNMENT	SCORE	RANK
UK	5	6	9	5	8	9	9	51	1
USA	5	6	7	3	6	9	9	45	2
NZ	9	3	5	4	6	7	9	43	3
Germany	1	2	6	3	9	8	9	38	4
Singapore	4	9	6	3	2	7	6	37	5
Netherlands	1	1	4	5	5	7	9	32	6
France	1	1	3	8	3	7	9	31	8
China	3	6	7	3	1	9	2	31	9
Japan	3	7	5	4	1	8	2	30	10
Korea	2	1	7	9	1	5	2	27	12
India	3	1	8	2	1	6	2	23	13

The above assessment has been prepared by gathering actual data for 2019 and 2023 and attaching a score based on market differences. The table above presents a strategy to grow international markets in three phases:

PHASE 1

SHORT TERM

Grow existing markets in UK/Europe, USA and New Zealand. Securing the regions foundations through product and experience development.

PHASE 2

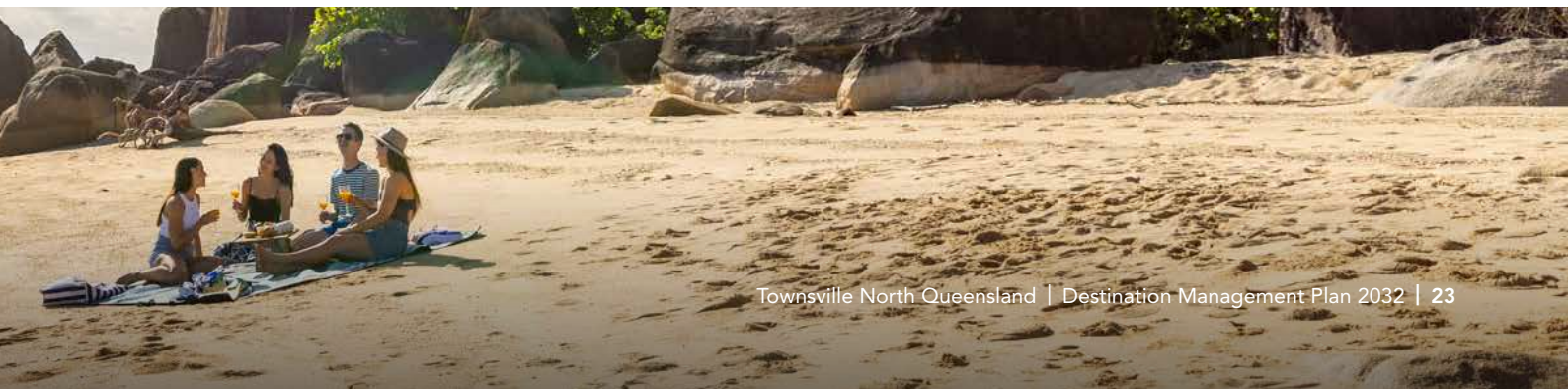
MEDIUM TERM

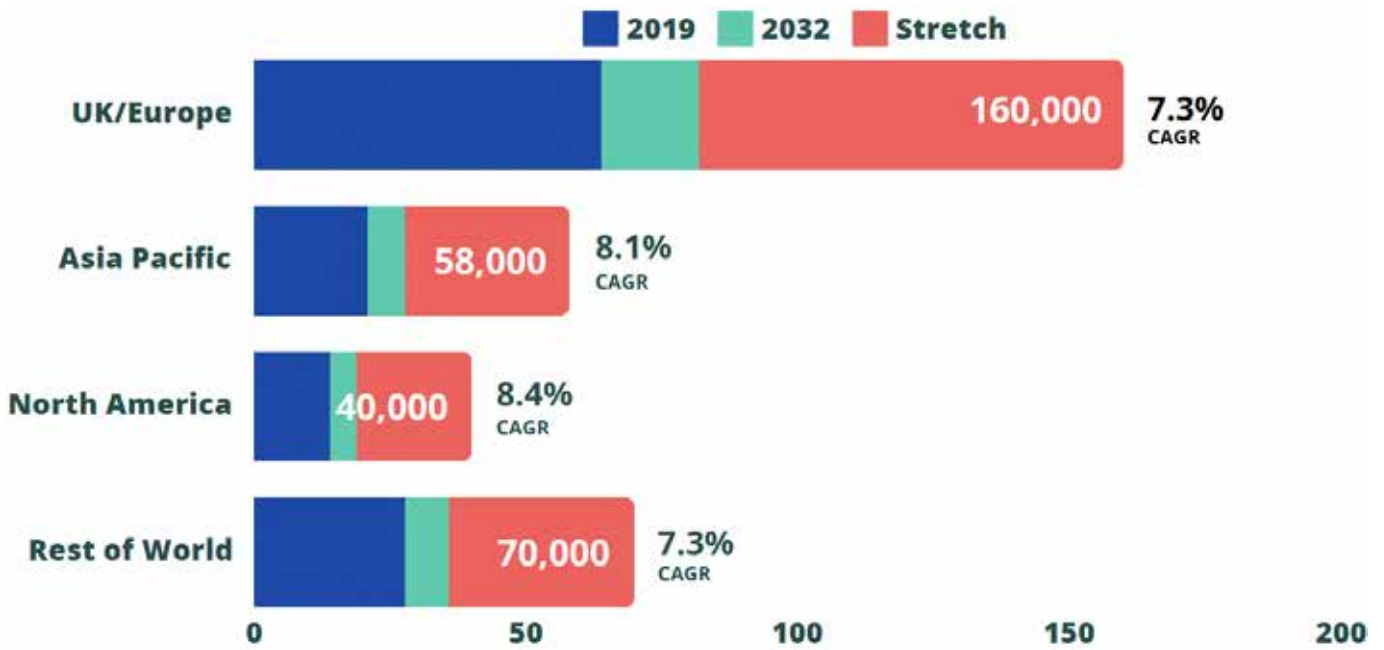
Grow Singapore, China and Japan. Expanded product and experiences suited to markets and additional aviation capacity.

PHASE 3

LONGER TERM

Grow Korea and India. Expanded product and experiences suited to markets and additional aviation capacity.





SPEND TARGETS

Townsville North Queensland has set nightly expenditure targets to represent the economic growth to 2032 and the increased mix of higher value travellers, these targets have been set using benchmarks from competitive destinations.

EXPENDITURE PER PERSON NIGHT 2032 TARGET



This is most evident with the International market as the region attracts more destination holidays via direct services from South East Asia.



3.2 COMMUNITY TARGET

TARGET 1

50%+

COMMUNITY BELIEVE TOURISM HAS A POSITIVE IMPACT ON THE LOCAL COMMUNITY

Townsville North Queensland residents are currently very supportive of the tourism industry, with 52% of locals reporting that they believe tourism has a positive impact on the local community*. Maintaining this strong support will be important as the tourism sector grows. This can be achieved through ensuring that tourism developments support local community desires and by proactively showcasing the economic, social, and cultural benefits of tourism.

TARGET 2

DEVELOPMENT OF A FIRST NATIONS TOURISM ACTION PLAN

Additionally, a key priority with the community outputs of this strategy is to develop and deliver a Townsville North Queensland First Nations Action Plan, which will foster new Indigenous experiences and help strengthen the connection between tourism and the region's rich cultural heritage.

3.3 ENVIRONMENTAL TARGET

TARGET 1

50% OF BOQ OPERATORS USING ESG TOOLKIT

Townsville North Queensland is an eco-certified destination and is at the forefront of the green energy and fuel transition. Sustainability and re-generative tourism will be a key differentiator for Townsville North Queensland, due to our credentials and capability in being able to support the Nation's net zero ambitions. For the visitor economy sustainability is a core focus, with a target to ensure that at least 50% of the region's "Best of Queensland" operators adopt an ESG (Environmental, Social, and Governance) framework to measure and report their carbon emissions.

TARGET 2

INCREASE DESTINATION AND OPERATOR ECO-CERTIFICATION

Townsville North Queensland also aims to maintain and expand destination and operator eco-certifications, supporting the region's commitment to environmentally responsible tourism.

TARGET 3

ADVANCE SUSTAINABLE AVIATION FUELS PRODUCTION

In addition, Townsville seeks to establish itself as a hub for the development of sustainable aviation fuels, positioning the region as a leader in green tourism initiatives and reducing the environmental impact of travel.

*Kantar Community Sentiment 2024



Great Barrier Reef, near Palm Island

3.4 BRAND HEALTH TARGETS

TARGET 1

INCREASE NET PROMOTOR SCORE (NPS) FOR THE DESTINATION BY

50%

TARGET 2

GENERATE A

1:32

RETURN ON INVESTMENT (ROI) FROM CAMPAIGN ACTIVITIES

TARGET 3

INCREASE TOWNSVILLE NORTH QUEENSLAND BRAND AWARENESS, AS MEASURED ANNUALLY THROUGH BRAND UPLIFT STUDIES

TARGET 4

SOURCE SUSTAINABLE FUNDING FOR ONGOING DESTINATION PROMOTION

Townsville North Queensland aims to increase its destination NPS (Net Promoter Score) by 50% through targeted brand awareness and exposure. Despite challenges identified in brand perception research, increasing awareness and positive sentiment of the region will be

key to delivering outcomes for the visitor economy. As part of this strategy, the region will measure its progress annually through brand uplift studies, these studies will assess increased perceptions of the destination for holidaying.

Townsville North Queensland aims to continue to achieve a 1:32 return on investment (ROI) from campaign activities, delivering \$32 in visitor spend for every \$1 invested. This will need to be supported by a sustainable funding source to increase marketing exposure and outcomes.



4.0

Our Strategic Direction

4.1 STRATEGIC DIRECTION

Aspirations can be summarised into 6 strategic priorities:

1.

Grow a differentiated and highly desirable brand and conversion pipeline.

2.

Become a national leader of sustainable, authentic, accessible, inclusive and transformative visitor experiences and all year events.

3.

Connect the region with Australia and the world through iconic drive journeys, cruise and aviation access

4.

Secure and maintain sustainable funding for investment attraction, brand and marketing.

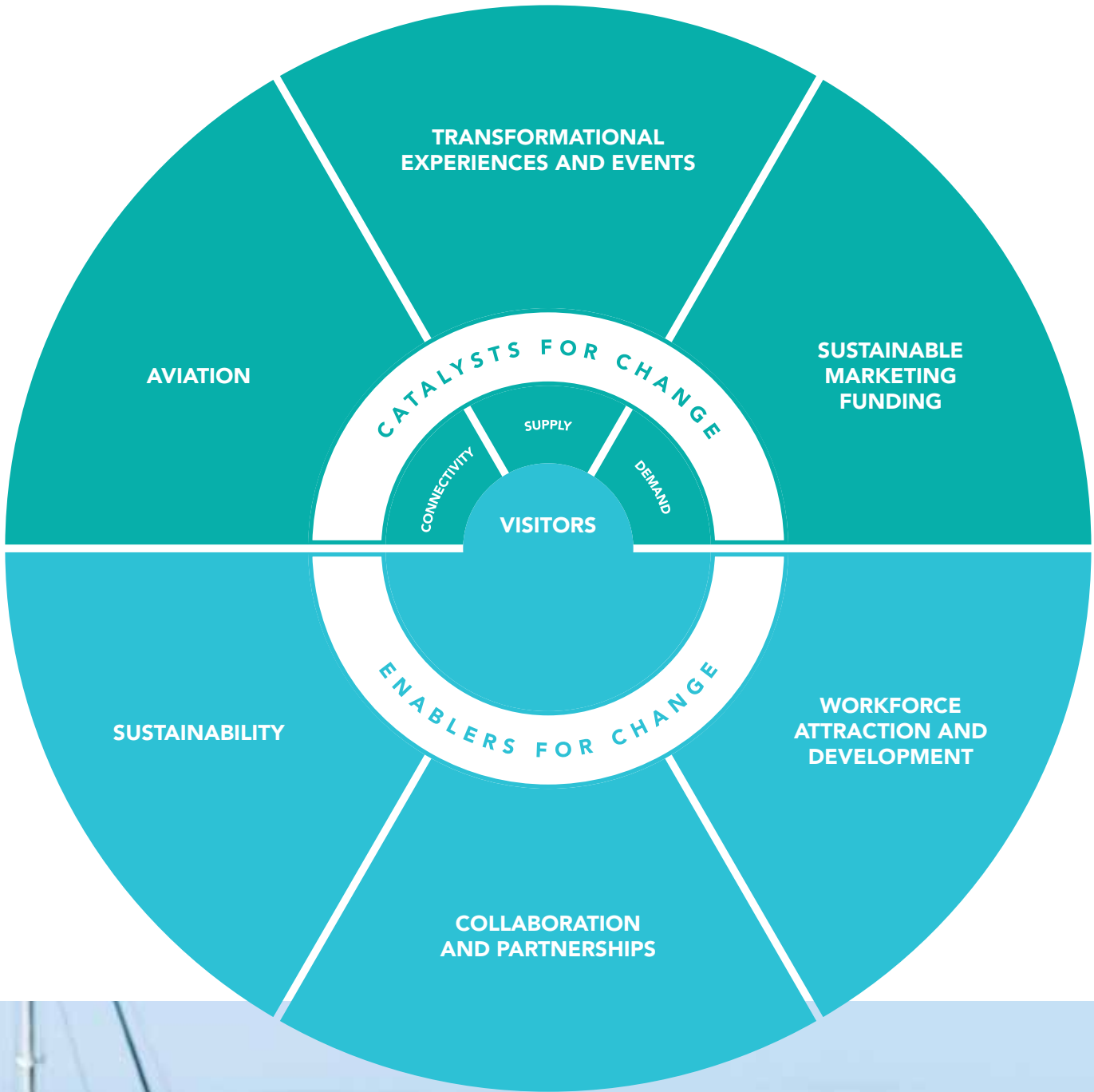
5.

Foster partnerships and collaboration across government and industry that empowers progress towards 2032 goals and the regions liveability vision.

6.

Attract and empower a resourced, skilled, informed industry and workforce working together towards 2032.





4.2 GAME CHANGERS FOR TOWNSVILLE NORTH QUEENSLAND

The following five visitor experience developments have been identified as game changers for the Townsville North Queensland region.

Game Changer	Iconic Australian Marine & Wildlife	Sustainable Tourism	Citizen Science	First Nations	Accessible Outback
1. Great Barrier Reef Marine Precinct: Townsville Waterfront Renewal with Townsville Great Barrier Reef Aquarium, an indoor Entertainment Arena, Reef Marine Tourism Gateway and Strand Revitalisation.	✓	✓	✓	✓	✓
2. Creating the Galapagos of Australia: Magnetic Island Tourism Master Plan Activation (Koala Hospital, Eco-accommodation, Bay revitalisation)	✓	✓	✓	✓	
3. World class reef education and science through a Citizen Science Pontoon at MOUA to activate GBR expedition and dive tourism	✓	✓	✓	✓	
4. Connecting Australia's greatest landscapes: Outback to Islands Drive Journey and Experience	✓	✓	✓	✓	✓
5. First Nations Great Barrier Reef Island: Tourism Master Plan for Palm Island (Walking Trail development, Havannah Island Eco-Accommodation)	✓	✓		✓	

NEW PRODUCT OPPORTUNITIES:

Following a product gap analysis, the following opportunities for new or enhanced tourism products have been identified for Townsville North Queensland. These opportunities reflect both global and domestic travel trends, supported by industry research and forecasting:

- **Luxury experiences** – The premium travel segment continues to expand, with the global luxury tourism market projected to grow at over 10% per annum to 2030 (Tourism Research Australia; Deloitte), highlighting the opportunity for high-end, immersive and place-based experiences.
- **Active adventure** – Adventure and nature-based tourism is a key growth segment, expected to drive up to 30% of regional tourism growth by 2032 (TRA), reinforcing opportunities across marine, outback, and land-based adventure activities.
- **Eco accommodation** – Sustainability remains a key driver of travel decisions, with more than 80% of travellers indicating a preference for environmentally responsible accommodation (Booking.com Sustainable Travel Report), supporting investment in eco-certified and low-impact stays.
- **Food experiences** – Culinary tourism is a major motivator, with over half of Australian travellers actively seeking local food and beverage experiences (Tourism Australia), creating strong potential for regional dining and food trails.
- **Health and wellness** – The wellness tourism sector is forecast to grow by more than 12% annually through to 2030 (Global Wellness Institute), positioning the region to capitalise on nature-based wellness, retreats, and holistic health offerings.
- **Indigenous tours and experiences** – Demand for authentic cultural tourism continues to grow, with over 60% of international visitors expressing interest in Aboriginal and Torres Strait Islander experiences (Tourism Australia), underscoring the importance of supporting Indigenous-led product development.
- **Entertainment and events** – Events play a critical role in driving visitation to Townsville, with sports, cultural, and major events contributing significantly to occupancy and visitation peaks; expanding the scale and seasonal spread of events presents a key opportunity to stabilise demand across the year (Tourism and Events Queensland; TRA).
- **Accommodation enhancement and diversification** – While Townsville North Queensland has a substantial accommodation base, there is an identified need to progressively uplift quality, diversify the offer, and align with evolving visitor expectations, particularly in the boutique, leisure, and branded hotel segments.

The following provides a summary of each project:



GREAT BARRIER REEF MARINE PRECINCT

CHANGING THE FACE OF TOWNSVILLE NORTH QUEENSLAND

The Great Barrier Reef Marine Precinct is a transformative project creating a vibrant lifestyle and cultural destination.

Global Great Barrier Reef Centre of Excellence: This precinct will feature a world-class Great Barrier Reef Aquarium and Education Centre, a reimagined Museum of Tropical Queensland, and connectivity improvements. It aims to establish Townsville as a global hub for reef education and conservation.

An upgraded indoor

Entertainment Arena: This precinct will see a revitalised entertainment venue with a multifunctional exhibition and arena. Designed to enhance Townsville's reputation as an events capital, it will host various events, from concerts to educational workshops, supporting the growth of North Australia's arts and culture industry.

Reef Marine Tourism Gateway:

Spanning 500,000 sqm of waterfront land, this precinct will be a mixed-use marina development featuring retail, dining, green spaces, and a new ferry terminal. Integrating with existing resorts, it aims to boost marine-based eco-tourism and meet regional demand for marina facilities.

Strand Revitalisation: Townsville's Strand is the region's premier tourism and lifestyle precinct. A revitalisation plan is needed for this precinct to enhance the lifestyle and commercial opportunities and better connect The Strand to the CBD and new developments.



MAGNETIC ISLAND TOURISM MASTER PLAN ACTIVATION

CREATING THE GALAPAGOS OF THE GREAT BARRIER REEF

The Magnetic Island Tourism Masterplan provides the blueprint for managing sustainable growth in tourism on Magnetic Island. Through detailed consultation the shared vision for Magnetic Island is to be a world leading sustainable island destination inspiring land and reef stewardship that enhances the quality of life of our community and strengthens the cultural identity of our island home. The Magnetic Island Tourism Masterplan identifies a series of new products and experiences that will be game changing for Magnetic Island and the entire North Queensland region. For Magnetic Island to achieve this vision a number of priorities have been identified including: infrastructure upgrades, growing the profile of Magnetic Island as the home of wild koalas in Northern Australia through a Koala Hospital, delivering high standard eco-accommodation, revitalising key visitor precincts, investment into walking trails, building new cultural experiences and enhancing the arrival and transportation on Magnetic Island.



CITIZEN SCIENCE PONTOON AT MOUA TO ACTIVATE GBR EXPEDITION AND DIVE TOURISM

WORLD CLASS REEF EDUCATION AND SCIENCE

The Citizen Science and Educational Reef Pontoon project at the Museum of Underwater Art (MOUA) in Townsville North Queensland, proposes to build a cutting-edge pontoon platform. This platform will serve as a hub for citizen science and educational activities centered on the Great Barrier Reef. It aims to enrich visitor experiences, promote reef expeditions and dive tourism, and foster sustainable reef management. The initiative seeks to deepen public engagement with marine conservation while boosting eco-tourism.



OUTBACK TO ISLANDS DRIVE JOURNEY AND EXPERIENCE

CONNECTING AUSTRALIA'S GREATEST LANDSCAPES

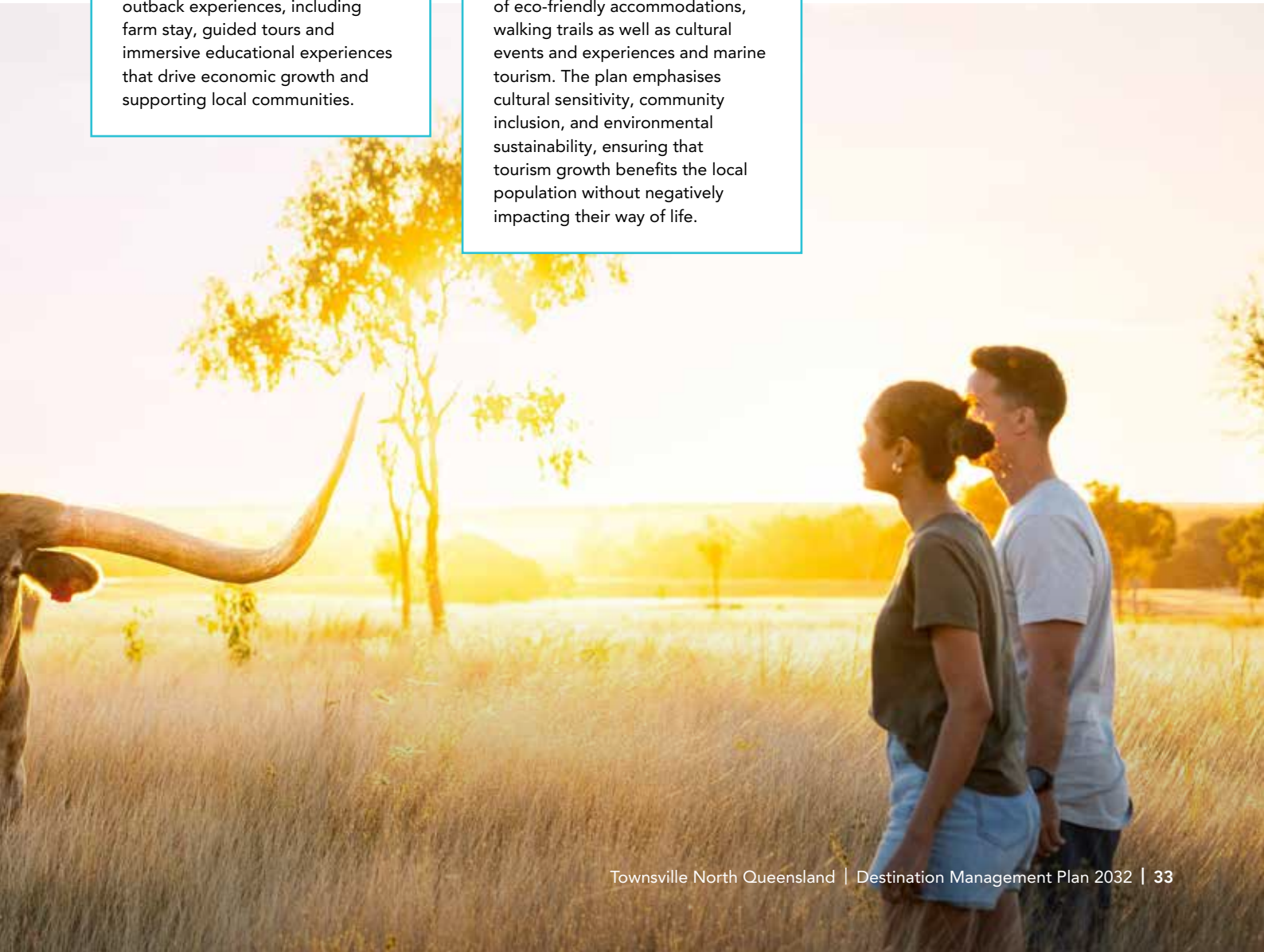
The Outback to Islands Drive Journey is a tourism initiative designed to connect the diverse landscapes of Townsville North Queensland. The project aims to establish new international ready experiences and itineraries from the islands to the outback, promoting visitor dispersal and extended stays. Investments will enhance outback experiences, including farm stay, guided tours and immersive educational experiences that drive economic growth and supporting local communities.



PALM ISLAND TOURISM MASTERPLAN

FIRST NATIONS GREAT BARRIER REEF ISLAND

The Palm Island Tourism Masterplan will leverage Palm Island's unique cultural and geographical assets to foster sustainable First Nations tourism. This plan aims to create a vibrant visitor economy that supports local businesses, generates employment, and enhances the community's socio-economic development. Key initiatives include the development of eco-friendly accommodations, walking trails as well as cultural events and experiences and marine tourism. The plan emphasises cultural sensitivity, community inclusion, and environmental sustainability, ensuring that tourism growth benefits the local population without negatively impacting their way of life.



4.3 DEMAND

STRATEGY

Grow a differentiated and highly desirable brand and conversion pipeline.

By 2032, Townsville North Queensland will have grown into a differentiated and desirable domestic brand, becoming one of Queensland's leading destinations for domestic visitors seeking transformational travel experiences. Townsville North Queensland, attracts major events, hosts vibrant festivals, and is nationally recognised as an attractive and well-resourced business events destination.

Demand generation actions and responsibilities include:

ACTIONS	LEAD	DELIVERED BY	
Establish a collaborative marketing fund, facilitated by new funding models	TEL and TCC	2026	UNDERWAY
Design and activate domestic brand and marketing programs to elevate the region's brand profile in agreed priority markets.	TEL	On Going	ONGOING
Implement targeted initiatives to grow off-season visitation by attracting international markets, major and business events and cruise.	TEL, QAL, TEQ and POTL	Ongoing	UNDERWAY
Incorporate Townsville North Queensland as a pivotal stop on an iconic Australian journey aimed at key international markets, in strategic collaboration with other prominent Queensland destinations.	TEL and TEQ	2027	ONGOING
Target high value Edu-tourism groups from target Western International Markets.	TEL, Industry	2025	UNDERWAY
Target high value, off season Cruise Ship partners to strength off-season visitation and contributions.	TEL and POTL	Ongoing	UNDERWAY
Develop a Townsville North Queensland Business Events Strategy 2025-2032	TEL	2025	COMPLETED
Activate the Townsville North Queensland Events Blueprint 2025	TEL and TCC	2025	UNDERWAY
Manage the delivery of Export-Ready Trade programs for industry	TEL, Industry	Ongoing	ONGOING
Work with all levels of government and the private sector to fund investment into game-changing and demand driving tourism infrastructure that will deliver on the vision of this DMP.	TEL, Industry	2028	UNDERWAY
Deliver regional capacity building and experience development programs to enhance the regions tourism offering and drive growth in BOQ.	TEL, TEQ, Industry	2026	ONGOING
Deliver on the yield over volume strategy, with clear market interventions to stimulate year-round visitation and help smooth seasonality.	ALL	Ongoing	ONGOING
Collaborate with regional tourism bodies to deliver a marketing strategy for the drive market that highlights signature routes.	TEL, TEQ	2025	ONGOING
Partner with established and strategic distribution channels to increase conversion and build destination awareness in international markets.	TEL, TEQ, TA	Ongoing	ONGOING
Leverage State-wide and national tourism campaigns, media famils and trade engagement opportunities to build the profile, awareness and conversion into Townsville North Queensland.	TEL	Ongoing	ONGOING
Evolve the social media strategy to focus on building reach and driving conversion to the destination.	TEL	Ongoing	ONGOING
Increase representation, awareness and products for key international markets.	TEL	2025	ONGOING



4.4 SUPPLY

STRATEGY

Become a national leader of vibrant, authentic, accessible and transformative visitor experiences and events.

By 2032, Townsville North Queensland is a national leader of vibrant, authentic, accessible and transformative visitor experiences and events, reflecting our natural and cultural values, vibrant communities and regions, catering for different types of visitors and delivering on our brand promise.

PROJECTS AND RESPONSIBILITIES

Supply activating projects and responsibilities include:

ACTIONS	LEAD	DELIVERED BY	
Establish an environment conducive to investment, fostering the development of new attractions and experiences that highlight the unique narratives of the region and the state.	TEL, TCC, Department of Tourism	Ongoing	
Activate the Magnetic Island Master Plan including development of the Koala Hospital, Walking Trails, accommodation and Precinct Development.	TEL, TMI, TCC	2030	UNDERWAY
Develop a Business Case for the Koala Colony Experience on Magnetic Island, creating a longer term vision and plan to evolve the Koala conservation program and visitor experience to 2032 .	MITA, Koala Hospital	2028	COMPLETED FUNDING REQUIRED
Unlock differentiated, expedition style experiences on the GBR by investing into a Citizen Science Reef Pontoon located at MOUA.	MOUA, TEL, State Government, Federal Government	2028	CONCEPT UNDERWAY
Collaborate with government departments and management agencies to assess policy impediments and identify opportunities for streamlining development processes in natural areas.	State Government, GBRMPA	Ongoing	ONGOING
Identify demand and develop new and enhanced tourism experiences and products that are attractive to future visitors by establishing a comprehensive framework for new experience development.	TEL	2032	
Revamp the Townsville Visitor Centers and online services to adapt to the evolving needs of the visitor market.	TEL	2029	
Grow Townsville North Queensland participation in the Best of Queensland Experiences and Transformational Experience programs to lift the quality of tourism experiences and customer service across the Townsville North Queensland,	TEL and Industry	Ongoing	UNDERWAY
Increase focus on nature based, eco tourism and regenerative tourism experiences.	ALL	Ongoing	UNDERWAY
Implement targeted initiatives to support greater accessibility across the tourism sector and recognise the importance of accessible tourism for Townsville North Queensland	TEL and Industry	2027	
Support TEQ in developing and implementing an exemplar model for tour guide training in Queensland's terrestrial World Heritage Areas to enhance the presentation of natural and cultural values through transformational experience delivery.	TEQ, QTIC	Ongoing	ONGOING
Development of the Island to Outback Drive Journey, focusing on trade ready development	TEL, CTCRC	2032	
Secure investment into the Great Barrier Reef Precinct	TEL, TCC, State Government, Federal Government, GBRMPA, Industry	2030	PARTIALLY FUNDED
Leverage tourism business attraction and investment opportunities identified through the Queensland Trade and Investment Strategy 2022-2032	TEL, State Government	2032	
Develop working groups and business cases to support delivery of gamechanger projects	TEL, Industry	2029	UNDERWAY
Lead tourism investment attraction in Townsville North Queensland, leveraging existing programs and whole of government investment attraction strategy, including a one-stop concierge service for potential tourism investors and developers at TEL, a facilitated approach to tourism investment, investment attraction events, marketing and regional tourism investment snapshots.	TEL, TCC	Ongoing	ONGOING
Develop an ESG toolkit to support operators to develop a clear, sustainable and measurable pathway to net zero emissions.	TEL, QRTN, TEQ	2025	COMPLETED
Develop a First Nations Tourism Action plan to support development of authentic cultural experiences across the region.	TEL, regional councils and First Nations	2025	UNDERWAY
Increase number of eco-certified and ESG-ready operators in the region as well as eco-certified tour guides and master reef guides.	TEL and Industry	2026	ONGOING
Advocate to enable greater access to the Great Barrier Reef and Hinchinbrook Island.	TEL and HSRC	2026	ONGOING
Support SAF and Methanol production in region to become a national leader in this sector	Industry	2029	ONGOING
Invest in data that provides realistic, up to date insights to support destination management.	TEL, TEQ	2026	COMPLETED
Prioritise housing challenges to support workforce challenges.	TEL, Regional Councils	2025	ONGOING

ACTIONS	LEAD	DELIVERED BY	
Leverage the tourism brand and campaigns and extend destination branding through liveability promotion to support workforce attraction.	TEL and Industry	2025	COMPLETED
Support QTIC's industry workforce development programs to support tourism workforce challenges.	QTIC, TEL	Ongoing	
Maintain the Designation Area Migration Agreement for Townsville North Queensland and advocate for migration policy changes to support fast-tracked, streamlined employment opportunities for overseas workers.	TEL, Federal Government	Ongoing	ONGOING
Work with Townsville City Council to find solutions to the sewage capacity challenges on Magnetic Island to support delivery of the Magnetic Island Tourism Masterplan.	TCC, TEL, MITA	2026	

4.5 CONNECTIVITY

STRATEGY

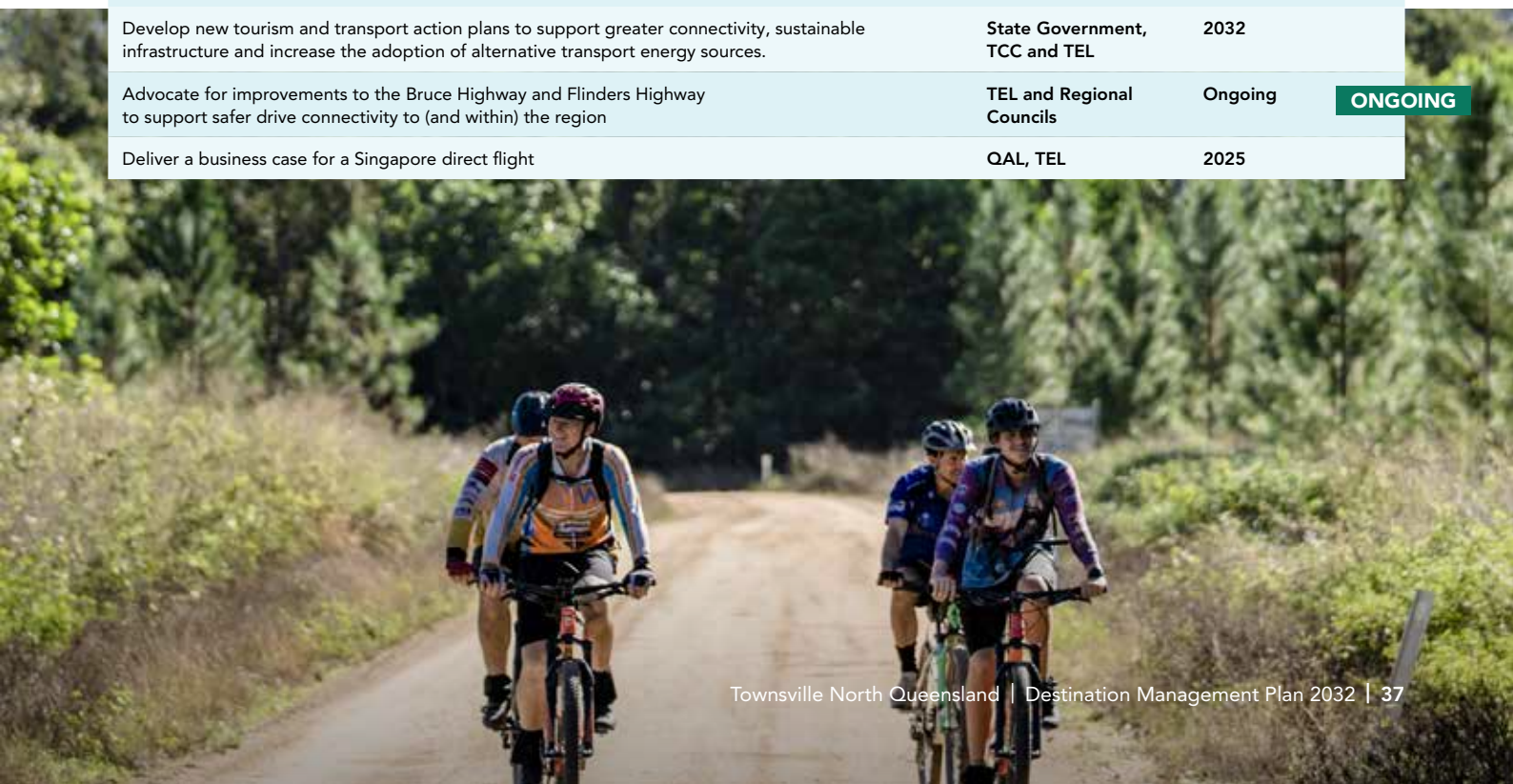
Connect the region with Australia through drive journeys, transport solutions and aviation access.

By 2032, Townsville North Queensland is seamlessly connected to the world with infrastructure and services that meet visitor demands, connected and accessible regions, and communities that support and value the contribution visitors make to their environment and lifestyle.

PROJECTS AND RESPONSIBILITIES

Connectivity projects and responsibilities include:

ACTIONS	LEAD	DELIVERED BY	
Expanding direct air access through accessing route development funds to bolster the region's market share of domestic travellers from eastern metropolitan areas and international hubs (i.e. Singapore, Indonesia) as an international gateway port.	QAL, TEL	2028	
Embrace a proactive strategy for regional visitor dispersal by focusing on iconic journeys and experience enhancement.	TEL, QRTN, TEQ	2026	
Implement a strategic approach to link visitor Townsville precincts with wayfinding and transport infrastructure	State Government	2032	
Securing funding for marine infrastructure and facilities to fully unlock the Great Barrier Reef and islands' potential as a unique regional differentiator.	TEL, Industry, State and Local Government	2030	
Supporting regional touring product development aimed at maximising visitor expenditure in anticipation of the forecasted growth in the cruise industry.	POTL and TEL	2026	ONGOING
Support TEQ to develop and implement (subject to government and industry endorsement) a new Queensland drive tourism strategy to build drive tourism across Townsville North Queensland	TEL and QRTN	2025	
Develop new tourism and transport action plans to support greater connectivity, sustainable infrastructure and increase the adoption of alternative transport energy sources.	State Government, TCC and TEL	2032	
Advocate for improvements to the Bruce Highway and Flinders Highway to support safer drive connectivity to (and within) the region	TEL and Regional Councils	Ongoing	ONGOING
Deliver a business case for a Singapore direct flight	QAL, TEL	2025	



4.6 ENABLERS OF CHANGE

STRATEGY

Attract and empower a resourced, skilled, informed industry and workforce working together towards 2032.

SUSTAINABILITY

By 2032, Townsville North Queensland is recognised as a global leader in sustainable tourism experiences with a clear industry pathway towards net zero emissions, and a thriving nature-based tourism sector that balances tourism development with environmental preservation, protection, and interpretation.

TALENT AND SKILLS

By 2032, Townsville North Queensland tourism businesses are highly capable and attract a skilled, resilient and world-class workforce who deliver exceptional service and experiences.

PARTNERSHIPS AND COLLABORATION

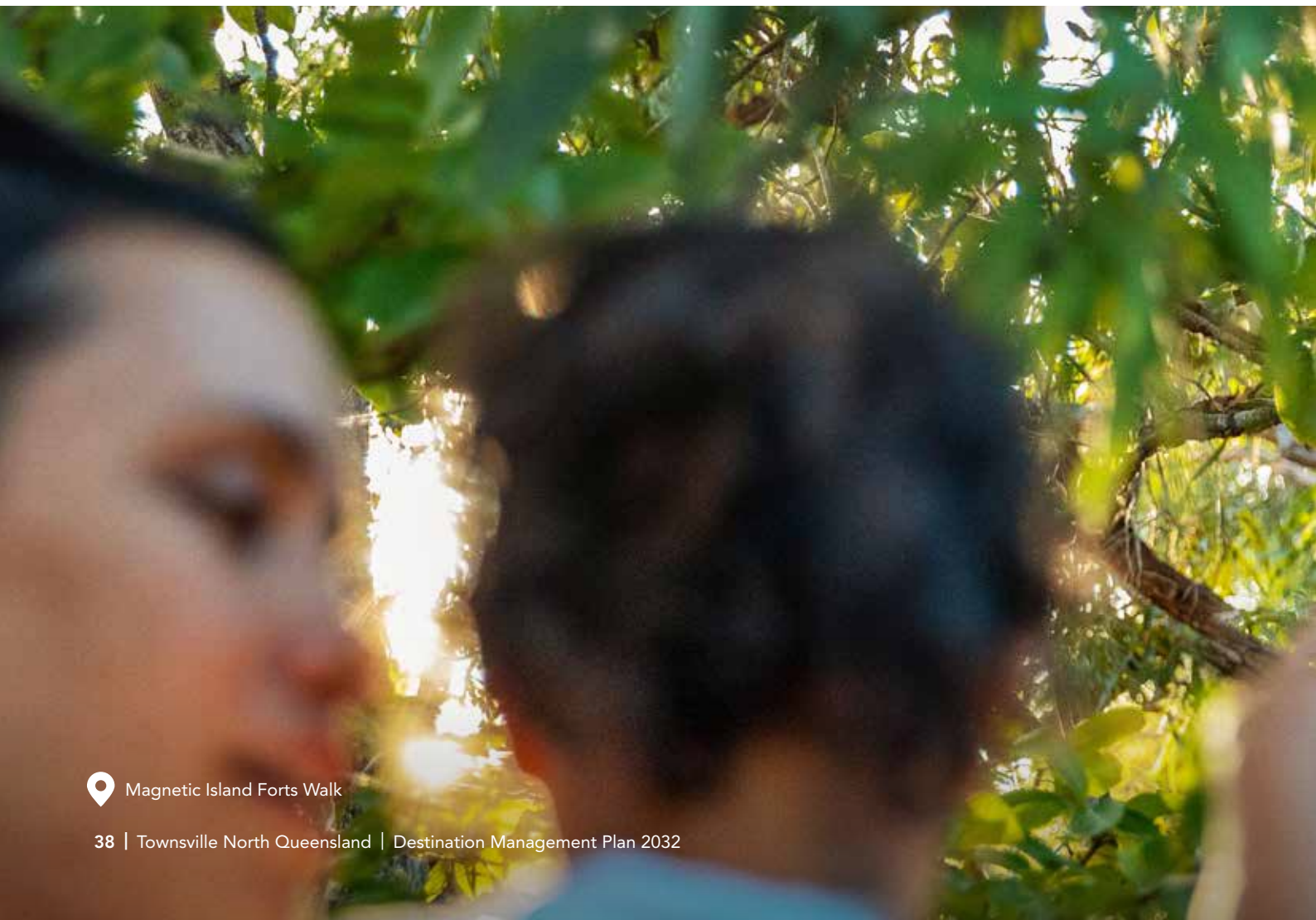
By 2032, Townsville North Queensland has a highly functioning tourism network, operating as an effective partnership model that utilises evolved technology strategies that harness data, platforms and partnerships to enhance service delivery and inform decision-making while also applying a consumer centric approach to further Townsville North Queensland competitive advantage.

PROJECTS AND RESPONSIBILITIES

Local projects and responsibilities include:

ACTIONS	LEAD	DELIVERED BY
Reimagine and relocate the Townsville Visitor Information Center (VIC) to a new precinct, creating a comprehensive one-stop shop for tourist information, bookings, and Cruise Ship support.	TEL	2029
Implement a business scale-up program tailored for the visitor economy, supported by mentorship from seasoned entrepreneurs, brand ambassadors to empower businesses to seize opportunities and effectively respond to the increasing market demand within the tourism sector.	TEL	Ongoing
Enhance collaborations between the tourism, events, and education sectors to cultivate and enhance the skills of the future workforce.	QTIC, TEL	Ongoing
Establish an annual Policy Agenda in collaboration North Queensland Regional Organisation of Council. This initiative aims to synchronise our efforts around critical shared State and Federal policy objectives to propel the visitor economy forward.	TEL, NQ ROC	Ongoing

ONGOING



ACTIONS	LEAD	DELIVERED BY	
Talent and Skills			
Advocate at the national level for opportunities to streamline visa processes to more easily attract skilled migrants to fill critical shortages in the tourism workforce.	TEL and NQ ROC	Ongoing	ONGOING
Deliver targeted business capability support to enable small businesses to excel in the Queensland tourism industry.	TEL	Ongoing	ONGOING
Investigate new approaches to help the tourism industry attract and retain a highly skilled workforce.	QTIC and Industry	Ongoing	
Encourage participation in the Young Tourism Leaders program to encourage more young people to have a career in tourism and develop more young people to be advocates for working in tourism, events and festivals.	QTIC and Industry	Ongoing	







5.0

Staged & Evolving Implementation

STAGED AND EVOLVING IMPLEMENTATION

PHASE 1:

2024 – 2026

Build and grow:

Focused effort to build demand and grow the industry. Securing the regions foundations through product and experience development.



PHASE 2:

2027 – 2030

Emerge and relaunching:

Securing sustainable funding to ensure an increased growth trajectory. Increased efforts to build demand and launching new experiences and new international markets for Townsville North Queensland.



PHASE 3:

2030 – 2032

Capitalise and Maximise:

Achieve sustainability targets, secure growth in international markets and leverage opportunities from Queensland hosting the 2032 Olympics.



6.0

Appendix 1

6.1 THE TOWNSVILLE NORTH QUEENSLAND VISITOR ECONOMY 2023

To achieve the 2032 target of \$2.05b in overnight visitor expenditure in Townsville North Queensland, including holiday, leisure events, business events, and business travel, it is crucial to position the region as a prime choice through its liveability. With many metropolitan residents considering relocation to regional Australia within the next three years, familiarity with Townsville North Queensland enhances its attractiveness. Notably, 75% of potential relocators have visited previously, and 51% have travelled there in the last two years.

The Townsville North Queensland region enjoys a more balanced and diverse visitor economy compared to nearby destinations that rely heavily on leisure travellers. Holiday visits lead with 42.6% of visitors, while the visiting friends and relatives (VFR) segment has been easing since 2014, now accounting for 25% of visitors. Business travel has remained relatively stable over the last decade, making up 24.1% of visitors.

The region encompasses five major regional centres: Townsville and Magnetic Island, Burdekin, Charters Towers, Hinchinbrook, and Palm Island. It is home to over 240,000 people, contributing \$22 billion in Gross Regional Product to our national economy each year.

Over the next five years, the region plans to implement over \$17.6 billion in committed projects, creating nearly 2,259 ongoing jobs and 8,000 construction jobs. Promoting the region to attract a skilled workforce is essential to fulfill this development pipeline.



MARKET SHARE:

Townsville North Queensland has a lower share of interstate visitors than most competitors at 0.6% and the lowest share of interstate holiday trips at 0.8%. Townsville North Queensland had been losing share of international trips pre-Covid with a share of total trips at 1.4%, and the lowest share of international holiday trips at 2.2%. There is a heavy European visitor presence in the region with Germany and UK well ahead and no non-western country in the top 5 source markets.

OPPORTUNITY:

Continue to build on recent gains in market share from Brisbane and secure improvements in aviation services to growth share from priority domestic and international markets.

EXPENDITURE:

Intrastate visitors hold similar expenditures in most destinations with \$163 per night, though TNQ leads all at \$206. Interstate spending is lower in Townsville North Queensland, and all Queensland competitors spend \$169 per night compared with a high of \$241 in TNQ. International spending in the region is also lower than competitors at \$66 compared to the \$150 high in TNQ.

OPPORTUNITY:

Focus strategy to grow share of 'high-value travellers' and length of stay in priority domestic and international markets to increase destination expenditure.

AVERAGE LENGTH OF STAY:

The average length of trips by intrastate visitors has seen growth since 2017 and sits at 3.2 nights June 2023. Interstate length of stay for all purposes spiked in Covid but has now fallen to 6.1 nights per trip. Interstate Holiday was down in the last decade, though just picked up in recent times to 5.5 nights per trip. International length of stay is longer, with working holiday accounting for a high volume of nights and lifting strongly since 2018 with pre-Covid up to 11.5 nights.

OPPORTUNITY:

Focus on experience development and events to extend the length of stay and regional dispersal within domestic markets during low season months.

VISITOR LIFESTAGE:

'Lower older' is the largest visitor segment by lifestage to Townsville North Queensland at 31% total and 34% of holiday visitors. Townsville North Queensland also attracts a higher portion of 'lower younger' visitors than any competing destination at 15.5%. 'Families' represent a prominent lifestage for holiday visitors at 27%, though Townsville North Queensland is below most competitors. Older Affluent are lower comparatively with 14% of total and 12% of holiday visitors, and Townsville North Queensland has the lowest percentage of 'affluent younger' visitors at 12% total and 9% holiday. Competitive gains were made through Covid with affluent families and affluent older, though this has turned back post-Covid.

OPPORTUNITY:

Grow share of higher-value travellers in the younger and older affluent life-stage segments through accommodation and experience development and strategic marketing.

SEASONALITY:

Townsville North Queensland's peak season is the July to September quarter, with the Whitsundays, Cairns, and Darwin sharing the same high season for total visitors. Holiday visitation to Townsville North Queensland similarly peaks in the July to September quarter, with 29% of total and 39% of holiday visitors.

OPPORTUNITY:

Focus on experience development and events to extend the length of stay and regional dispersal within domestic markets during low season months.

ACCOMMODATION:

Friend/relative's property is the most popular option for Townsville North Queensland visitors with 34% of total stays and 21% of holidays. Standard hotels/resorts are prominent and higher than most competitors at 20% total and 21% holiday. Caravan parks and camping are prevalent and have higher usage than all competitors at 15% for holiday stays. The region is lower than all competitors for 4-5* hotels / resorts, with 13% of total and 9% of holiday stays.

OPPORTUNITY:

Attract higher-value travellers by stimulating and supporting investment in improvements to high quality, experience-rich accommodation destinations and experiences.



An aerial photograph of a marina and residential area, overlaid with a semi-transparent green filter. The marina is filled with numerous boats docked at piers. The residential area consists of several large, multi-story buildings with light-colored roofs. The overall scene is a mix of water, boats, and urban development.

7.0

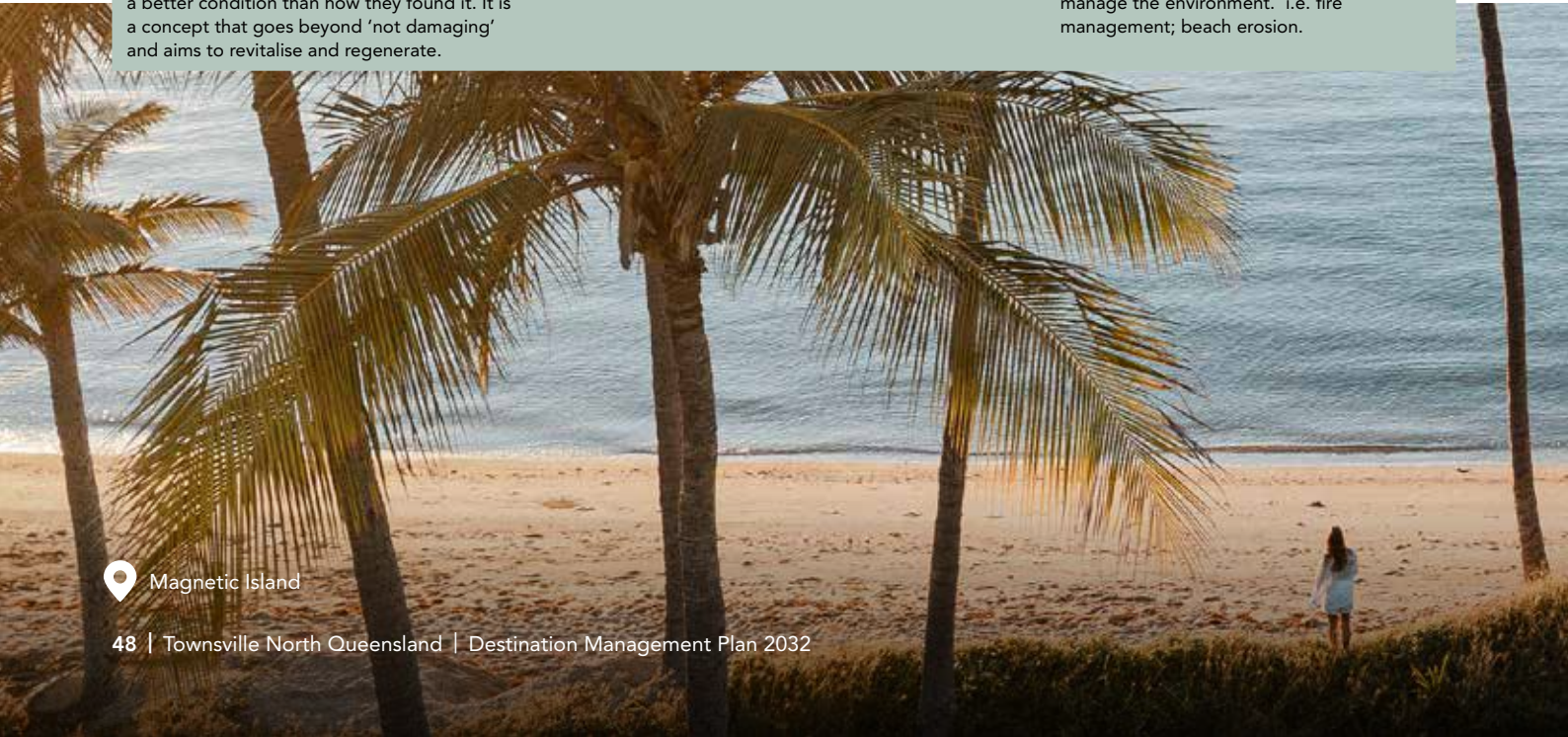
Appendix 2

7.1 EXPERIENCE DESIGN

7.1.1 HOLIDAY TRENDS AND OPPORTUNITIES

The following table explores the region’s alignment and opportunity horizon against the seven tourism trends identified by TEQ. This assessment is designed to contribute to the identification of six Tourism Game Changers.

TREND	TOWNSVILLE NORTH QUEENSLAND ALIGNMENT	EXPERIENCE OFFER OPPORTUNITY
Accessibility: 25% of global travellers have some form of accessibility need when travelling	Mandatory All elements of the Townsville North Queensland experience will focus on all accessible travellers	<ul style="list-style-type: none"> • Experience Development
The rise of the exploration traveller: an increasing market segment motivated to explore new destinations, to learn and experience new things about the world. The exploration traveller has a strong desire to immerse themselves in different cultures and ways of life. Indigenous, heritage and food experiences are sought out by this audience.	Very High Opportunity / Short Term Townsville North Queensland is well positioned to capture this traveller in the short term. As a remote, adventurous destination Townsville North Queensland offers accessible outback, World Heritage Rainforest, indigenous culture, remote islands, the GBR and authentic wildlife experiences away from the crowd.	<ul style="list-style-type: none"> ▶ Brand alignment ▶ Magnetic Island Master Plan and Koala Hospital ▶ Magnetic Island Koala Colony Experience ▶ Palm Island Indigenous Experiences? ▶ Hinchinbrook Island (iconic walk and expanded experiences) ▶ GBR diving including the Yongala Wreck Dive ▶ Townsville Cultural and Performing Arts Precinct ▶ Outer Reef Citizen Science Pontoon and Expeditions ▶ Outback to Islands Drive Journey ▶ Townsville / The Strand / Palmer Street Food and Drink Scene
Increase in desire for Adventure: travel restrictions and the dullness of life during the pandemic has resulted in a renewed desire for adventure, thrill seeking and fun experiences. The adventure traveller wants to meet new people, step outside their comfort zone and make the most of lost time. This traveller connects with remoteness and ruggedness.	Very High Opportunity / Short Term Townsville North Queensland is well positioned to capture this traveller in the short term. As a remote, adventurous destination Townsville North Queensland offers accessible outback adventure, MTB in wild nature, iconic scuba diving, big game fishing, remote islands and walks away from the crowds.	<ul style="list-style-type: none"> ▶ Magnetic Island Walks and Marine ▶ Hinchinbrook Island (walk and expanded experiences) ▶ GBR diving including the Yongala Wreck Dive ▶ Outer Reef Citizen Science Pontoon and Expeditions ▶ Outback to Islands Drive Journey ▶ Game Fishing ▶ MTB
Sustainability and Re-regenerative Tourism: Environmental sustainability is top of mind for many key markets, particularly Australia, UK and New Zealand. Sustainability is not only sought after but expected. Regenerative tourism is offering visitors the opportunity to have a positive impact on their holiday – leaving it in a better condition than how they found it. It is a concept that goes beyond ‘not damaging’ and aims to revitalise and regenerate.	Very High Opportunity / Short-Medium Term Townsville North Queensland is well positioned to transform its brand identity and associations towards programs and experiences in sustainable environments, research, innovation and conservation	<ul style="list-style-type: none"> ▶ Magnetic Island Master Plan / Eco Experience ▶ Townsville Waterfront Renewal Precincts ▶ Sustainability culture; Carbon neutral; Eco-Industrial Estate ▶ Aboriginal people sharing how to manage the environment. i.e. fire management; beach erosion.



TREND	TOWNSVILLE NORTH QUEENSLAND ALIGNMENT	EXPERIENCE OFFER OPPORTUNITY
<p>Indigenous Tourism: Indigenous experiences are relatively unknown and inaccessible to visitors to the region, however there is a significant untapped opportunity. However, research suggests visitors find great value in engaging with authentic experiences through an indigenous lens particularly when they sit within Australia’s natural strengths: natural environment, wildlife, coastal and agritourism.</p>	<p>High-Medium Opportunity / Medium-Long Term While indigenous tourism is operating in early stages of its development journey the medium to longer term opportunity is strong with walks, cultural precincts and island with the potential to grow experiences for visitors.</p>	<ul style="list-style-type: none"> ▶ Magnetic Island First Nations Experiences ▶ Outback to Islands Drive Journey ▶ Palm Islands First Nations Experiences ▶ Townsville Cultural and Performing Arts Precinct.
<p>Movement towards Wellness: Wellness and a focus on wellbeing has become a megatrend accelerated by COVID-19. Audiences are seeking opportunities to reset and re-centre and are looking towards destinations that are able to nourish their body, mind and soul. Wellness experiences like yoga, meditation, spas, fitness retreats are growing in popularity as a result.</p>	<p>Low Opportunity / Long Term Attracting the wellness traveller to Townsville North Queensland is a longer term opportunity. Magnetic Island and sites around the Wet Tropics Rainforest offer longer term potential.</p>	<ul style="list-style-type: none"> ▶ During the duration of this 2032 Plan the Townsville North Queensland region will no actively peruse the Wellness sector
<p>Focus on food and drink: The desire for culinary adventures and the opportunity to experience authentic cuisines and a kaleidoscope of flavours, textures and food stories is a key focus for the travellers of today.</p>	<p>Low Opportunity / Long Term The Agri-tourism opportunity is more challenging in Townsville North Queensland with larger commercial farms. While Townsville has a solid restaurant offering and local provenance partnerships are growing, positioning Townsville North Queensland through food is not recommended.</p>	<ul style="list-style-type: none"> ▶ Townsville food and drink scene ▶ Regional Agri-tourism.



 TOWNSVILLE
MAGNETIC  ISLAND

 BURDEKIN 

CHARTERS  TOWERS

~~HINCHINBROOK~~

PALM ISLAND GROUP

GREAT  BARRIER REEF


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