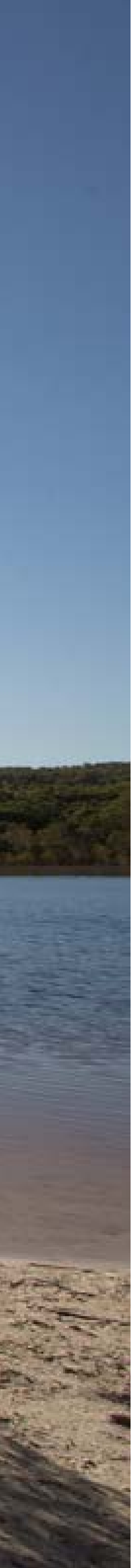
Redland CITY COUNCIL

Redland City

Tourism Strategy and Action Plan

2015 – 2020

This page: Brown Lake, North Stradbroke Island
On the cover: Point Lookout, North Stradbroke Island



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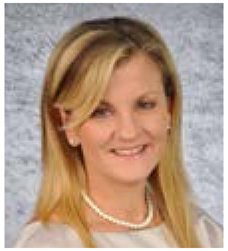


Message from the Mayor

Redland City is in a prime position to be showcased to the world through tourism.

Located just 35 minutes from Brisbane, Queensland's capital, and with easy access to the Port of Brisbane and Brisbane and Gold Coast airports, the Redlands has it all – villages, islands, rainforest, rural hinterland, farmland, beaches, bays, creeks and freshwater lakes as well as iconic flora and fauna.

In addition to our natural assets, we are proud of our community's culture and heritage, and this sense of pride is exchanged with our visitors.

A dynamic industry, tourism is identified as one of eight key growth sectors in the Redlands that can be used as a driver for socio-economic progress for this City.

It is critical that all Redlanders recognise the importance of tourism and how tourism spending breathes life into our City's economy.

With ongoing interest from international film production companies, our City clearly has something special to offer. This global interest is certainly helping to put Redlands on the map and is something we need to capitalise on.

Tourism provides a more prosperous job market for locals and bolsters our economy through increased visitation.

Council is working hard to enable the Redlands tourism industry to find its own collective voice and destination identity. Yet Council alone cannot be held responsible for growing a sustainable Redlands' tourism industry.

It is important for tourism industry operators across the City to work collaboratively to diversify and package products and offerings in order to capture market share and create destination appeal.

Through public and private investment of knowledge and resources we can create an even better Redland City – a unique place that offers world-class facilities, festivals and events and much, much more for the enjoyment of visitors and residents alike.

This *Redland City Tourism Strategy and Action Plan 2015 – 2020* is the local tourism industry's blueprint for the future. It is informed by stakeholder feedback and market trend assessment to provide an overview of current visitor trends and a clear direction of where the Redlands should be encouraging new business product and related infrastructure investment.

It sets out how the tourism industry and Council can work together to seize opportunities in tourism investment and development, destination marketing and events as well as supporting infrastructure and coordination.

The aim is to bring more visitors to the Redlands, tempt them to stay longer and spend more and, importantly, raise the profile of the Redlands as a must-see destination.

The Tourism Strategy gives the industry ownership of its future by creating a subcommittee that is representative of all areas of the City.

The tourism subcommittee will work closely with Council and the tourism representative on the Redlands Economic Development Advisory Board.

The intent is that in the medium-term, the tourism subcommittee could become the local tourism organisation for the Redlands.

Everyone has a role in ensuring the Redlands enhances its reputation as the best place to live, play and do business.

We want all visitors' time spent in our community to be memorable – and for them to return again and again.

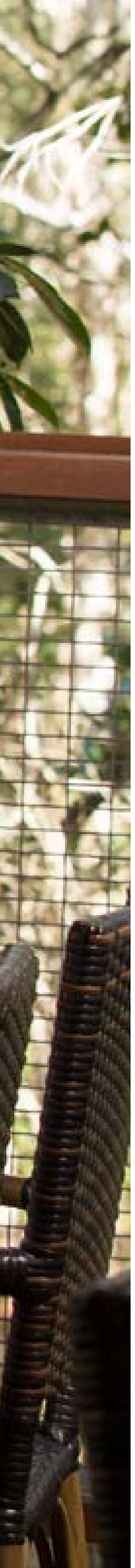
Working together this will occur.

KWilliams

Cr Karen Williams

Mayor of Redland City

Redlands IndigiScapes Centre, Capalaba



Introduction

Redland City Council (Council) has developed a new Tourism Strategy for the period 2015 – 2020 and a five-year Action Plan to support the Tourism Strategy.

The purpose of developing this Tourism Strategy is to provide:

- an assessment of the Redlands tourism economy, its opportunities and challenges
- a strategy that identifies tourism-focused initiatives which, with industry involvement, can be implemented
- a five-year action plan that outlines how recommendations from the strategy could be activated, with involvement from the Redlands' tourism sector stakeholders, which is integral to achieving those actions
- a recommended tourism model to show how tourism could best operate with Council's involvement as an enabler of marketing, new product development and investment.

When developing this Tourism Strategy and supporting Action Plan, the key requirement of Council – and industry stakeholders – has been to focus on tangible outcomes within a realistic timeframe rather than an exhaustive list of items that may not be achievable.

Council commissioned The Stafford Group to assist in developing the documents.

The process used to develop these documents involved the following:

- face-to-face industry consultation to review product, meet with operators, Councillors and Council officers as well as assess new opportunities
- liaison with industry operators i.e. accommodation operators, food and beverage providers, farm operators and attraction operators
- structured meetings with Councillors and Council officers to discuss the vision for tourism, infrastructure, development and interrelationship with operators
- an ongoing literature review to build a quality context for the Tourism Strategy and to fully understand projects and strategies as well as relevant government policies affecting the Redlands
- preparation of a draft Tourism Strategy and Action Plan, primarily to highlight key issues and opportunities that need to be considered by Council in particular
- finalisation of the draft Tourism Strategy and Action Plan after feedback and liaison with Council and industry operators.

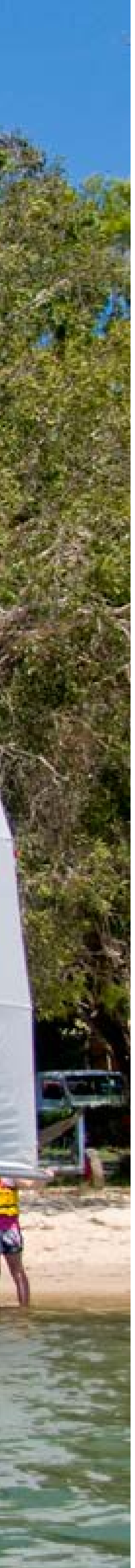
This *Redland City Tourism Strategy and Action Plan 2015 – 2020* recognises the strength of the Redlands as a scenically attractive region, but also notes the need to advocate for and develop far more commissionable tourism product, which could lead to more tourism investment and wider economic benefits such as employment for local young people.

The *Redland City Tourism Strategy and Action Plan 2015 – 2020* will be at the forefront of Council's tourism planning, policies and strategies as well as the tourism industry's own plans for the next five years.

Tourism has been identified as one of eight priority industries in the *Redland City Economic Development Framework 2014 – 2041*. Tourism currently accounts for 1.4% of Redlands' Gross Regional Product. By 2041, it is expected that tourism will contribute to more than 3% of Redlands' Gross Regional Product.

As a living document, the *Redland City Tourism Strategy and Action Plan 2015 – 2020* will be reviewed by the Economic Development Advisory Board.

Macleay Island



Strategic links

The *Redland City Tourism Strategy and Action Plan 2015 – 2020* has been developed in consideration of – and aims to leverage – from the following:

- *Redlands 2030 Community Plan: Creating Our Future*: a plan to achieve the Redland community's vision for the future. It was developed by more than 3000 community members, business people and local organisations and was supported by Redland City Council staff and elected representatives.
- *Redland City Council Corporate Plan 2015 – 2020*: guides the development of Council's Operational Plan and Budget. The Corporate Plan's structure, its underlying values and overarching mission of sustainability (of our diverse places and strong communities) is strongly informed by the Community Plan.
- *Redland City Council 2015 – 2016 Operational Plan*: sets out the work Council plans to do to contribute to the Corporate Plan and the Community Plan.
- *Redlands Planning Scheme*: currently being reviewed to update it for 2015 and beyond. This blueprint for the future development of the city will be known as '*Redland City Plan*'.
- *Redland City Economic Development Framework 2014 – 2041*: a framework designed for business and to be driven by an Economic Development Advisory Board, giving business a central role in the future economic growth of the city. Tourism (Accommodation and Food Services) will be represented on the Board.
- *Redlands – Open for Business and Investment*: a snapshot of Redlands' demand drivers for business including demographics, industry profile and projected investment trends.
- *Redlands Transport Plan 2016*: a 15-year integrated transport strategy for developing sustainable transport systems in the Redlands.
- *Mainland Boat Ramp Study 2004*: outlines short-term and long-term infrastructure requirements for public boat ramps (and associated facilities and supporting infrastructure) to provide appropriate services for community access to Moreton Bay.
- *The Queensland Plan*: a plan created by Queenslanders for Queensland that provides a 30-year roadmap for the state's growth and prosperity.
- *Destination Success: the 20-year Plan for Queensland Tourism*: a plan that outlines how the tourism industry in Queensland can be competitive and successful in the long term as well as increase visitor expenditure to $30 billion by 2020.
- *2014 DestinationQ Forum Final report and 2014 DestinationQ Forum Communique*: outlines four key areas identified at a state tourism forum to develop tourism across the state.
- *The Future of Tourism in Queensland (2013)*, CSIRO (on behalf of the Queensland Government) – outlines global megatrends creating opportunities and challenges that will affect tourism over the coming 20 years.
- *Setting the Direction for the China Market 2012 – 2016*: a Tourism and Events Queensland directions paper to maximise the benefits for Queensland from growing the China market in a sustainable way in partnership with the wider tourism industry and government.
- *Queensland Cycle Strategy 2011-2021*: a Department of Transport and Main Roads strategy that sets the direction for cycling to get more people on bikes for school, work, leisure and shopping trips.
- *Brisbane Visitor Economy Strategy - A Destination Tourism Plan for Brisbane 2014 – 2020*: underpins the partnership of Brisbane's tourism industry, Greater Brisbane councils and the Queensland Government and the shared commitment necessary to meet the goal of growing the value of the industry from $4.8 billion to $8.4 billion by 2020 and creation of 80,000 full-time equivalent employment opportunities.
- *A Way Forward for Queensland VICs*: a directions paper produced by Tourism and Events Queensland that captures future thinking about the role of accredited visitor information centres (VICs) as information providers and to inform decision-making by VIC owners, managers, the Queensland Information Centres Association and other VIC stakeholders.
- *South East Queensland Regional Plan 2009 – 2031*: a statutory regional plan that is currently being reviewed.
- *Redlands Rural Futures Strategy 2013*: a report noted by Redland City Council that includes information on the rural economy and uses of rural space in the Redlands.

Raby Bay Harbour, Cleveland

Tourism in the Redlands – a snapshot

Location

Redland City (the Redlands) is a local government area of South East Queensland, located approximately 35 minutes drive or 26km from the Brisbane CBD.

The Redlands covers an area of 537 square kilometres and is spread along the southern coast of Moreton Bay. It has an estimated resident population of 147,000 individuals, with the majority residing in the suburbs of Alexandra Hills (16,700), Capalaba (16,600), Cleveland (14,400) and Victoria Point (14,800).

Suburbs that have experienced strong population growth over the period 2001 – 2011 include Redland Bay, growing from 6800 residents to 13,600 residents (98% growth), Thornlands, increasing from 7300 to 12,800 (74% growth) and Victoria Point, growing from 12,000 to 14,800 (23% growth) (*Redland City Community Profile, 2015*).

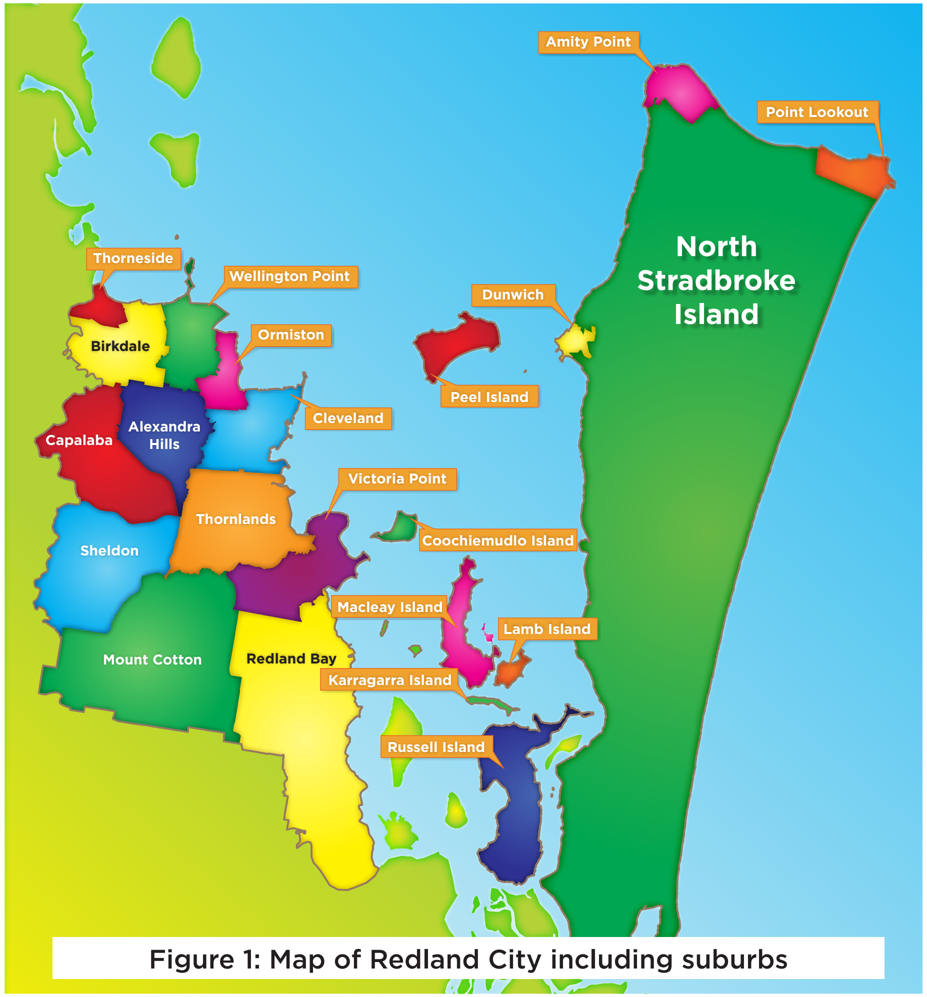


Figure 1: Map of Redland City including suburbs

Market trend assessment

An assessment of global, national, state and regional trends that may currently – or could in the future – impact the Redlands' ability to sustainably grow tourism has been undertaken. To align with State Government planning, the same megatrend categories that were outlined in *The Future of Tourism in Queensland (2013)* have been used. These include:

- **The orient express** – The world economy is shifting from west to east and north to south. This is creating new markets and new sources of competition.
- **The lucky country** – Queensland is a wealthy but expensive destination to visit. The challenge will be to show the "worth it" factor and fetch a price premium.
- **On the move** – Transportation technology will see a continued increase in human mobility. The motivators for travel will also strengthen.
- **Digital whispers** – People are changing the way they access and trust information in an online world.
- **Bolts from the blue** – Climate change and infectious disease outbreaks combined with safety concerns will have increased impact.
- **Great expectations** – Tourists of the future will have expectations for authentic, personalised and friendly experiences.
- **A natural advantage** – In a world where ecological habitats are disappearing, the unique natural assets of Queensland will become a stronger drawcard.

While some of these trends and their implications are similar at a state and local government area level, several have also been included that are viewed as specifically impacting on the Redlands.

Macleay Island artists at work

The Orient Express

Tourism continues to grow internationally

Globally, tourism has grown significantly. The United Nations World Tourism Organisation *Highlights Report (2014)* research highlights:

- constant growth in all tourism sectors including leisure, business, conferencing, visiting friends and relatives, MICE (meetings, incentives, conferences and exhibitions), education trips, food tourism, cruise and special interest markets
- the growing number of destinations worldwide that have recognised that tourism can be a key driver of socio-economic growth via export revenues, the creation of jobs and enterprises and infrastructure development. Tourism has become one of the largest and fastest growing economic sectors globally, with many new destinations emerging in addition to the traditional destinations of Europe and North America
- despite occasional shocks, international tourist arrivals have demonstrated almost uninterrupted growth, increasing from 25 million in 1950 to 278 million in 1980, 528 million in 1995, and 1.09 billion in 2013 – a growth of 291% (or 809 million tourist arrivals)
- Asia and the Pacific (including Australia) recorded the strongest regional growth, with a 6% increase in arrivals. Based on United Nations World Tourism Organisation forecasts, Asia and the Pacific are expected to continue to experience the strongest growth, albeit from a smaller base.

Even with the recent global financial crisis, worldwide tourism figures overall have reflected growth.

City-based market segments constantly look for new day trip and overnight destinations.

The development of new visitor experiences and activities in the Redlands can pick up on the major urban conurbation of South East Queensland's desire for new and easily accessible experiences (particularly because there has been minimal new tourism product created in and around South East Queensland for some time).

Implications for the Redlands

While tourism is not recession proof, it is far more resilient than other economic sectors, as visitor markets often view tourism and travel as a necessity rather than a luxury. This equates to more day trippers coming to visit areas such as the Redlands to escape city-based areas and the Redlands being well located to capitalise on these day tripper needs. To capture this visitor market, there is a need to ensure suitable product exists (including free and pay-for experiences). The packaging of this product with accommodation, food and transport options is also important.

Changing cultural and entertainment tastes of Chinese tourists

Traditionally, Chinese tourists have travelled internationally on highly structured tours. As this market has matured, so has the need for new experiences that they can undertake in smaller groups (mini bus sized special interest tours) and as family groups (using rental cars to explore).

The desire now exists to travel as free independent travellers and without venturing too far from major gateway cities such as Brisbane and the Gold Coast.

The Redlands is geographically well located to pick up on this changing market need especially as this maturing market wants to undertake day trip tours from Brisbane. The Chinese inbound market to Queensland is the largest international visitor market for Queensland, with an estimated 309,000 visitors travelling to Queensland in 2014 (September Year Ending). It is a significant visitor market with high upside growth potential.

Implications for the Redlands

To capture a greater share of the Chinese visitor market there is a need to ensure the Redlands is "China ready" and aligning with the Tourism and Events Queensland China tourism strategy – *Setting the Direction for the China Market 2012 – 2016*. Being "China ready" involves a whole-of-industry approach, from Mandarin speaking tour guides and hotel reception staff, translated signage and maps, the development of quality packaged tours and experiences including more traditional structured tours and those for the growing free independent traveller (FIT) market. While it is not anticipated that the Redlands will target and market to the Chinese tour market directly, the Redlands should focus on leveraging off any marketing programs that are developed by Brisbane Marketing and Tourism and Events Queensland. There will be a subset of the Chinese visitor market looking to undertake experiences outside of Brisbane. The Redlands, located next to Brisbane, is ideally placed to capture this market.

Growth from Asia

Queensland is experiencing an increase in visitors coming from Asia (particularly China, India, Indonesia and Malaysia) but many destinations are not yet ready with product or service standards to capitalise on this growth potential.

These visitors, coming in increasingly larger numbers, are not just after the city-based experiences that Brisbane and the Gold Coast can offer but are looking for unique coastal areas to visit.

The following table highlights the top 10 international visitor markets into Brisbane and the Gold Coast and demonstrates the strength of emerging countries from Asia. The Gold Coast has been included because it has an international airport and feedback has indicated that a number of visitors travel from the Gold Coast into the Redlands.

Table 1: Top 10 visitor source markets – Brisbane and Gold Coast

Brisbane			Gold Coast		
Rank	Country	Number	Rank	Country	Number
1	New Zealand	164,000	1	China	187,000
2	China	131,000	2	New Zealand	185,000
3	United Kingdom	116,000	3	United Kingdom	60,000
4	United States of America	62,000	4	Japan	56,000
5	Germany	48,000	5	Singapore	42,000
6	Taiwan	33,000	6	Malaysia	31,000
7	Hong Kong	30,000	7	United States of America	28,000
8	Korea	28,000	8	India	22,000
9	Singapore	28,000	9	Hong Kong	20,000
10	Canada	26,000	10	Korea	19,000

Source: *Gold Coast Regional Snapshot (Year Ending June 2014) and Brisbane Regional Snapshot (Year Ending June 2014), Tourism and Events Queensland.*

Implications for the Redlands

The Redlands, being close to Brisbane and the Gold Coast, could start to develop day tours for these visitors (this is obviously dependent on the product able to be created). Simple activities such as fishing, cycling, fruit picking and kayaking could have strong appeal to a number of these international visitor markets who may only visit as day visitors, preferring to stay in city-based accommodation. Introduction of purpose-built Asian style restaurants to offer modern and appropriate food options, possibly in a highly attractive rural or coastal setting, may help grow the day visitor market and also generate investor interest. Supply of appropriate product has to drive demand from these Asian markets that are high yielding for the right product. These markets also tend to bring investor interest with them.

Kayaking in Moreton Bay


Horseshoe Bay, Peel Island

A growing middle class

Greater prosperity, not only within Australia, but internationally, is rapidly growing visitor markets with the disposable income required to go travelling. After visitor markets check off the major local destinations that are currently heavily promoted (Gold Coast and Sunshine Coast), they tend to go looking for the next level of visitor experiences. Domestic and international visitors tend to want to explore and the safer the destination, the greater the desire and comfort in doing so.

Implications for the Redlands

As long as the Redlands has the products to entice the domestic market who are looking for new passive and active experiences and new events, it can benefit from this growing cohort of mostly domestic visitors looking for new experiences within easy access of Brisbane, the Gold Coast as well as the Sunshine Coast. The Redlands needs to be mindful, however, that competition is intense for capturing the domestic market in particular, especially those interstate visitors basing themselves at the Sunshine Coast or Gold Coast and looking for day trip excursions. The low hanging fruit currently for the Redlands is to target the local market from South East Queensland looking for different experiences to undertake. As the product mix in the Redlands grows, the opportunity exists to grow the focus to target a larger cohort of interstate and international visitors.

New competition – developing countries are heavily investing in tourism

The challenge for Australia is that the level of competition from developing countries to attract tourists is intense and the level of investment occurring is significant. From work undertaken throughout South East Asia and the Pacific, it can be seen that many countries are recognising the importance of the tourism sector in its economic growth and are increasing their investment in the sector.

Implications for the Redlands

While growing tourism investment and reducing barriers to investment is more of a national and state issue, for the Redlands to be far more competitive as a tourist region within Australia, encouraging new tourism product and infrastructure investment is crucial. From work undertaken in the surrounding regions throughout Brisbane and South East Queensland, it is noted that most councils are actively looking to encourage investment and development into new and improved facilities in order to grow their share of visitor numbers and, more importantly, visitor yield. The Redlands must therefore look to introduce tourism product (new accommodation, attractions/experiences and supporting infrastructure) to strengthen its competitive position to better meet the needs of specific markets. On a national and state level, without new investment occurring into new tourism product within Australia to attract local, intrastate, interstate and international visitors, visitor growth opportunities are likely to be slow to eventuate. Currently, Australia has slipped behind most Asian destinations in the level of new tourism product on offer.

Youth market – more mobile with more wealth

Of all visitors to Australia in 2014, an estimated 592,000 (9%) were backpackers. This is an increase of 8000 visitors (2%) on the previous year.

More than half of these visitors to Australia (56% or 333,000) visited Queensland (*International Visitors, Visitor Nights and Regional Expenditure by State/Territory visited (Year Ending September 2014), Tourism Research Australia*).

Tourism Research Australia data also demonstrates that:

- of the backpackers visiting Queensland, 124,000 trips were to the Gold Coast, 208,000 trips were to Brisbane and 254,000 trips were to regional Queensland, which is significant
- in 2014, backpacker expenditure represented a significant 55% of total regional visitor expenditure within regional Queensland, 32% of regional spending in Brisbane and 14% of regional spending
- in Australia, the majority of backpacker spend was on 'food, drink and accommodation' (38% of total backpacker expenditure, followed by 'pre-paid international airfares' (19%) and organised tours and education fees at 5% each (*Total Expenditure by item of expenditure, for International visitors - Backpackers and Non-Backpackers (Year Ending September 2014), Tourism Research Australia)*.

Globally, trends are indicating that the youth market (under 25s) is growing. This includes backpackers, school-based excursions, school exchanges and younger people travelling with more confidence as they leave school or during their university holidays or work breaks. These younger travellers have often benefited from the experiences their parents have given them and now have a taste for better quality dining, accommodation and activities/attractions.

In Queensland, international backpacker visitation since 2006 totalled between 250,000 to 300,000 visitors per year and visitor nights ranged from 4.2 million to 5.3 million (*The Future of Tourism in Queensland, 2013*). In recent years backpacker numbers have declined slightly but there are no discernible longer term trends. The value of the Australian dollar relative to the US dollar and the Euro may be a key driver of future growth as there is a clear correlation between the rise of the Australian dollar and a decline in backpacker numbers.

Implications for the Redlands

The Redlands can capitalise on this youth market providing it can supply the active pursuits this segment is often looking for. For the short to medium-term, this may mean focusing on potential new activities associated with paddle boarding, quad biking, kayaking, mountain biking, outdoor dining options, small yacht charters and other passive and active pursuits. The youth market has often benefited from travel and holidays traditionally funded by parents. This has led to generations (Generation Y and Generation Z) who do not wish to go without the experiences that their parents exposed them to. More disposable income is therefore applied by this sector of the market to travel. The Redlands would need to create the product opportunities for this sector to produce sufficient brag value to attract them. To capture the backpacker market already travelling to Brisbane and the Gold Coast, an opportunity exists to package existing and new product and to market these at hostels in both locations. The packages could include transport options for getting to the Redlands, low cost but quality accommodation, food and beverage and experiences that can be undertaken over two-to-three days.


The Gorge Walk, North Stradbroke Island

Older age groups have different preferences to other age groups

With Australia's ageing population, it is important to understand the impact this market will have on tourism in the future and the preferences that this market has when travelling domestically. Common traits/preferences include (but are not limited to):

- typically, those that have exited the labour force tend to have relatively long trips at relatively low expenditure levels per night
- a relatively high proportion stay in caravan parks or commercial camping grounds and they are more likely to undertake cultural and heritage activities, visit local attractions as well as visit friends and relatives. In terms of activities enjoyed while on holidays, eating out has become more popular with this age group over recent years.

Implications for the Redlands

The Redlands should be able to offer greater appeal to older age groups (often coming on tour buses such as Probus clubs) looking for passive-based experiences and who are keen to use ferry services to the islands. Offering coastal walkways and picnic sites are important elements of infrastructure to also appeal to these older visitors.

The lucky country

The increasing cost of visiting Australia

The relative strength of the Australian dollar against some generating markets currencies i.e. most South East Asian generating markets make travelling to Australia expensive. Online travel blogs including *YTravel.com*, *Traveller.com.au* and *Lonelyplanet.com* indicate that Australia is a "premium destination that comes with a price tag".

Implications for the Redlands

The Redlands needs to be as value-driven as possible. Consumers will continue to look for value-adds being offered to make packages more attractive. Additionally, it is important that the Redlands ensures the quality of the product it is offering matches the price being charged. Those visitor markets looking for a premium experience often do not mind paying a higher price as long as the price matches the quality. Currently, the Redlands has five-star natural attributes but lacks the same level of quality of built facilities to promote to a variety of higher spending domestic and international markets. Undertaking quality audits and educating operators on national and international quality standards is desirable for the Redlands.

Overseas holidays are getting cheaper

With increasing low-cost carrier flights from Brisbane and the Gold Coast, there is increasing competition from Asia and Pacific Island destinations to lure the domestic market offshore, even for short breaks (three-to-four days). What many of these destinations are doing is offering holidays that are completely packaged (flights, accommodation, transfers, food and activities). This is seen as highly appealing for the short break outbound market that is often time poor and looking for an all-inclusive package.

Implications for the Redlands

Redland operators need to remain value driven and look for value added components to offer in order to be competitive. Identifying and promoting inclusive package deals will also assist the Redlands to become more competitive and attractive in a broader domestic market as well as to locals from South East Queensland.

Ormiston House, Ormiston

Point O'Halloran

The effect of holiday budgets on holiday destinations

The Future of Tourism in Queensland (2013) report highlighted a number of trends surrounding the effect of holiday budgets on holiday destinations, including (but not limited to):

- a report in 2008 found that travel and holidays are one of the most expensive items purchased regularly by households globally and represents a significant proportion of the total household budget (*Twenty years on and 10 years after the Internet: The state of eTourism research (2008)*, *Dimitrios Buhalis and Rob Law*)
- when given the opportunity, Australians preferred to travel overseas for a holiday as opposed to visiting domestic destinations as they considered it better value.

Many Australians favour overseas holiday destinations that appear to be more exotic, are only marginally more expensive to undertake, offer something unattainable at home, offer better service standards and have better quality facilities.

Implications for the Redlands

While this trend has implications on a national level, to remain competitive in the interstate and intrastate visitor markets the Redlands needs to focus on offering more up-to-date product that matches consumer demand, higher service standards and better quality infrastructure in the form of coastal walkways, cycle ways, integrated ferry hubs with supporting cafés, bars and restaurants.

Staffing challenges

Increasing challenges in attracting and keeping semi-skilled and skilled staff and the impact of penalty rates during weekends and in the evening on business viability are major challenges for most operators.

The lack of adequate service standards is a nation-wide problem and many operators are finding it easier to fill staff vacancies with those coming on working holiday visas that have better customer service skills than local workers.

Implications for the Redlands

The Redlands needs cafes and retailers open, especially during weekend periods when events are on and visitors are looking to spend. Working with TAFE Queensland and other education providers to help provide tourism and hospitality traineeships and apprenticeships needs to be considered. The Redlands needs to be vigilant in ensuring that tourism and retail operators are providing good quality customer service and taking advantage of the numerous Queensland and Australian Government training and upskilling programs that are available.

On the move

Cruise ship numbers on the rise

The cruise industry globally is booming and is being reported as "the fastest growing segment of the travel industry" (*The Global Cruise Boom, P&O Cruises, www.pocruises.com.au/aboutus/news/pages/theglobalcruiseboom.aspx*). Sustained growth is anticipated globally, spurred on by larger cruise ships that are able to cater for greater numbers of passengers.

From 2013–2015, the number of cruise ships scheduled to arrive in the Port of Brisbane grew by 23%, increasing from 112 arrivals to 145 arrivals (*Cruise Liner Schedules from the Port of Brisbane, http://www.portbris.com.au/*).

The widening of the Panama Canal and industry focus on the South West Pacific creates potential for significant cruise ship growth in Australia, providing the infrastructure exists to match the demand. This market is also highly seasonal, coming from October-March because of the northern hemisphere winter.

Implications for the Redlands

As the Redlands is close to Brisbane and the Gold Coast, it has the potential to link into land-based tours offered by cruise ship companies. Offering day tour companies a cluster of experiences that are able to be undertaken in the Redlands (walks and cycle trails, art trails, food and beverage experiences, food trails and events) and packaging these up for promoting to the tour companies would be required. It is important to note, however, that there is intense competition for these cruise visitors as they are often very high spending visitors. In many instances, land-based tours for cruise passengers are short and require a highly focused tour to a cluster of activities/ experiences over a two-to-three hour period before passengers are brought back to the vessel to dine. The Redlands should also investigate linking with neighbouring regions to offer a mix of complementary product options. This approach is also useful for growing partnerships to share the risks and the benefits.

A holiday while studying

According to *The Future of Tourism in Queensland (2013)* report, international students make a contribution to tourism by visiting places of interest, purchasing souvenirs, undertaking casual work in hospitality and visits by friends and relatives. It is estimated that each overseas student taking a course in higher education was visited by an average of 1.3 people during the course of their stay, generating $1.2 billion each year for the Australian economy.

Implications for the Redlands

The Redlands might not have large university campuses but it can easily offer recreational pursuits for students studying in nearby areas and visiting family members to enjoy. These visitors are often motivated by short break holidays that are able to be packaged up, enabling them to travel during free time on weekends and university holidays. Asian students in particular are after safe destinations to travel to – something that the Redlands is able to offer and should promote when packaging products and targeting these students.

Bicycles and tourism

Globally, cycling as a mode of transport and tourism activity has experienced strong growth, which is anticipated to continue into the future. This growth is demonstrated by:

- works on the EuroVelo network, a cycle route in Europe that is estimated to handle 45.2 million trips and generate 5 billion Euros per annum. Once completed (estimated for 2020), the route will provide a network of high-quality cycling routes that connect the whole of Europe (*http://www.eurovelo.org/*)
- expenditure in the New Zealand bicycle tourism sector is anticipated to double from 2009 levels to around $640 million (New Zealand dollars) per year with the creation of a national mountain biking trail through both the North and South islands at a cost of $56 million (New Zealand dollars). Australians are also rapidly increasing their use of bicycles as a mode of transport (*The Future of Tourism in Queensland, 2013*)
- in Queensland, 134,200 people use bicycles to travel to/from work and travel to non-study destinations i.e. a trip to a café (*Queensland Cycle Strategy 2011-2021*)
- as part of the Queensland Government's recognition of the strength of cycling tourism, the State has invested $8.8 million and developed three regional recreation trails including two biking trails being the Brisbane Valley Rail Trail and the Boonah to Ipswich Trail.

Implications for the Redlands

The Redlands, with its quality natural environment and ideal topography, could provide a series of cycling trails (both street circuits and mountain biking) to capture this growing market. This could include the development of a cycling event. When developing trails, it is important that the length, approximate time to complete the trail and the level of intensity of the trail is visible for all participants.

Cleveland

Digital impact

Internet usage continues to grow

Increasingly, tourists are booking their holidays online as opposed to the more traditional methods of telephone and booking in person. Research indicates:

- 49% of Britons booked a holiday overseas online in 2013 (*ABTA reveals online holiday booking habits, ABTA, http://abta.com/news-and-views/news/abta-reveals-online-holiday-booking-habits*)
- Roy Morgan research indicates that the internet has become the most popular method used by Australians to book a holiday, with 39% of Australians booking their holidays online (*Increasing use of the Internet to book a holiday, 2010, Roy Morgan Research*)
- similar research undertaken in 2011 (one year after the Australian research) by Roy Morgan indicates that 41% of New Zealanders used the internet or email to book their last holiday or leisure trip (*Increasing percentage of New Zealanders book holidays through the Internet, 2011, Roy Morgan Research*)
- Australians still favour making bookings directly via individual supplier websites, such as individual hotels and bed and breakfasts with research indicating that 82% of online bookings in Australia in 2013 were made directly via supplier websites (*Tourism series, part 1: six online trends shaping travel and tourism, 2014, https://www.securepay.com.au/insights/articles/travel-and-tourism-six-online-trends-shaping-the-industry*)
- in the United States of America, 39% of travel bookings in 2011 were made online (*US online travel market share stalling and suppliers rule, Tnooz, http://www.tnooz.com/article/phocuswright-us-online-travel-market-share-stalling-and-suppliers-rule/*).

These trends are expected to continue, with individuals booking online for a range of reasons including (but not limited to): the ease of doing so, the ability to shop around for more economical options, the ability to read reviews of product, particularly accommodation as well as the packaging opportunities that are available.

All trends further emphasise the need for an online presence for tourism destinations, particularly including an online presence that is the "face" of the destination. This ensures that while some operators within a destination may be struggling to get their business "online", they are still able to have some exposure via the destination website.

Furthermore, this growing use of online booking facilities and using the internet to research destinations means that social media is becoming increasingly important for driving awareness of a destination. A recent European study indicated that more than 69% of travellers used travel review websites as their primary source of information for planning travel (*Trust Online – Study on Online Hotel Reviews, http://www.european-consumer-summit.eu/2014/doc/Hotel%20On-line%20user%20reviews_Workshop%20discussion%20document.pdf*).

Implications for the Redlands

There is a need for the Redlands to ensure it not only has a destination website in place but also a social media strategy to manage, on a daily basis, the marketing exposure of the Redlands as well as online feedback. Negative feedback on TripAdvisor, Yelp, Facebook and other travel-related websites can quickly impact on businesses and even destinations. The Redlands needs to take advantage of increased and improved information flows to use visitors as a marketing tool to encourage others to visit by effective word-of-mouth advertising. This will also require ongoing improvements in service standards to better deliver to all visitor market segments. Continuing into the future, it is important that all tourism operators within the Redlands are encouraged to introduce an online presence. This could include linking into the proposed Redlands destination website or using OTAs (online travel agencies) to promote their product. The product audit that was undertaken as desktop research as part of this Tourism Strategy revealed the challenge associated with old websites is that either they have not been updated because the business is no longer operating (but based on their web presence, they appear to be operating) or the business owners are lacking the expertise required. As a result, visitors are given a false impression of what is and is not available within the Redlands region. Websites not well maintained will quickly turn off potential visitor interest. The Redlands needs to focus on a strong, accurate and reliable online marketing and promotional presence to encourage a broad visitor base. Any focus on visitor services needs to be heavily weighted toward online activity and away from traditional bricks and mortar style visitor information centres or similar facilities.

Increased internet usage on smart phones

While not currently the main medium that is used to make online bookings (desktop computers and laptops are currently number one), there is a growing trend of smart phone and tablet usage for online bookings, with more than 40% of travel bookings in the United States of America in the first half of 2014 being undertaken on mobile devices. This was up 20% for the same period in 2013 (*The travel industry is booming on smartphones as mobile bookings hit 40 percent, VB News, http://venturebeat.com/2014/09/19/travel-bookings-by-mobile-devices-in-u-s-now-at-40-percent-and-growing-report/*).

Global research indicates that by 2017 mobile devices are forecast to account for more than 30% of online travel value sales globally (*Australia-New Zealand: OTAs Steal Share of Supplier-Dominated Online Travel Market, http://www.phocuswright.com/Travel-Research/Research-Updates/2013/Australia-New-Zealand-OTAs-Steal-Share-of-Supplier-Dominated-Online-Travel-Market#.VRIyKvmUcYE*).

Therefore, there is a growing expectation by visitors globally to be able to access information, maps, brochures, booking facilities and self-guided tours via a smart phone app or smart phone accessible website.

Implications for the Redlands

There is a need for the Redlands to either develop their own smart phone application or mobile accessible website, or, link in closely with that developed by Brisbane Marketing. It is interesting to note that while the move to mobile travel bookings is proven, generally this applies more to booking local trips rather than more expensive overseas holidays. This is important as it demonstrates the need for the Redlands to link closely with Brisbane to become a "must do" day trip and, over time, develop this into overnight experiences.

Sources of visitor information

The increasing use of the internet for researching and booking travel is correlated with a decline in the use of visitor information centres throughout Australia.

Research indicates that, on average, visitor information centres tend to only capture five to 15% of the visitor market into a destination, leaving 85% of the market to be serviced through other means. Additionally, out of 23 visitor information centres recently assessed throughout Australia and New Zealand, the average annual operating loss is close to $200,000 per annum. Often, council's dedicate a large majority (or all) of their tourism budgets to the running of a visitor information centre.

Implications for the Redlands

The question being posed currently by many councils is around how they can better spend their tourism budgets to cater for a larger proportion of visitors and to better service the bulk of their visitors, rather than a small percentage. The Redlands needs to re-evaluate its current investment into visitor information services (and specifically, its visitor information centre) to maximise its return on investment.

Bolts from the blue

Australia is a relatively safe tourist destination

Australia continues to be viewed as a relatively safe tourist destination, with the country being virtually free of all life-threatening tropical diseases. Furthermore, Australia has comparatively fewer transportation incidents when compared with some other countries and lower crime rates (*Intentional homicide count and rate per 100,000 population, by country/territory (2000-2012), Vienna, Austria: United Nations Office on Drugs and Crime, UNODC*).

Research undertaken by Tourism Australia on Australia's international visitor market (United States of America, New Zealand, Singapore, Malaysia, Korea, Japan, China, India, Germany and the United Kingdom) found that one of the primary factors that influences choosing a holiday destination is whether it offers "a safe and secure destination" (*Australia Consumer Demand Research, Australia Tourism Summit 2013, Tourism Australia*).

Implications for the Redlands

The relevance of Australia being a safe tourist destination will grow significantly over time. The Redlands needs to be positioned to take advantage of Australia's low-risk status. Offering safe coastal areas (beaches) and attractive and safe bushwalking and coastal walkways as well as quality purpose-built cycle paths will help position the Redlands as a safe and attractive destination with broad appeal.

Wellington Point

North Stradbroke Island

Great expectations

An increasing desire for authentic experiences

United Nations World Tourism Organisation (UNWTO) research indicates that visitor markets are searching for more genuine and authentic experiences, combined with outdoor activities to stimulate both mind and body. Additionally, the global interest in the environment has increased the desire of visitors to experience outdoor attractions, and the aspiration for a healthier lifestyle has encouraged visitors to seek more active experiences while travelling (*UNWTO Capacity Building Workshop, Adventure Tourism - http://themis.unwto.org/event/application-unwto-capacity-building-workshop-adventure-tourism-understanding-and-developing-sa*).

Implications for the Redlands

The Redlands should promote the outdoor experiences that the local government area has on offer, including local beaches, development of a mainland foreshore walk, inclusion of additional marine infrastructure to encourage more water-based activity and linking these experiences with food and beverage and accommodation offerings. There is also an opportunity to package and grow the day spa/wellness centre products that already exist in the Redlands.

Friends and relatives are an important motivation for domestic visits

The visiting friends and relatives (VFR) market is an important visitor market for Queensland, representing 22% of all international visitation (*International tourism (a)(b): Number of visitors and visitor nights, by main reason of visit, Qld, 2005–06 to 2013–14)* and 37% of all domestic visitation to Queensland in 2014 (*Domestic Tourism Snapshot (Year Ending June 2014*), *Tourism and Events Queensland*).

While the holiday market is the dominant visitor market (comprising 59% of international visitation and 44% of domestic visitation), the VFR sector has experienced significant growth, especially when compared with the holiday market. Importantly:

- over the period 2013–2014, holiday trips by domestic visitors to Queensland increased by 2% (699,000 visitors), compared with VFR visits that grew by 8% (2.12 million visitors)
- during the period 2006–2014, holiday trips by international visitors to Queensland declined by 17% (247,000 visitors), compared with VFR visits that grew by 40% (127,000 visitors).

Implications for the Redlands

Addressing community concerns about tourism may help in the successful implementation and garner greater support from the community. The creation of a tourism awareness program for the Redlands is advocated to highlight myriad economic and social benefits it can provide as well as ways to avoid negative impacts occurring.

Natural advantage

Global biodiversity and natural habitats are disappearing at alarming rates. Those areas of remaining pristine natural habitats are of increasing value. As the world's population grows and becomes increasingly urbanised, tourists are often drawn to quality nature-based experiences. Queensland's natural assets will become an increasingly important drawcard. The Redlands needs to capitalise on its natural habitat strengths and promote the easy access to them.

Nature as Australia's drawcard for tourists

One of Australia's primary selling features is its scenery and natural attractors such as beaches and the bush. Tourism Australia's research in 2011 found that Australia's most appealing attractions are beaches (53% of respondents), wildlife (46%), the Great Barrier Reef (44%), rainforests and national parks (42%) and unspoilt natural wilderness (40%) – demonstrating that natural-based attractions are considered to be the top five most appealing attractions in Australia (*The Future of Tourism in Queensland, 2013*).

Additionally, research undertaken on Australia's international visitor markets found that Australia's biggest strengths included "world class nature" and "coastal scenery" (*Australia Consumer Demand Research, Australia Tourism Summit 2013, Tourism Australia*).

Implications for the Redlands

The challenge for the Redlands is that all of Australia is able to offer attractive nature-based experiences, including urban and city environments. Additionally, the Redlands also faces the challenge that it is not well known as a region (despite locations within the Redlands such as North Stradbroke Island being very well known locally), so a product-based marketing program to raise the profile of the local government area and attract visitors to experience activities close to Brisbane is required. The Redlands needs to market its close proximity to Brisbane and the Gold Coast (as major international gateways) to encourage a range of visitor markets to undertake day trip excursions for nature-based experiences but it also needs to have first-class tour operators to provide quality nature-based experiences. Quality tour guiding is also required.

Black Swamp Wetlands, Cleveland

Greater urbanisation is likely to increase the desire for nature

The greater the urban density in Brisbane, the greater the demand to escape city/urban pressures by taking day or short break excursions to the Redlands.

Implications for the Redlands

The South East Queensland local market wants easily accessible experiences. As there is significant competition to capture these markets from neighbouring regions, the Redlands has to look at a marketing program that raises awareness of where and what the local government area is, and links to specific products. The Redlands needs to be actively marketing to the local market and to raise their awareness of the product that is available within the local government area.

Australians prefer Australian beaches

Research by Tourism Australia in 2013 found that Australians rate their beaches as being among the best in the world. An estimated 60% of Australians consider Australia's beach destinations to be better than those in many other destinations, including Bali, Fiji and Thailand, and, if presented with the opportunity between a domestic and overseas beach holiday, just under one-third would be more likely to take a beach holiday in Australia. This demonstrates that beaches are visitor drawcards, not only amongst international visitors but also amongst domestic visitors.

Implications for the Redlands

The beach experiences within the Redlands offer a potentially appealing passive product that provides a landscape for various passive and active experiences such as picnics, rest and relaxation as well as more active pursuits.


Cylinder Beach, North Stradbrole Island

Wellington Point Jetty

How Redlands fits with the Greater Brisbane Region

Redland City is included within the Brisbane region, as defined by Tourism and Events Queensland. Within this region, the Redlands local government area is broken up into Redlands and North Stradbroke Island, and is included in the "Greater Brisbane" destination of the Brisbane region (see Figure 2). For tourism, the regional tourism organisation is Brisbane Marketing.

Figure 2: The surrounding regions

In developing the *Greater Brisbane Region's Brisbane Visitor Economy Strategy - A Destination Tourism Plan for Brisbane 2014 – 2020*, Brisbane Marketing consulted with Council and Redland tourism operators.

In order to meet a target of growing the value of the region's tourism industry by $3.6 billion (from $4.8 billion to $8.4 billion) by 2020 and creating 80,000 full-time equivalent employment opportunities, the strategy focuses on activity around three catalytic areas:

1. Building on the strong foundations of continued economic and population growth – delivering increased investment and tourism demand.
2. Leveraging the region's destination advantage – delivering improved visitor experiences.
3. Embracing Brisbane's natural advantage – delivering competitive advantage.

The following priorities were collectively identified for the Redlands:

Build on strong economic foundations

- Extend market share, length of stay and the value of tourism to the Redlands.
- Establish a positive climate for sustainable development through town and strategic planning.
- Encourage investment in tourism accommodation.
- Develop a working group with industry and government representation to develop an overarching strategic plan for the transition from mining to tourism on North Stradbroke Island.
- Create new precincts (destinations) that meet the needs of locals and visitors with tourism-orientated development, facilities, infrastructure and marketing.
- Improve connectivity through transport, communication technology, industry unity and education.

Leverage the destination advantage

- Build a positive image for the region and support the local way of life while embracing our Indigenous history and living culture.
- Become a year-round destination leveraging our climate and range of activities and experiences.
- Activate public spaces for festivals and events and actively assist event organisers to hold events in the Redlands.
- Meet and exceed our customer expectations for tourism products, experiences and facilities.

Embrace Greater Brisbane Region's natural advantage

- Identify the experiences that provide the Redlands with a regional, national and international competitive advantage by leading marketing efforts around hero products.
- Empower a coordinated tourism industry voice to help lead and drive tourism initiatives for the tourism sector in the Redlands.

A catalyst project included in the strategy is to extend the 'Give me Brisbane Any Day' campaign into local, visiting friend and relatives, interstate and event promotion to lift preference and visitation to the region. Redlands is included in this campaign.

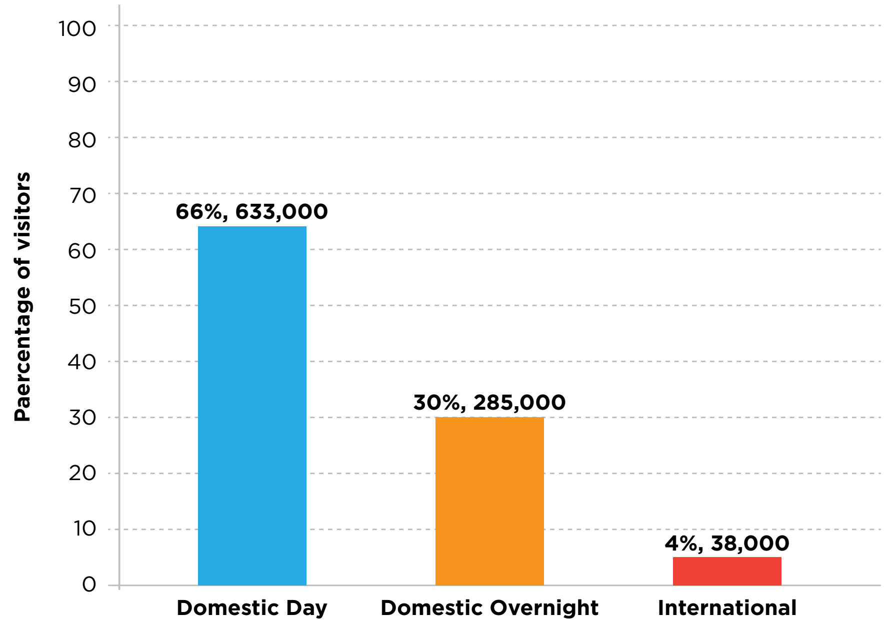
It is the intent that targets set in *Brisbane Visitor Economy Strategy - A Destination Tourism Plan for Brisbane 2014 – 2020* will contribute to achieving the target set in the Queensland Government's *Destination Success: the 20 year Plan for Queensland Tourism* – to increase visitor expenditure in Queensland to $30 billion by 2020.

Visitation to Redland City

Total visitation

Over the four-year period from December 2009 – 2012, visitation to Redlands has averaged 956,000 visitors per annum. The majority of visitors to the region are domestic day trippers, comprising 66% (633,000) of visitors per annum (see Figure 3). This is followed by domestic overnight visitors at 30% (285,000) and international visitors at 4% (38,000).

Figure 3: Visitation to Redland City, four-year average 2009 – 2012



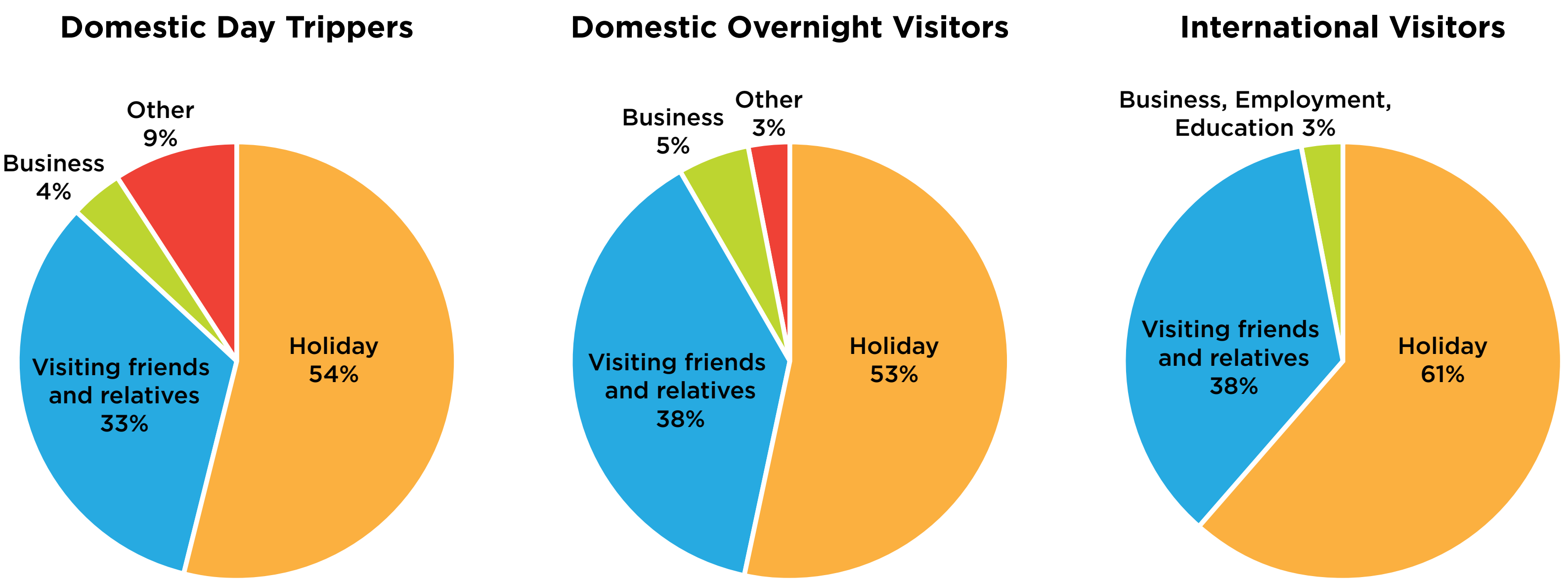
Source: *Redlands Tourism Profile, average annual data from year ending December 2009 to December 2012, Tourism and Events Queensland.*

Wellington Point

Purpose of visit

Visitor data for the Redlands reflects that it is a holiday destination, with the majority of visitors travelling to the area for a holiday or to visit friends and relatives (visiting friends and relatives, or VFR, are generally considered a holiday market); this applies to all visitor types, as demonstrated in Figure 4. For many, holidays are associated with time spent on the islands.

Figure 4: Purpose of visit to Redlands, four-year average 2009 – 2012



Source: *Redlands Tourism Profile, average annual data from year ending December 2009 to December 2012, Tourism and Events Queensland.*

Niche visitor markets

Based on Tourism and Events Queensland data, the largest visitor source market for Queensland is the domestic visitor market, including both interstate and intrastate visits (representing 96% of total visitation to Queensland). Note: these are visits rather than visitors so a reasonable percentage are likely to be repeat visitors undertaking multiple trips per annum.

International markets have traditionally been comprised primarily of New Zealanders, Europeans, those from the United Kingdom, Japan, China and the United States of America. There are also a range of emerging international markets including India and South East Asia but these only represent 3% of all visitors.

The Queensland Government has classified a number of niche visitor markets for the state. The ensure the Redlands can effectively integrate with Tourism and Events Queensland marketing programs, the same classification of niche visitor markets has been used.

These markets include:

- Backpacker tourism
- Ecotourism
- Indigenous tourism
- Small luxury lodges
- Cruise shipping, military visits and super yachts
- Food and wine tourism
- Education tourism and international student market
- Sports-based tourism and events
- Medical and wellness tourism
- Drive tourism
- Cultural tourism.

While these markets have been identified as niche visitor markets, the methodology for collecting data has recently changed at Tourism and Events Queensland. As such, the size of the markets in Queensland is not able to be quantified at the state level, let alone at a local government area level. This poses a challenge when trying to realistically assess the size of these important niche markets based on empirical data.

Dining at Mount Cotton

Markets for the Redlands to focus on

To determine the niche markets the Redlands should focus on, trend data/research sourced primarily from Tourism Australia and Tourism and Events Queensland and consultation feedback has been utilised to ascertain the markets that present the most valuable opportunities for the Redlands through a mix of qualitative assessment and the application of national level data applied to a state level.

The local South East Queensland market, while not strictly regarded as a niche market, also offers significant opportunities for the Redlands. This market includes:

- Brisbane day visitor market coming for beach and casual shopping/dining experiences
- Brisbane overnight short break market (long weekend) coming for yachting, fishing, glamping, kayaking tours, arts and cultural programs and food trails
- Older groups market i.e. Probus clubs looking for day tour experiences centred on ferry trip excursions, lunches and picnics and visiting art fairs and food trails
- Gold Coast and Hinterland day visitor market coming for fishing, art and food trails and picnics
- Gold Coast and Hinterland overnight short break market coming for yachting, fishing, glamping, kayaking tours, arts and cultural programs and food trails.

A list of the niche markets offering the best opportunities for the Redlands is outlined in Table 2.

Table 2: Priority niche markets for the Redlands

International backpacker market	• Day excursions and 1-2 night beach camping and cycling excursions
International cruise ship market	• Half-day tours to offer art and food and wine trails • Potential link to half-day eco tours and Indigenous product, ideally combined
International and interstate eco-tourism	• Overnight glamping • Day nature tours looking at marine and land-based wildlife • International day visitors looking for quality Indigenous tours
Local, intrastate and interstate food and cultural tourism	• Food trails and events for day visitors based in Brisbane or the Gold Coast • Art trails and events for day visitors based in Brisbane or the Gold Coast • Locals from South East Queensland coming for art and food trails and events
Student market	• Day excursion market for international tertiary students based at campuses in South East Queensland for passive and active recreational pursuits • Local South East Queensland high school market for day excursions to see ecotourism and Indigenous products

Tourism product audit

Based on desktop research and consultation, the following table provides a supply audit of the Redlands tourism product (excluding food and beverage as well as retail providers).

The audit identified 158 tourism related experiences ranging from cultural experiences to adventure and recreation experiences. Table 3 provides a breakdown of these experiences, based on their location.

Table 3: Redlands tourism product audit

	North Stradbroke Island	Redlands mainland	Southern Moreton Bay Islands	Coochiemudlo Island	Total
Adventure	2	10	1	0	13
Education	1	1	0	0	2
Health and Beauty	0	4	0	0	4
Hire Company	1	3	1	1	6
Museum/Art Gallery/Cultural	4	7	1	0	12
Parks, Beaches and Recreation	20	62	11	7	100
Tour Operator	8	3	1	0	12
Transport	3	3	1	0	7
Winery/Brewery	0	2	0	**0**	2
Total	**39**	**95**	**16**	**8**	**158**

It is important to note that this product audit captures only those operators who are listed on Council's tourism database and website, Brisbane Marketing's 'Visit Brisbane' website as well as those who attended or were spoken about during the consultation for this Strategy. It is important to understand that because there are a number of operators in the Redlands who do not have a web presence, they may not be captured in this audit.

As demonstrated by the audit, there are a significant number of free parks, beaches and recreation-based tourism product, representing 63% of all tourism product identified in the local government area. These should be considered valuable recreation assets rather than tourism product.

The focus for this Tourism Strategy is more aligned with Council's desire for improving the economic performance that tourism contributes to the local economy. Commissionable product is needed to stimulate more marketing potential, new investment and development, and greater job creation. This last point is particularly significant as many stakeholders noted the drift of younger people out of the Redlands in search of employment.

Lakeside, Victoria Point

Accommodation audit

The following table provides a summary list of accommodation available throughout the Redlands. While the Redlands has a wide variety of Bed and Breakfasts (B&Bs) and guesthouses, the summary demonstrates that there is a distinct lack of larger scale or branded accommodation properties. It is important to note the accommodation summary list excludes holiday home rentals and focuses on commercial accommodation product.

Table 4: Redlands accommodation audit

	North Stradbroke Island	Redlands mainland	Southern Moreton Bay Islands	Coochiemudlo Island	Total
B&B	1	5	4	0	10
Cabins	3	0	0	0	3
Camping Ground	9	1	0	0	10
Caravan Park	2	4	0	0	6
Guesthouse	1	1	4	3	9
Hotel	1	0	0	0	1
Villas/Resort	9	1	0	0	10
Motel	0	8	1	0	9
Total	**26**	**20**	**9**	**3**	**58**

The summary list was compiled based on online database searches from Wotif, TripAdvisor, Google, Visit Brisbane as well as Council's website. As stated previously, because there are many operators in the Redlands who are yet to 'go online' with their tourism business, there may be operators who have not been included in this summary list.

The distribution of commercial accommodation identified for the Redlands is as follows:

- **Redlands mainland:** 20 properties
- **North Stradbroke Island:** 26 properties
- **Southern Moreton Bay Islands:** nine properties
- **Coochiemudlo Island:** three properties.

The number of holiday home properties (those listed on Stayz.com.au) within each of the different 'parts' of the Redlands identified were:

- **Redlands mainland:** 31 holiday homes
- **North Stradbroke Island:** 276 holiday homes
- **Southern Moreton Bay Islands:** 14 holiday homes (the majority are on Macleay Island)
- **Coochiemudlo Island:** three homes.

The significance of the accommodation mix on North Stradbroke can be seen in the number of holiday homes that comprise more than 70% of the total accommodation (commercial and holiday homes) available within the Redlands.

The changing role of visitor information centres

Research on the future of visitor information services

The Sunshine Coast Regional Council recently undertook significant secondary consumer research across Australia and New Zealand as part of their Visitor Information Centres Review. This research should be considered relevant and useful to the Redlands regarding visitor information services.

The research has been utilised (where appropriate) as it contains findings that highlight the future use by consumers of visitor information centres in addition to providing details on the impact of technology and the potential role it will play in providing visitor information services for the future. It is based on an online consumer survey of 500 respondents nationwide, with an additional 60 based in New Zealand.

The key findings from the survey that highlight future trends for visitor information services include:

- the top three types of information sought prior to visiting a destination (gathered from websites or phone calls) include (in order of popularity): accommodation information, attraction information and information on "things to do" (indoor or outdoor experiences)
- regarding sources that were accessed to gain this information, the top three sources included (in order of popularity): general websites, destination specific websites and government tourism websites. Other information sources included word-of-mouth recommendations, brochures and phone calls made directly to visitor information centres. The popularity of websites for data gathering indicates the importance of having a strong, relevant and updated tourist information website
- the top five forms of information gathered either over the phone or via the web from a visitor information centre prior to visiting included (in order of popularity): maps, directions, brochure information, general advice and event and festival information
- the most useful sources of tourist information indicated were websites, brochures, guidebooks and word-of-mouth recommendations
- the three primary types of information individuals gathered from a visitor information centre during their visit included (in order of popularity): visitor attraction information, "things to do" information and information regarding accommodation options. Visitors appear to be utilising visitor information centres to gather directional information as well as information regarding current attractions
- during a visitors' stay in a region, the top three sources of information utilised include (in order of popularity): brochures, word-of-mouth recommendations and visitor information centre websites. The fact that visitors choose to visit visitor information centre websites during their visit indicates the importance and need to maintain an updated online presence. With the growing popularity of the internet, this trend is expected to continue
- in relation to whether visitors are likely to utilise visitor information centres in the future to obtain information, just over 25% indicated that they would definitely utilise them with a preference for accessing online information rather than over the counter. It should be considered that the growth in online bookings, services and advertising has had a significant impact on a visitor's likelihood of visitation to a visitor information centre. Additionally, this is supported by the fact that over 20% indicated that they would not visit a visitor information centre in the future because they could find all the information required over the internet. This once again highlights the importance for the region to establish an updated and reliable online presence for visitor information
- respondents indicated that the top two reasons why they would consider visiting a visitor information centre included to gather information on local events and activities and to obtain local knowledge. The ability to obtain a locals' perspective is a unique feature that visitor information centres are able to offer that the internet often lacks
- in order to encourage visitation to visitor information centres in the future, it was found that visitors want to be able to obtain discounts and promotions, be able to access internet facilities and be provided with restaurant guides.

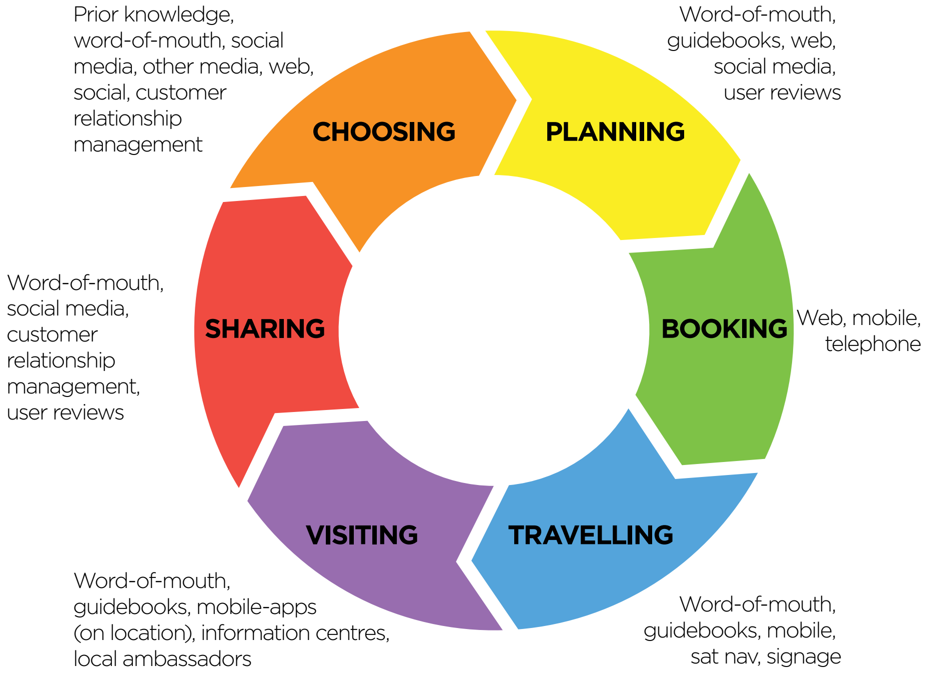
Redlands IndigiScapes Centre, Capalaba

The visitor information journey

The format and process that visitors use to gather information is rapidly changing, with the more traditional forms (hard copy brochures and visitor/tourist information centres) being increasingly replaced by mobile and online technology.

Figure 5 presents an overview of the visitor information journey, outlining the various stages of the journey and the information and information sources that are often referenced by the visitor through each individual phase.

Figure 5: The visitor information journey



Current and future trends for visitor information servicing

The following provides a synthesis of findings collected from national and international sources and, consequently, helps determine global trends for visitor information servicing.

Many visitor information centres nationally are supported by local councils. In smaller regions, the visitor information centre is often the primary tourism investment undertaken by a council. However, many councils and industry have not assessed (or have thought to assess) whether the visitor information centre services are still the optimum mechanism for council investment. This relates not only to smaller regional areas but also larger regions and/or regions where tourism is a more significant component of the regional economy.

In a Tourism New South Wales review on *Visitor Information Servicing in Sydney (2010)*, the following trends were noted:

- the top information sources that are utilised by backpackers before departing on a trip included: friends/family members (70%), travel guide books such as Lonely Planet (59%) and search engines (58%). During their trip they most commonly sourced information from other travellers (68%), tour brochures (51%) and search engines (48%)
- Facebook (64%) was by far the most popular social networking website used by backpackers for staying in touch with home, joining and contributing to backpacker travel groups and for uploading photos
- almost all respondents (88%) researched online prior to their visit
- visitors were most interested in finding out information on the "top 10 things to see and do" as well as "hidden secrets"
- the internet is the most important source of information for both domestic and international visitors alike
- people who use the internet to make travel plans, reservations and payments show a high inclination to adapt to and use new technology. As the internet becomes more aligned to other technologies such as mobile phones and

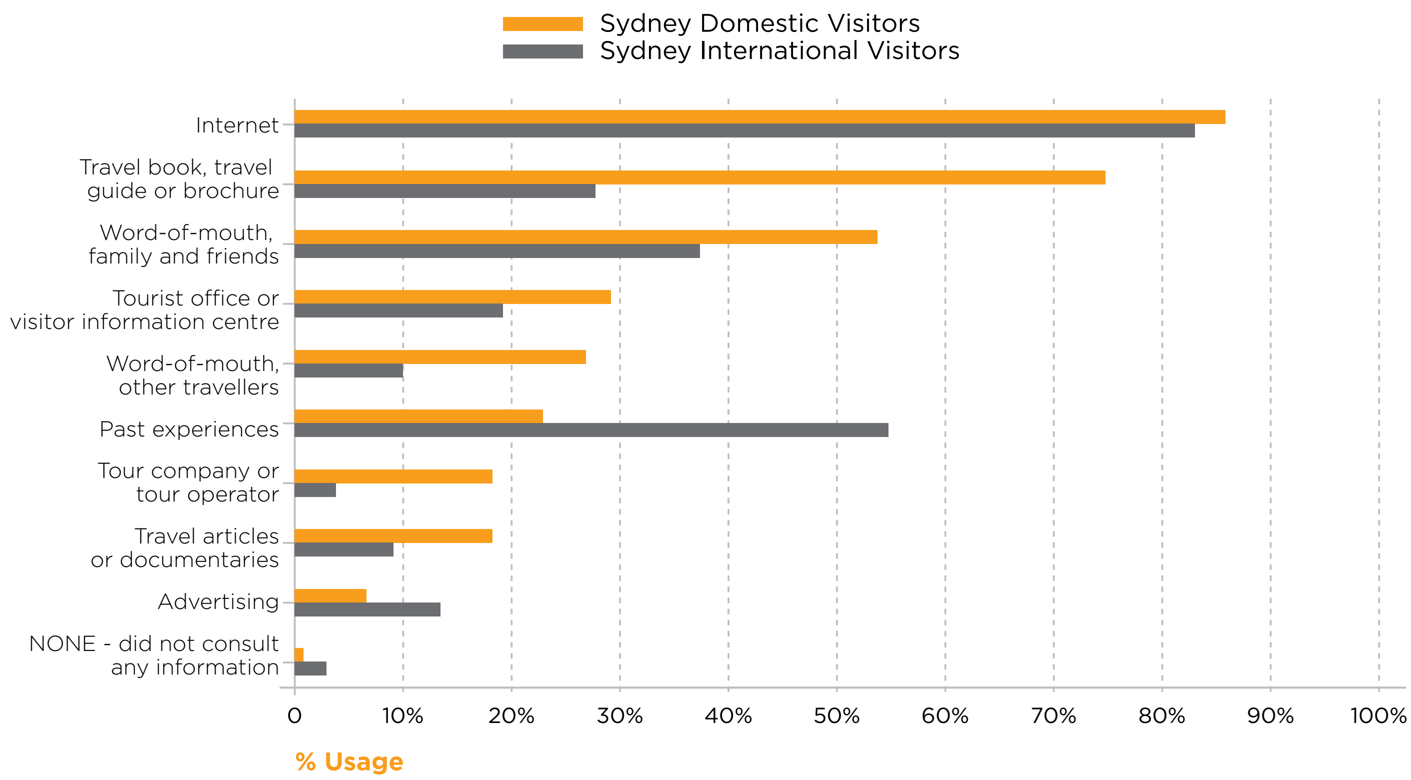
navigation systems, tourism providers need to grasp the opportunities that will arise and be aware of the threats of being an 'online laggard'

- of the information services Australians use on their mobile phones, 35% of people used maps, location and traffic information and 24% used restaurant or café information
- up to 80% of all travellers now pack their mobile/smart phone when travelling.

Figure 6 illustrates the top sources of information that are utilised by domestic and international visitors. Although this is applied to a Sydney context, this helps indicate trends in visitor information servicing.

Increasingly, with changes in consumer preference and desires, best practice visitor services

Figure 6: Comparison of sources of information for international and domestic tourists



Source: *Visitor Information Servicing in Sydney, Tourism New South Wales, December 2010, page 6.*

involve the effective utilisation of a range of technologies to provide information to visitors on demand. While not suggesting that there is a one-size-fits-all model for effective visitor information centre operations, visitor information services do need to be tailored to the needs of the retailers and the local tourism industry and the demands of consumers.

The vexed question that visitor information providers need to consider is whether it is still cost-effective to continue to invest to the same level in visitor information centres and/or whether a different mix of visitor services is now something to be considered to better meet consumer and industry needs. There are a variety of structures operating with differing staffing, volunteer structures, financial and other elements.

There is little evidence to suggest that any visitor information centres actually provide a profitable operation or even achieve a true break-even position (except Blue Mountains Visitor Information Centre near Sydney). Most visitor information centres in New South Wales service only 5-10% of visitors to a region. The most commercially focused visitor information centres seem to clearly separate the volunteer and staff functions, and in some cases, location of where they operate from.

The Viennese United Nations Visitors' Centre, while not only a visitor information centre, provides an interesting example of the use of other commercial revenue streams supporting the centre. It also has a florist, hairdresser and café. While there might be some controversy with this option, it provides an example of a multipurpose centre that operates close to break-even but in direct competition with commercial businesses offering similar or the same services.

There are numerous examples of visitor information centres that operate with "satellite" centres around central visitor information centres. These satellite centres are in the form of small kiosks or roaming "ambassadors" that are often volunteers, and a number of centres offer multilingual support services as well as tours.

Global best practice elements

The following indicates what a successful or global best practice visitor information model might look like:

- multipurpose centres where the visitor information centre comprises only one function of the overall facility (such as at a redeveloped Toondah Harbour where creating a visitor experience attraction and a visitor information centre could offer a best practice solution)
- a highly dynamic website that is attractive and functional that includes booking abilities, packages that visitors can purchase, up-to-date events/what's on calendar, contact information and is optimised for smart phones
- possibly a mobile application for the area that includes walking/cycling audio/video tours, a booking functionality, list of top things to do and a clean and attractive interface that is easy to navigate
- state-of-the-art technology screens/touch surfaces
- highly trained roving ambassadors, usually volunteers, who are allocated areas to patrol and assist visitors and can also offer tours
- highly trained staff with little expectation of cost recovery from visitor information services
- a variety of income streams but tending to include internet cafes or general food and beverage facilities as mechanisms for trying to offset overhead costs, particularly staffing costs
- a robust merchandising strategy that focuses on good quality retail stock and the needs and expectations of the visitor centre's target markets
- continuing expansion of web-based services especially for bookings and general information.

Comparative matrix

Table 5 provides a comparative analysis of more than 20 visitor information centres around Australia and New Zealand including variables such as:

- total visitor information centre income and expenditure
- the visitor information centre's net surplus or net cost of service deficit
- annual visitor numbers to the visitor information centre
- income and expenditure per visitor
- net surplus or net cost of service per visitor
- percentage of visitors who travel to the local government area/region who are also visiting the visitor information centre that illustrates the penetration of visitors to each respective local government area/ region that the visitor information centre is capturing.

The question must be asked, if these visitor information centres on average are only servicing 5–15% of the visitor market, what efforts are being employed to deliver information services to the other 85–95% of visitors?

Table 5: Visitor information centre comparative matrix

VIC COMPARISON MATRIX (ORDERED BY % OF VISITORS CAPTURED BY VICS)									
VIC Name	Total VIC Income	Total VIC Expenditure	VIC Surplus or Net Cost of Service (-)	Annual Visitors to VIC	Income p/visitor	Expenditure p/visitor	Net Surplus/Loss p/visitor	Number of visitors to region	% of visitors VIC is capturing
Hawkesbury VIC (Hawkesbury, NSW)	$4,495	$228,545	-$224,050	17,886	$0.25	$12.78	-$12.53	796,000	2.2%
Bundaberg VIC (Bundaberg, QLD)	$105,398	$156,214	-$50,817	40,408	$2.61	$3.87	-$1.26	1,125,400	3.6%
New Plymouth i-SITE (Taranaki, NZ)	$147,486	$754,524	-$607,038	46,321	$3.18	$16.29	-$13.11	1,224,000	3.8%
Clarence River VIC (Grafton, NSW)	$9,279	$137,617	-$128,338	42,035	$0.22	$3.27	-$3.05	1,013,750	4.1%
Clarence Coast VIC (Maclean, NSW)	$10,052	$149,085	-$139,033	44,882	$0.22	$3.32	-$3.10	1,013,750	4.4%
Stratford i-SITE (Taranaki, NZ)	$95,000	$364,000	-$269,000	39,036	$2.43	$9.32	-$6.89	360,000	10.8%
Orange VIC (Orange, NSW)	$126,000	$280,000	-$154,000	70,000	$1.80	$4.00	-$2.20	620,000	11.3%
South Taranaki i-SITE (Taranaki, NZ)	$63,000	$353,000	-$290,000	24,775	$2.54	$14.25	-$11.71	216,000	11.5%
Latrobe VIC (Latrobe, TAS)	$3,035	$64,773	-$61,738	12,394	$0.24	$5.23	-$4.98	108,000	11.5%
Childers VIC (Bundaberg, QLD)	$27,463	$348,968	-$321,505	20,649	$1.33	$16.90	-$15.57	158,880	13.0%
Launceston VIC (Launceston, TAS)	$312,750	$737,250	-$424,500	75,000	$4.17	$9.83	-$5.66	558,400	13.4%
Burnie VIC (Burnie, TAS)	$109,880	$233,985	-$124,105	22,800	$4.82	$10.26	-$5.44	138,000	16.5%
Burra VIC (Burra, SA)	$60,543	$118,524	-$57,981	28,256	$2.14	$4.19	-$2.05	166,000	17.0%
Penguin VIC (Central Coast, TAS)	$52,994	$44,770	$8,224	19,442	$2.73	$2.30	$0.42	105,200	18.5%
Stanley VIC (Circular Head, TAS)	$75,226	$115,292	-$40,066	15,651	$4.81	$7.37	-$2.56	81,800	19.1%
Gin Gin VIC (Bundaberg, QLD)	$7,632	$74,100	-$66,469	8,360	$0.91	$8.86	-$7.95	39,720	21.0%
Ulverstone VIC (Central Coast, TAS)	$34,934	$172,980	-$138,046	23,327	$1.50	$7.42	-$5.92	105,200	22.2%
Devonport VIC (Devonport, TAS)	$186,550	$564,159	-$377,609	63,320	$2.95	$8.91	-$5.96	247,100	25.6%
Cooma VIC (Cooma-Monaro, NSW)	$116,400	$319,800	-$203,400	60,000	$1.94	$5.33	-$3.39	218,000	27.5%
St Helens VIC (St Helens, TAS)	$85,706	$158,163	-$72,457	39,825	$2.15	$3.97	-$1.82	136,000	29.3%
Wynyard VIC (Waratah-Wynyard, TAS)	$61,013	$273,569	-$212,556	35,483	$1.72	$7.71	-$5.99	90,700	39.1%
Sheffield VC (Kentish, TAS)	$307,645	$402,679	-$95,034	51,666	$5.95	$7.79	-$1.84	123,500	41.8%
Strahan VIC (West Coast, TAS)	$837,878	$882,463	-$44,585	77,759	$10.78	$11.35	-$0.57	150,400	51.7%
Average	**$123,494**	**$301,498**	**-$178,005**	**$38,229**	**$2.67**	**$8.02**	**-$5.35**	**$382,426**	**18%**

Note: *As data was collected over various projects in the last three-year period, some statistical information refers to calendar years while other refers to financial years. Importantly however, all of this data is over a three-year period that is statistically comparable.*

SWOT analysis for tourism in the Redlands

Strengths

- Large number of repeat summer holiday, family holiday and visiting friends and relatives tourists with high satisfaction
- Close proximity to major capital city
- Excellent opportunities for viewing wildlife (including marine mammals, fish, turtles, birdlife and marsupials)
- Beaches and islands
- Boutique agricultural produce
- Renowned fresh seafood product
- Number of island destinations
- 2WD accessible / 4WD on beach
- Brisbane and South East Queensland family holiday and short break holiday destination
- Safe and friendly family environment
- Temperate climate
- Diverse range of reasonably priced and well located accommodation options, including beach camping
- Established scenic tour routes
- Effective strategic alliances and networks at local, regional and state level

Weaknesses

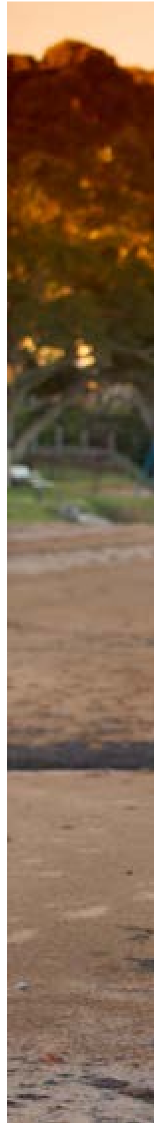
- Limited commissionable product
- Lack of higher end and larger scale accommodation to support tour groups, conferences and functions
- Limited ground transport
- Lack of jetty/boating infrastructure
- Lack of directional and interpretive signage
- Parking issues, particularly around ferry access points
- Lack of a clear identity for the Redlands and its parts – no destination identity and possibly seen as part of Greater Brisbane
- Lack of quality visitor information services
- Planning/zoning restrictions
- Lifestyle operators with different needs
- Demographic challenges with ageing population
- Lack of tourism sector coordination and structure
- Impact of seasonality
- Lack of public boat moorings/ berthing
- Limited bay access (public ramps and jetties) i.e. kayaks
- Customer service standards
- Lack of international ready product
- Limited quality dining (especially Southern Moreton Bay Islands)

Opportunities

- Greater coordination and unity within the tourism industry via a tourism subcommittee
- Potential to capture the passing boating market through introduction of additional marine infrastructure such as a jetty/floating pontoon for the Southern Moreton Bay Islands and tourism precincts on the mainland
- Improved destination brand awareness via the development of an identity for the local government area and its parts
- Redevelopment of Toondah Harbour, Weinam Creek and Dunwich Harbour with the inclusion of dedicated tourism precincts
- Local market looking to undertake new experiences including those closer to home as a result of fuel costs and current economic climate
- Packaging of product available throughout the Redlands will present opportunities to capture a large share of the local market as well as the intrastate and interstate markets looking for short break experiences
- Introduction of a destination caravan holiday park to cater for a range of markets including grey nomads, the family market and a higher yielding interstate market (via quality chalets within the park)
- Servicing a larger proportion of the visitor market via online visitor information services through a new destination website for the Redlands as well as improved signage (directional and interpretive) and a roving ambassador program
- Introduction of a conference facility with accommodation to capture an intrastate conference market (primarily South East Queensland region)
- Beautification of the Redlands and greater community pride through street-scaping, the development of foreshore walks, boardwalks and cycling paths
- Growth in community awareness of the importance of tourism via a tourism awareness program
- Capturing niche visitor markets such as those looking for authentic food experiences via food trails and cooking schools, cultural experiences via an art trail program and increased promotion, and corporate retreats as a result of the introduction of corporate glamping
- Introduction of an aviation park to generate an entirely new visitor market for the Redlands
- Greater coordination and promotion of events via a local government area events calendar and promotion strategy
- Better planning for North Stradbroke Island via a strategic plan to ensure it grows on a sustainable basis
- Enhancement of connectivity within the Southern Moreton Bay Islands and North Stradbroke Island through a review of the bus service timetable
- Stimulation of additional investment into the Redlands via the development of an investment memorandum

Threats

- Strong level of competition from destinations such as the Gold Coast and coastal areas to the north
- Government agency restrictions (local and state government regulations i.e. national parks, environment protection and maritime)
- Increasing fuel costs for barge/ferry companies servicing the islands passed on to consumers
- Local residents' attitude to tourism, especially on islands
- September 'schoolies' week
- Complacency within tourism industry
- Competing interests for discretionary spend
- Visitors loving the destination to death and destroying the very fragile ecosystems that make the destination initially attractive
- Marine park zoning
- Lower yield family holiday market dominating
- Confusion of roles and responsibilities of tourism facilitators (local government and industry)
- Nearby mature and rejuvenated destinations with greater marketing budgets and focus
- Major environmental crisis or catastrophic event could change the perception of the area as a safe and unspoilt destination
- Urban and industrial encroachment on rural/coastal landscapes and natural areas



Victoria Point

Coochiemudlo Island

Issues and gaps

To facilitate the success of this Tourism Strategy and ultimately, to promote the development of sustainable tourism for the Redlands, there are some identified issues and gaps.

These issues and gaps have been segmented into the following categories:

Product and supporting infrastructure	Destination marketing and promotion	Other challenges

• Commissionable product
• Higher end and larger scale accommodation
• Ground transport
• Southern Moreton Bay Islands jetty/boating infrastructure
• Directional and interpretive signage
• Parking
	• Strong competition from destinations such as the Gold Coast
	• A clear identity for the Redlands
	• Proximity to Brisbane CBD i.e. too close to be a getaway
	• Profiling by Brisbane Marketing
	• Tourism/destination website
	• Visitor information services
	  ▪ Location of the visitor information centre
	  ▪ Visitor information
		• Planning/zoning restrictions i.e. operating a B&B on the Southern Moreton Bay Islands
		• Tourism sector coordination and structure
		• Lifestyle operators with different needs i.e. retirees running businesses with different motivators
		• Demographic challenges with an ageing population
		• Lack of tourism investment

It is important to note that the responsibility of resolving these issues does not fall solely to Council – many will require the active participation of the Redlands tourism industry.

Recommendations to resolve or convert these issues into opportunities for the Redlands are outlined as follows.


Accomodation on North Stradbroke Island

Product and supporting infrastructure

Commissionable product

Part of the challenge for the Redlands in growing its visitor market is the limited amount of commissionable tourism product available that is packaged and actively promoted. Much of the Redlands' tourism promotion focus is centred on natural and free experiences.

Furthermore, the Redlands has very few large-scale operators and as a result, tourism is primarily centred on small businesses, which are generally less likely to participate in cooperative marketing initiatives and can often be under capitalised.

The ability to grow visitation to the Redlands will be dependent on:

- introduction of a wider product mix offering different and new experiences (both commissionable and free)
- development of packaged experiences to help make it easier to promote the destination
- development of collective marketing initiatives that can actively promote the region for a variety of purposes
- a stronger online promotional presence acknowledging the need to encourage people to visit Redlands – the best place to live, play and do business.

Higher end and larger scale accommodation

A significant percentage of visitor accommodation in the Redlands is provided by smaller family-run guest houses, bed and breakfasts and motels. Higher quality and larger hotels are under-represented.

Visitor statistics from Tourism and Events Queensland indicate that the majority of overnight visitors to the Redlands (46% of domestic overnight visitors and 58% of international overnight visitors) stay with a friend or relative.

Only 12% of domestic overnight visitors and 4% of international overnight visitors stayed in a commercial hotel, motel, serviced apartment or motor inn (*Redlands Tourism Profile, Average Annual Data from Year Ending December 2009 – December 2012, Tourism and Events Queensland*).

This lack of accommodation has several implications for the Redlands including, but not limited to, the inability to secure larger events and conferences as there is insufficient accommodation of a high enough quality/brand for event/conference attendees.

Domestic and international trends identified through the consultation process and via research indicate a desire for larger, branded hotel accommodation to support the event/conference market as well as international visitor markets.

The size and scale of a conference venue and associated hotel should be subject to a feasibility assessment.

Ground transport

Feedback from stakeholder workshops indicates that transport is a major issue for the Redlands. While it is important to recognise that this issue is not unique to Redlands, especially with several islands facing similar issues, the following points were raised by stakeholders as increasingly impacting on their capacity to grow tourism:

- while the free inter-island transport within the Southern Moreton Bay Islands has been a great initiative, lack of transport options between the Southern Moreton Bay Islands and North Stradbroke Island is thought to be problematic, with users having to travel from the Southern Moreton Bay Islands back to Cleveland and catch another ferry to North Stradbroke and vice versa
- feedback from Bay Islands Transit Systems indicated that they have trialled running a ferry service from Russell Island to North Stradbroke Island, however, the cost is prohibitive ($25 plus one way) and there was limited demand during the trial period
- particularly within the Southern Moreton Bay Islands and North Stradbroke Island, there are limited ground transportation options (including public bus services and encompassing routes) unless users bring a bike or vehicle with them on the ferry. Feedback received is that many of the clubs (such as the golf clubs, bowls club and RSLs) on the islands have small buses that are rarely used. During peak tourism periods, if these buses could be coordinated to offer visitors transportation to attractions and events this could offer a good solution for visitation
- there are currently two water taxi companies in the Redlands, however, their tickets are not interchangeable
- while there is an electric train link between Brisbane and the Redlands, feedback indicated that this service is long in duration and therefore unappealing for visitors.

Southern Moreton Bay Islands jetty/boating infrastructure

While the Redlands is renowned for its safe harbour conditions and stunning coastal and island scenery, the infrastructure to support visitation by boats i.e. motor boats, yachts, jet skis and kayaks is inadequate, particularly within the Southern Moreton Bay Islands.

Research indicates:

- there are no publicly accessible facilities on the Southern Moreton Bay Islands to tie up a tender or jet ski, making it difficult for the islands to encourage the boating market travelling past to visit, spend time and money on the islands and potentially stay overnight
- there is a need to create infrastructure to allow for low tide access
- Redlands is ideally located halfway between Brisbane and the Gold Coast. Both these cities have strong boating markets who are seeking new places to visit on their jet skis, boats and yachts. With suitable infrastructure, the Redlands (and in particular the Southern Moreton Bay Islands) could provide an attractive place for this market to stop over for refreshments, events and potential overnight accommodation
- the Royal Queensland Yacht Squadron has a private jetty facility at Canaipa on the north-east tip of Russell Island where members are able to tie up tender boats. The site also has a club house, shower and toilet facilities, a swimming pool and barbeques. No public access is permissible at this facility
- Thompson's Point, Macleay Island could be a location for a jetty/pontoon
- with the tidal impact of the waterways around the Southern Moreton Bay Islands, there would be a need for any jetty/wharf created to have a floating pontoon attached, which can rise and fall with tidal movements.

When stakeholders were asked where the jetty/boating infrastructure would be best placed in the Southern Moreton Bay Islands, the following was noted:

- the location within the four Southern Moreton Bay Islands does not matter because of the free inter-island travel available
- Lamb Island, being one of the central Southern Moreton Bay Islands, may provide an ideal location
- Bay Islands Transit Systems indicated this facility would need to be located in a position away from their current ferry terminals to avoid congestion and safety issues
- Russell Island, being one of the largest and with the greatest supporting infrastructure (retail and accommodation) could be an ideal location.


Coochiemudlo Island

Directional and interpretive signage

Within the Redlands, there is currently a lack of directional signage, which is crucial to encourage visitation to places of interest and outline walks and trails (such as heritage and cultural walks).

It is important to consider that better signposting of the Redlands' natural attractions could also potentially encourage visitors and the community to make better use of these facilities for activities including walking, cycling and picnicking.

There is also currently a lack of interpretive signage at entry points to the Redlands and at key attractions and sites of significance.

Parking

The majority of stakeholders consulted in preparation of this Tourism Strategy commented that parking within the Redlands is a significant problem. Particular areas highlighted include:

- ferry terminals (Toondah Harbour and Weinam Creek)
- Main Beach on North Stradbroke Island
- Raby Bay Harbour
- Cleveland CBD*.

** The parking ratio for the CBD has been reduced from 1.25 parks per residential unit to 1.*

Destination marketing and promotion

Strong competition from destinations such as the Gold Coast

In some ways, the Redlands is fortunate to be surrounded by strong tourism destinations and brands such as Brisbane and the Gold Coast as the Redlands can benefit from the tourism "trickle down" effect.

However, being so close to these high profile and highly marketed destinations can result in the Redlands struggling to market and position itself as a distinct destination in its own right.

A clear identity for the Redlands

Within Tourism and Events Queensland regional tourism organisation boundaries, the Redlands falls within the Brisbane Marketing region. This provides an opportunity for the Redlands to leverage off the Brisbane region's significant marketing budget and brand profiling. However, with the diversity and size of the Brisbane region – along with its strong visitor connections to the Gold Coast and the Sunshine Coast – it is easy for smaller areas, with limited product and branding, to be overlooked.

The Redlands, which incorporates Redlands mainland, North Stradbroke Island, Coochiemudlo Island and the Southern Moreton Bay Islands, appears to lack a clear identity and a discernible image.

To position the Redlands more appropriately within the Brisbane region, there is a need to develop the tourism identity. Importantly, this tourism identity must be developed in consultation with the community to ensure the identity is accepted and utilised by tourism operators and industry generally.

Additionally, feedback indicated that visitors often find the term 'Redlands' confusing. This confusion tends to involve not understanding whether Redlands comprises just the mainland or includes the islands.

If a new identity is developed it will need to clearly demonstrate that the Redlands comprises the mainland as well as islands.

There is also some confusion in the marketplace over whether Redlands is included in the Moreton Bay area. The identity will also need to clearly illustrate that the Redlands is not just part of the Moreton Bay area but is a destination in its own right.

Proximity to Brisbane CBD

While the Redlands' proximity to the Brisbane CBD and Brisbane Airport provide an important local market and gateway for the area, it also provides one of the greatest challenges. The closeness of the Redlands to Brisbane means that the Redlands is possibly seen by some markets (including locals) as merely an extension of Brisbane.

This places greater pressure to develop tourism facilities that can be major stimulants to encourage people to visit and make the Redlands a destination in its own right.

In comparison, the Sunshine Coast and the Gold Coast offer sufficient distance from Brisbane to give the feeling that they are separate destinations that should be visited.

Profiling by Brisbane Marketing

The Redlands local government area is included within the Brisbane region, which is managed by Brisbane Marketing as the regional tourism organisation. Council contributes to a contestable funding program along with seven other local government agencies each year to ensure the Redlands is represented in regional marketing campaigns i.e. *Give me Brisbane Any Day*.

Some stakeholders commented on the minimal profiling they consider they receive from Brisbane Marketing. This could be a reflection of the smaller operator contribution made to Brisbane Marketing by Redland operators when compared with other larger operators from other local government areas, coupled with limited commissionable product and a lack of higher end accommodation options.

Tourism/destination website

Currently, there are a range of tourism websites for some attractions and product within the Redlands. However, there is no unified website that is accepted by the Redlands' tourism industry as being the online 'face' of the local government area. While there is a section on Council's website to promote the Redlands, visitors do not recognise local government area boundaries – they travel to "destinations".

It is important that the Redlands can be recognised online as a destination in itself with a dedicated online presence, such as a destination website.

Visitor information services

Location of the visitor information centre

The Redlands Visitor Information Centre is located in Capalaba at Redlands IndigiScapes Centre (an environmental education centre).

Feedback indicates that the visitor information centre should ideally be located at one of the key ferry terminals in the Redlands to act as a staging post to the islands.

With the potential redevelopment of Toondah Harbour, consideration should be given to locating a visitor information centre or information outlet within the redevelopment.

Visitor information

There is a perceived lack of basic visitor information, such as maps and attraction guides, which visitors can use to navigate the Redlands and find out what it has to offer. There is also a need to improve basic visitor information services such as the development of a destination map, mobile application or digital visitor guide.

Other challenges

Planning/zoning restrictions

Feedback from stakeholders indicated that zoning/planning laws under the existing *Redlands Planning Scheme*, particularly on the Southern Moreton Bay Islands, are restrictive and subsequently prohibit the growth of tourism on the islands.

This has created the perception in the general tourism industry, and the investment and development community, that Council is not always sufficiently supportive of tourism development. This perception needs to be addressed in order to align the community, industry and Council. It is crucial for tourism growth that Council and indeed the Redlands show that the City is "open for business and investment" and that it is supportive of tourism.

It is important to note that Council is planning for the future with work now underway to prepare a new planning scheme for 2015 and beyond. The new Planning Scheme will be known as "Redland City Plan" and will include a public review period.

There is a need for the tourism industry and the development and investment community to work with Council to ensure the new City Plan contains zoning rules and details that are supportive of tourism development and investment.

Level of tourism investment

Stakeholder feedback indicated that there has been a lack of investment in the tourism industry from commercial developers and operators for new accommodation as well as attraction/experience-based product.

Operators commented on the inability to upgrade existing tourism product because of lack of funding as well as zoning/planning restrictions.

Note: Council has established a Tourism Accommodation Incentive Package to promote and facilitate tourism development as well as contribute to jobs and growth across the region, which is set to run until 30 June 2016. The package provides incentives for the establishment of Bed and Breakfast, Tourist Accommodation or Tourist Park to stimulate economic activity in the Redlands. Investors can now take advantage of:

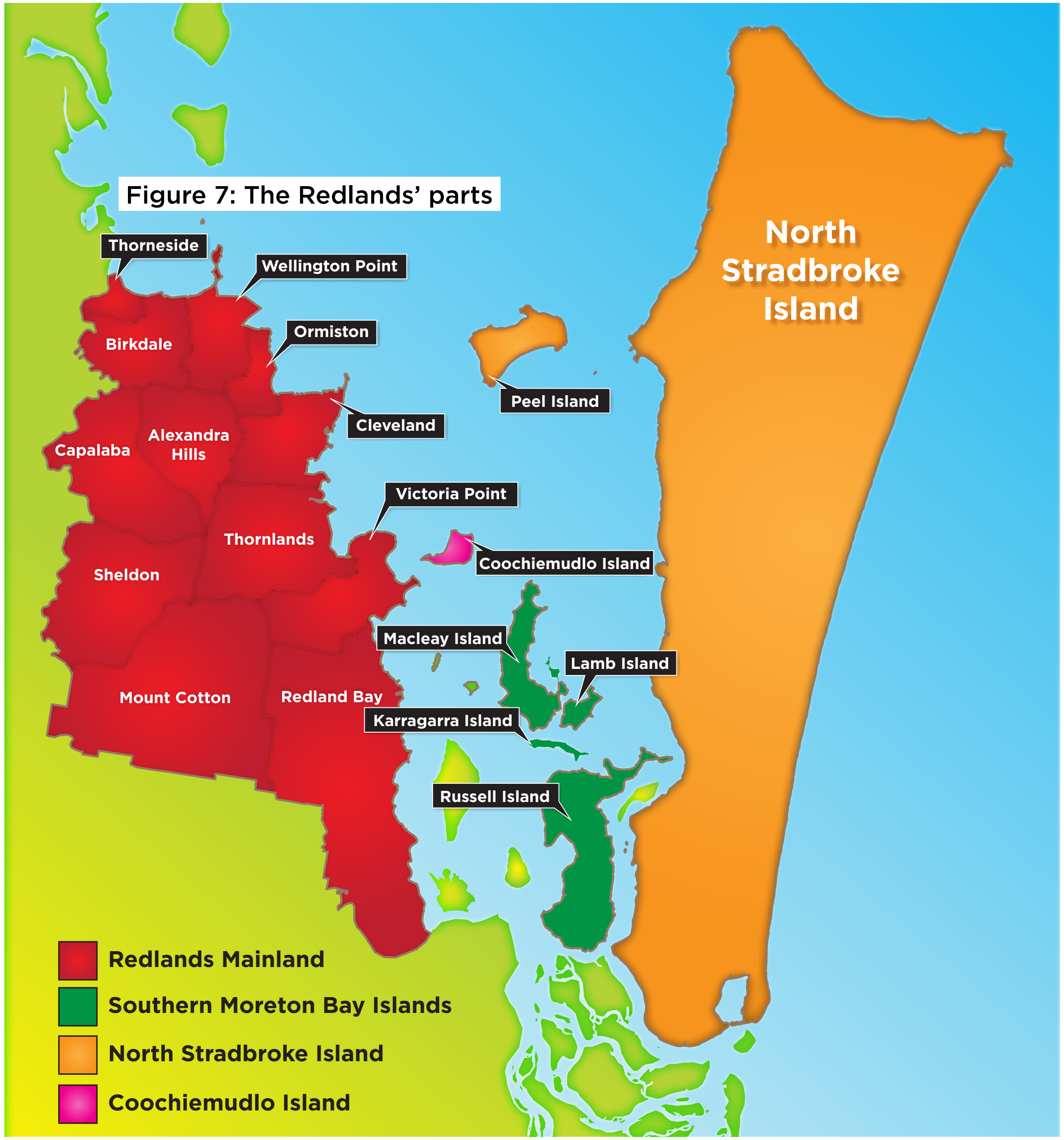
- 100% concession on infrastructure charges and development application fees for material change of use development (involving building works) for Bed and Breakfast, Tourist Accommodation or Tourist Park
- 20-business day assessment timeframe
- rating and utility charge concession during construction.

Tourism sector coordination and structure

The Redlands is a very diverse and unique region, consisting of mainland Redlands, along with islands off its eastern boundary. These islands, while being fairly close together geographically, have distinctive features and directions that residents and tourism operators are seeking to pursue. There is very little coordination and integration, particularly from a tourism point of view, between the different parts of the Redlands.

Figure 7 provides an illustration of the primary tourism "parts" of the Redlands. Within these parts, there is some level of integration, however, there is little to no integration between the separate parts.

Figure 7: The Redlands' parts



From a funding and resource perspective, there is a need for coordination between the separate parts of the Redlands. While there is some degree of collaboration within each of the parts of the Redlands, particularly within the Southern Moreton Bay Islands, there is a need for a greater degree of coordination in order to drive and grow tourism.

Lifestyle operators with different needs

Feedback received from stakeholders indicates that there are a significant number of lifestyle operators rather than fully commercial players within the Redlands. This is primarily because many have moved to the Redlands for lifestyle or retirement purposes. The needs and aspirations of lifestyle operators differ from fully commercial players.

Demographic challenges with an ageing population

Feedback indicated that the Redlands faces a number of demographic challenges, including an ageing population and youth unemployment levels.

Statistics from the latest *Australian Bureau of Statistics Census (2011)* indicate:

- Redland City had a lower proportion of pre-schoolers and a higher proportion of persons at post-retirement age than Greater Brisbane in 2011
- in the Redlands local government area, the Southern Moreton Bay Islands have the smallest proportion of its resident population under the age of 24, comprising only 23% (Alexandra Hills, Thornlands and Wellington Point on the other hand have the highest proportion at 36% of each of the suburbs' population being under the age of 24). This demonstrates that the Southern Moreton Bay Islands have an ageing population
- the Southern Moreton Bay Islands have the highest unemployment rate of the Redlands at 21.2% (an increase of 7.2% since the 2006 Census). This is followed by Coochiemudlo Island (13.7%) and North Stradbroke Island (6.4%).
- Mount Cotton has the lowest unemployment rate at 2% in the Redlands, followed by Sheldon at 3.4%.

Note: An ageing population can present advantages through increased volunteering participation rates, community spirit and sharing local knowledge. There have been some attempts to combat unemployment issues on the islands, by encouraging youth in particular, to undertake vocational education and training certification courses in tourism and hospitality related fields.


Macleay Island

Opportunities

There are some key opportunities that the Redlands tourism stakeholders – and Council – should focus on in order to activate and grow tourism as an industry.

The opportunities highlighted in this Tourism Strategy have deliberately been kept succinct to ensure that the focus is on those that are likely to generate the best possible returns in the shortest timeframe. They represent the "lower hanging fruit" opportunities for Council and the Redlands local government area.

It is important to note that Council has a key role to play as an enabler in facilitating and driving these projects.

The opportunities have been segmented according to the following categories:

Tourism investment and development opportunities	Destination marketing and event opportunities	Supporting infrastructure and engagement opportunities
• Conference centre with accommodation possibly at Toondah Harbour or Weinam Creek • Other development initiatives for the Toondah Harbour and Weinam Creek Priority Development Areas • Mainland foreshore boardwalk and cycle way • Facilities for caravans, motor homes and camping • Brisbane to Amity Point ferry service • Boardwalk and cycle paths on North Stradbroke Island • Development of Dunwich Harbour, North Stradbroke Island • Development of aviation park (recreation and business) • Corporate glamping • Development of jetty/floating pontoons	• Art trails program • Developing a clearer Redlands identity • Mobile-accessible website • Improvement of visitor information services • Packaging of product • Tourism awareness program • Food trails and cooking schools • Events calendar and promotion • Indigenous cultural tourism • Reputation for being a film-friendly City	• Street-scaping gateways into the Redlands • North Stradbroke Island economic transition strategy • Economic Development Advisory Board • Signage program • Roving ambassador program • Improvement of bus services on the islands • Customer service program • Stimulate investment into the Redlands

Tourism investment and development opportunities

Conference centre with accommodation possibly at Toondah Harbour or Weinam Creek

On 18 September 2014, the State Government and Redland City Council announced Walker Group as the preferred partner to develop both the Toondah Harbour and Weinam Creek Priority Development Areas (PDAs). The Walker Group has a 12-month extension to produce a plan for Weinam Creek.

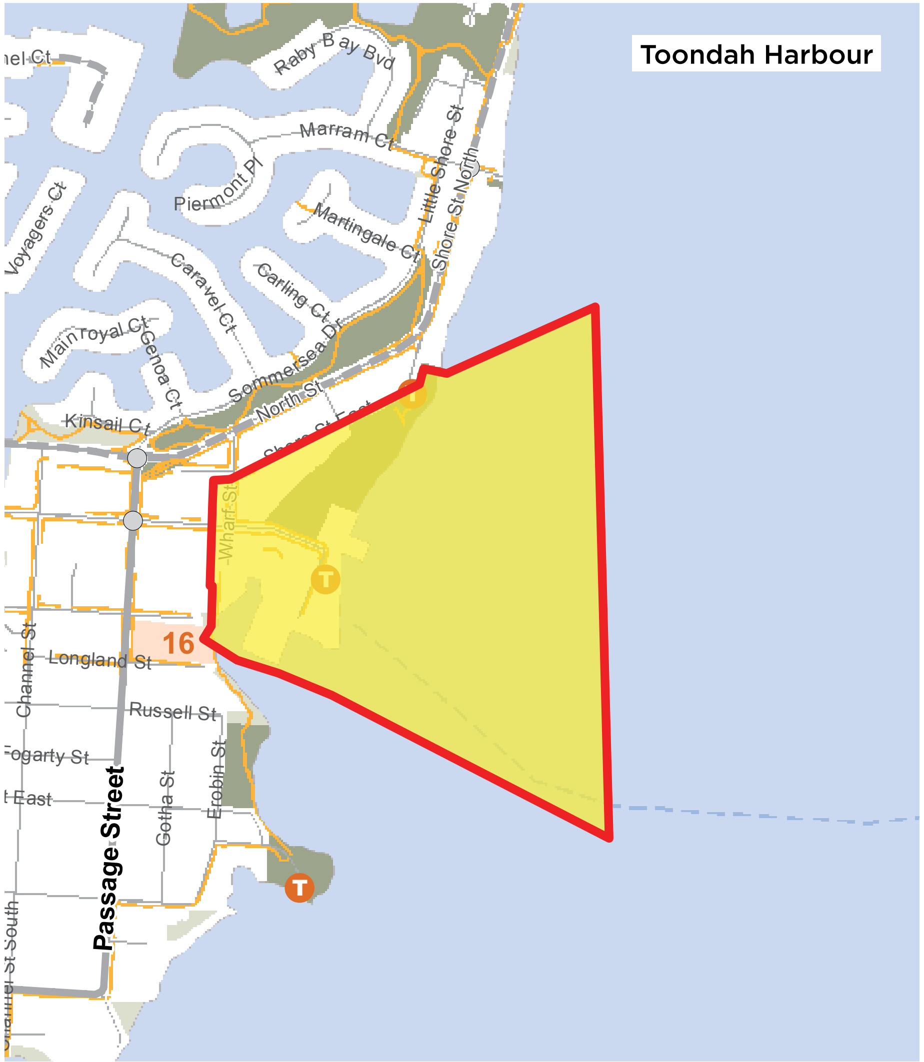
The PDAs are being jointly managed by the State through Economic Development Queensland and Redland City Council.

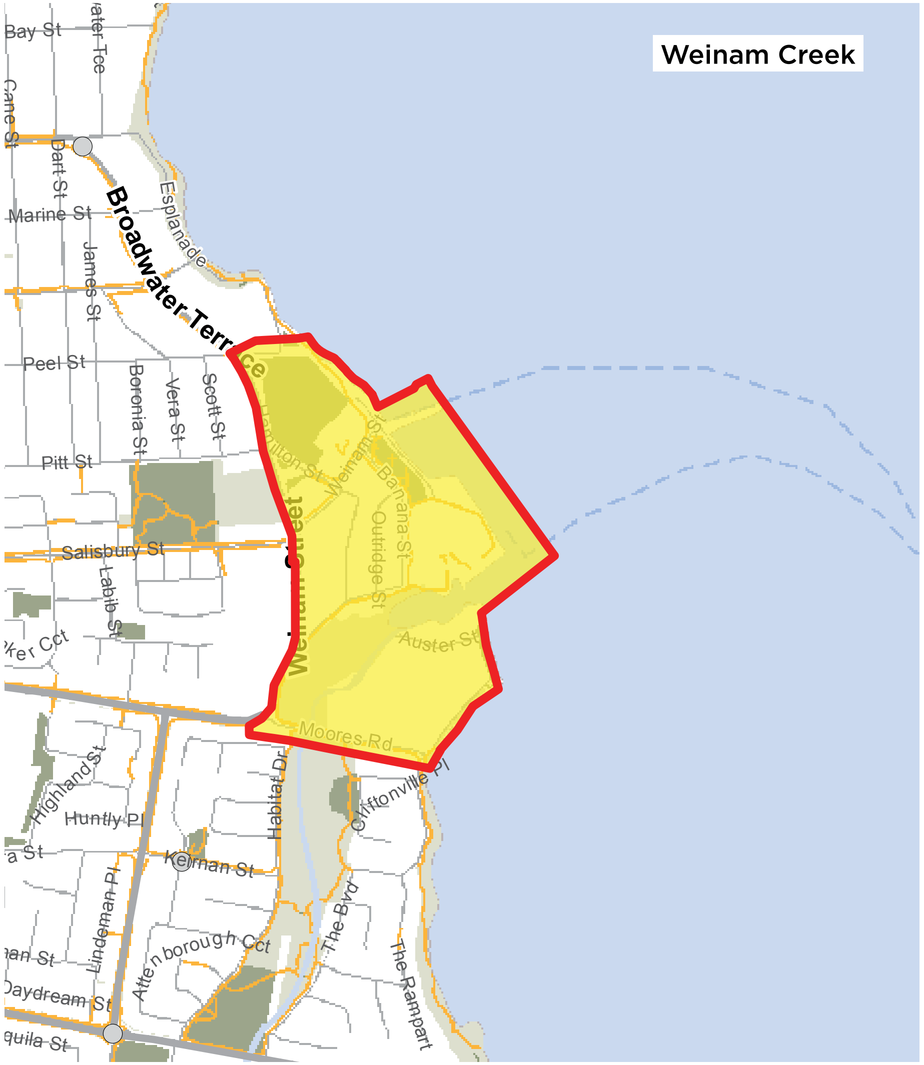
The following is being investigated to be included as part of the PDAs:

- mixed use and medium density residential development
- tourism and retail-based development
- dedicated ferry terminals
- public open spaces
- the potential for a private berth marina.

The opportunity therefore exists for Council to advocate for the development of certain tourism opportunities within the PDAs and recognise the crucial role the areas play as the staging posts for North Stradbroke Island (Toondah Harbour) and the Southern Moreton Bay Islands (Weinam Creek) within the Redlands.

Figure 8: Map of PDA boundaries





The following is an overview of tourism development opportunities that could be advocated for as part of the PDAs.

While the Redlands has an abundance of bed and breakfasts, motels and guest houses, it is limited by its lack of higher end and larger scale accommodation.

With the redevelopment of Toondah Harbour, Council is presented with an opportunity to advocate for the inclusion of a possible 350–400 seat conference centre, with an attached branded 100–150 room accommodation property and an Indigenous Interpretive Centre.

To achieve a variety of sustainable social, environmental and economic benefits for the local community, it is important to note:

- medium to larger scale accommodation facilities often generate substantially higher employment opportunities than much smaller scale businesses i.e. bed and breakfasts when comparing similar room numbers
- medium to larger accommodation providers will often have greater resources to be able to offer marketing support and funding to assist community-based events including festivals i.e. cultural and sporting
- the move towards eco-certification and green building technology is often easier and more cost effectively developed with medium to larger facilities that can amortise the cost over a larger number of accommodation units and can maintain properties to the standards required
- medium to larger accommodation facilities have the potential to attract international and national accommodation brands, which, in turn, have significant marketing programs and budgets to encourage not only product promotion but could also help raise the profile of the Redlands.

Cycle way along Redland Bay

Other development initiatives for the Toondah Harbour and Weinam Creek PDAs

Other recommendations to be advocated for in the PDAs include:

- positioning Toondah Harbour as a major staging post for access to North Stradbroke Island, including the development of a visitor precinct with cafes, bars and retail
- confirm areas at each PDA for a tourism precinct focused on commercial tourism enterprise
- creation of an attractive promenade area for visitors
- potential relocation of the Redlands Visitor Information Centre at Capalaba to Toondah Harbour and/or consider the introduction of information outlets to supply tourism and community-based information. This could include:
  - ♦ a staffed or unstaffed model. If unstaffed, information touch screens could be used to provide visitors with access to information about the Redlands
  - ♦ some form of interactive visitor experience linked to the visitor information centre.

Mainland foreshore boardwalk and cycle way

The Redlands has a long and attractive foreshore. However, while there are walkways or bikeways along some areas of the foreshore in place, such as Eddie Santaguliana Way in Cleveland, feedback received from Council and stakeholders indicates that there is limited access to the foreshore on the Redlands mainland.

In some areas, vegetation has been planted along the foreshore that is blocking the view and restricting access to the water's edge as well as preventing recreation and tourism facilities such as picnic sites.

An opportunity exists to develop a high-quality boardwalk and cycleway – or extend existing infrastructure such as the Moreton Bay Cycleway to create regional links to surrounding local government areas – along the Redlands coastline.

This could be undertaken on a staged basis, and once fully completed, could provide visitors and locals with greater accessibility to the Redlands.

The boardwalk could incorporate interpretive elements as well as artwork to tell stories from the Redlands Indigenous and community history as well as information on the significance of flora and fauna throughout the area. It could also incorporate a sculpture trail, rest areas, fitness stations and picnic sites. Consideration of access to facilities such as cafes is also important when planning this type of infrastructure.

Facilities for caravans, motor homes and camping

Feedback received from stakeholders indicated that there are some caravan parks scattered throughout the Redlands, however there is a lack of destination-style caravan parks (or holiday parks) to attract a longer staying visitor market.

There are currently no dump points within the Redlands where travellers can discard human waste and grey water. There are also no overnight short-stay parking areas allocated for recreational vehicles including motor homes and campervans.

Over the past 15 years, the caravan, motor home and camping industry has been the fastest growing domestic tourism sector in Australia. In this period, caravan and recreational vehicle registrations have increased by more than 250%. The industry is worth $6.5 billion nationally and currently provides for 620,000 holidays per annum (*Caravan and Camping Industry Profile, Caravan and Camping Industry Association NSW, pages 2-4*).

The industry is constantly evolving with successful parks responding to consumer demand for better standards and facilities by transforming from traditional transit parks into holiday/destination parks.

Traditional caravan parks often have very basic facilities and are used as transit parks by travellers i.e. overnight accommodation when travelling between two destinations, rather than being a destination in its own right.

The modern form of caravan parks – often referred to as destination or holiday parks – usually feature a combination of caravan/camping sites and camp kitchens as well as units and chalets, water parks, pools and waterslides, mini golf, playgrounds, kids' clubs, group entertainment, games rooms, biking trails, cafes and shops. Consequently, these parks are attracting a growing number of families who utilise the park as their holiday destination rather than solely utilising them as a means of accommodation.

Interestingly, feedback received from Tourism and Events Queensland emphasised a declining number of caravan parks in Queensland. This decline does not appear to be as a result of lack of demand but, rather, as a result of a lack of suitable land for their development and the sale of many existing coastal caravan park sites for residential and mixed use commercial development.

To encourage visitors to stay in the Redlands and visit for a holiday – rather than just visiting as day trippers – the opportunity exists to create a new family-centric holiday destination park. The development of a holiday park within the Redlands provides an ideal opportunity for Council to take a major role in finding appropriate sites (ideally on Council land for lease to a private organisation or land that Council can manage on behalf of State Government).

With the lack of caravan parks and, more specifically, destination holiday parks in the Redlands and areas of greater Brisbane, a significant amount of business could potentially be driven to the City.

Demand for a holiday park is expected to be strong from a number of visitor markets. Importantly, there are two peak seasons for holiday park users being the peak summer period from December to February and for the grey nomad market segment, a winter season from May to August/September.

When developing a new holiday park, the following should be considered:

- capacity for approximately 80–120 caravan and camping sites and 30 cabins
- the park should be focused on tourists as opposed to permanent stay campers
- the park needs to be family friendly to encourage a greater number of families to stopover and visit the region
- development design by a renowned designer who is considered to be an industry leader in holiday parks is important
- consideration should be given to the provision of amenities such as a heated pool, spa, BBQ facilities, camp kitchen, tennis court, bike hire/loan, a playground (including a giant jumping castle or similar), daily children's activities, café and convenience store.

In order to determine the most appropriate site for the destination holiday park, a feasibility and site assessment would need to be undertaken.

Toondah Harbour, Cleveland

Brisbane to Amity Point ferry service

There is an opportunity to investigate ferry services to and from Brisbane directly into Amity Point on North Stradbroke Island. Currently, there is a service to Tangalooma Resort on Moreton Island from Holt Street Wharf, Brisbane.

A feasibility assessment would need to be undertaken to determine the viability of introducing this ferry service, looking at:

- whether market demand warrants the inclusion of this service
- whether an additional pontoon would be required at Amity Point
- the price point required to ensure the operation is able to operate commercially.

Boardwalk and cycle paths on North Stradbroke Island

There is keen interest from cyclists for the development of a cycle path around North Stradbroke Island, such as from Dunwich Harbour to Point Lookout and Amity.

Walking trails could be located off these cycling paths to places of interest.

This added connectivity would provide numerous benefits for North Stradbroke Island, including:

- attraction of the recreational cycling market, which are generally a high-yield, high-spending market and provide various economic and social opportunities for visitor destinations
- vibrancy in local cafes as cyclists tend to utilise food and beverage services during their ride or post-ride.

Development of Dunwich Harbour, North Stradbroke Island

As the entry point to North Stradbroke Island, there is a need to improve the appearance of Dunwich Harbour, particularly with potential redevelopment of Toondah Harbour.

Commercial enhancements to be assessed include:

- the introduction of a restaurant and waterfront bar
- creation of a floating platform as a stage (moveable) for smaller scale events to be held at the harbour
- landscaping the harbour
- introduction of an information kiosk
- assessment of potential for a small commercial accommodation facility.

Development of aviation park (recreation and business)

Council could investigate the potential to develop the current air strip (owned by Stradbroke Air Proprietary Limited) to become an aviation leisure hub for this area of South East Queensland, including:

- strengthened activities including small aircraft flight training, gliding and micro-lights
- development of a small-scale aviation business park
- building and leasing holding bays and hangers for private use
- commercial accommodation onsite or adjacent.

Models to potentially look at include the aviation business park development at Bundaberg, which could offer a twinning arrangement with Redlands as part of a marketing and packaging program.

Corporate Glamping

An opportunity may exist to develop a boutique, high-quality eco-chalet cluster (15 cabins) in the Redlands to cater for corporate retreats and higher spending leisure visitors.

If the development of an eco-chalet cluster was to go ahead, having a food and beverage facility onsite would be an important component. The development of eco-chalets could potentially help to convert a portion of visitors who would normally have been day trippers into overnight visitors, benefiting the Redlands with greater average length of stay and higher visitor spend.

A feasibility study would need to be undertaken to assess the viability of the development including looking at the potential size/scale, private operator interest in developing and managing the chalet cluster and effluent management and water supply system capacity. It is particularly important that the right private operator is found to develop and run the chalet cluster.

Development of a jetty/floating pontoon pontoon for the Southern Moreton Bay Islands

The Southern Moreton Bay Islands are renowned for their safe and attractive waters. Stakeholders commented there is a need for jetty/pontoon infrastructure to enable passing yachts, boats and jet skis and/or tenders to moor, so they are able to stop and explore the islands.

While it would be ideal to have a public boat access/mooring facilities on each of the Southern Moreton Bay Islands, this may not be financially feasible.

With a free inter-island transport service already being operated by Bay Islands Transit Systems through *TransLink*, visitors arriving by private boat on an island could then have an opportunity to explore the other islands. It is recommended that the feasibility of locating a jetty/floating pontoon facility on one or two of the Southern Moreton Bay Islands is investigated. The jetty/floating pontoon facility needs to be of a scale to cater to 15-25 tenders at any one time. Feedback from stakeholders was that Thompson's Point on Macleay Island may be a suitable location. Russell Island could also be suitable due to the type and proximity of amenities available on the island.

Gallery, North Stradbroke Island

Destination marketing and event opportunities

Art trails program

There are a number of art walks, art galleries and burgeoning art communities within the Redlands.

Renew Cleveland is an exciting win-win initiative aimed at encouraging new creative and innovative enterprise activity in the Cleveland CBD and at the same time activating vacant leases at no cost to owners. The program works with communities and property owners to make otherwise empty spaces available for short term use by artists, artisans, creative ventures and other community projects.

Stretching through the business centre of Cleveland is Cleveland Art Walk, which features public artworks including sculpture, poetry and mosaics. The Art Walk, along Middle and Bloomfield Streets, is a way to view local culture as it explores the themes of community, the bay and nature.

Redland Performing Arts Centre is also located in Cleveland. The centre provides local opportunities for community participation in arts and cultural life and encourages local creative industries and cultural entrepreneurship. Its Concert Hall seats up to 550 patrons and can accommodate dance, drama and music performances as well as dinner/gala functions on the Concert Hall stage.

The Redlands has a regional art gallery, the Redland Art Gallery, with galleries located in Cleveland and Capalaba. There are also a number of local galleries across the region including private galleries and Salt Water Murris' Art Gallery on North Stradbroke Island, which has several artists in residence and has previously been selected to exhibit and sell works at the prestigious Cairns Indigenous Art Fair.

Capalaba Art Walk, accessible via Capalaba Place and through to Capalaba Regional Park, features works that respond to Capalaba's history as well as its current role as one of Redland's major centres.

On the Southern Moreton Bay Islands there is a strong arts community, with more than 250 artists residing in the area. There is an 'artists in residence' program and the Macleay Island Artists at Work group run a workshop that attracts more than 2000 visitors to the island over the Easter long weekend. The opportunity exists to leverage off events like this and create a series of art trails for visitors.

The art trails could be linked with food trails to deliver a broader experience. Potential also exists to create more outdoor art/sculpture trails, encouraging visitors to explore the Redlands and key points of interest.

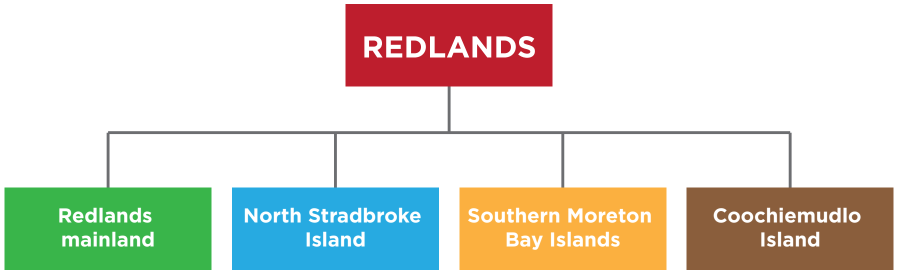
Developing a clearer Redlands identity

To better promote the Redlands as a tourism destination in its own right – and to profile the local government area as being unique within the Greater Brisbane Region – there is a need to develop a clearer identity.

This identity needs to reflect the uniqueness of the Redlands as a whole, including the diversity of its areas. The identity hierarchy for the Redlands should reflect Figure 9.

Any attempt at determining identity changes for the Redlands for tourism needs to be driven from upward from a community level.

Figure 9: Redlands identity hierarchy



Mobile-accessible website

It was uniformly agreed from all stakeholder input that one of the priority projects for Redlands should be the development of a robust and high-quality tourism website.

For this website, consideration should be given to:

- commissioning a website developer who has specific experience in developing mobile-accessible destination promotion and product packaging websites
- investigating inclusion of a comprehensive booking system that also integrates pre-packaged deals, as well as allowing visitors to package up their own visit in the format of a shopping cart style system. This will allow visitors to choose from a range of travel, accommodation and dining options as well as experiences and events
- including a quality map of the Redlands indicating the various experiences (commissionable and free), accommodation and other points of interest
- including an annual events calendar that is consistently updated, easy-to-read and navigate and links to packages related to specific events
- social media integration i.e. including the most recent tourism-related Facebook posts such as whale sightings and the top TripAdvisor reviewed properties and experiences on the homepage
- integrating a review section that showcases the "top things to do"
- developing the platform as a content management system (CMS) that will allow the delineation and separation of backend data and user interface. The CMS will also allow approved individuals to log into the system and update information about their tourism product. This would then be reviewed by a website content manager prior to publication. The CMS could also easily link in with the Australian Tourism Data Warehouse
- offering augmented reality tours to enable Indigenous and other history of the Redlands to be available in an interactive and flexible format. This will also enable visitor demand for specific products and experiences to be monitored.

A staged approach with a scalable website should be followed to allow for budget considerations. Development of an app could also be considered but may not be required if the website is mobile-accessible.

Council should take responsibility for commissioning the development of and managing the website initially, with the aim of handing this over to a suitable tourism industry organisation at a time in the future when a unified and well-structured local tourism organisation is able to operate.

Improvement of visitor information services

To stimulate greater interest from visitors, the Redlands Visitor Information Centre needs to meet the expectation of tech-savvy consumers through integrating technology solutions within the centre. This could include multi-touch touch screen surface tables or information outlets.

Evaluate the integration of technology solutions at the Redlands Visitor Information Centre to meet changing demands of visitors, the development of a high-quality merchandising strategy and introduction of touch screens/ information outlets in various locations throughout the local government area, but especially at entry points, staging points and town centres.

Packaging of product

There are a number of visitor experiences, attractions, events, transport options and accommodation options available throughout the Redlands. However, currently, there is generally very limited synergy between these operators/providers.

Operators indicated that they have historically tried to package their product, however market take up was low.

For packaging to be effective there is a need for a composite experience to be offered to the consumer, helping to extend longer visitor stay and visitation throughout the Redlands.

Packages could include activities such as kayaking, fishing or arts trails connecting to accommodation offers and also food and beverage experiences. Packaging will help strengthen the offering, allow for cross-product selling, increase pre-bookings and help with improved transport and related planning.

The opportunity may also exist to look at cross-regional packaging, linking Redlands' experiences with the unique experiences that exist in parts of Brisbane, Logan or the Gold Coast. This may encourage visitors who would not have previously considered visiting Redlands.

Note: To be eligible to be included in packages for market at state, national and international level, certain accreditations may be required.

Tourism awareness campaign

Feedback from Council indicates that tourism is considered to be an important component of the Redlands economy, and an important sector for ensuring young people stay in the area, rather than relocate to Brisbane or other larger business districts with greater employment opportunities.

However, as is common in many other regions and local government areas, there is a lack of awareness regarding the importance of and types of tourism available with the Redlands (that incorporates tourism and hospitality), and how the tourism dollar spreads throughout the Redlands economy (see Figure 10).

Figure 10: The importance of tourism

As outlined in the *Redland City Economic Development Framework 2014 – 2041*, tourism is not a classified Australian and New Zealand Standard Industrial Classification sector, with Accommodation and Food Services being the most relevant classification.

However, sectors such as retail, rental, hiring and real estate services, arts and recreation services and a range of other services also contribute to economic activity and employment generation associated with tourism, albeit to a lesser extent than the accommodation and food services sectors.

Tourism economic activity is measured by the Australian Bureau of Statistics through satellite accounts that provide a detailed breakdown of the sector's contribution to the local economy. The Redlands tourism industry output (sales) is valued at $228.6 million, accounts for more than 1600 jobs, generates 1.4% of the City's Gross Regional Product and 4.5% of total industry employment.

The sector has enjoyed employment growth above national averages over the past eight years. However, growth has been subdued since 2011.

This is a sector where growth is dependent on the strength of the broader economy as well as infrastructure development, amenity improvement and investment attraction to encourage expansion of existing products and the development of new ones.

By 2041, it is expected that tourism will contribute more than 3% of Redlands' Gross Regional Product.

Council should consider developing a tourism awareness program that demonstrates the following:

- how the tourism dollar disperses through the local Redlands economy – benefiting more than just tourism businesses
- what kind of businesses benefit from tourism
- the estimated value of tourism via direct, indirect and induced spending impacts
- to support the reason that Council/ratepayer funding is required to maximise the total returns to Redlands as demonstrated via economic benefits, social and infrastructure improvements and higher quality environmental outcomes.

Food trails and cooking schools

Historically, the Redlands was a strong agricultural and market garden region. Feedback has indicated that there are several produce farms being re-established, particularly within the Southern Moreton Bay Islands, shifting their focus from traditional crops to exotic fruits. In time, these farms, as well as boutique cafes and wineries, could form boutique food and wine trails i.e. wine, farm gate sales, dining, flowers and horticulture,

Successful food and wine trails have been seen to offer improved production and sale of food and wine, improved employment prospects and as such, the retention of younger people and higher spend patterns (*Critical Factors in the Development and Performance of Food and Wine Trails in Australia, Victoria University, 2010*).

There could be opportunities through the packaging of food and wine trails to:

- increase agri-tourism through building on an appreciation of Redland's agricultural heritage
- provide a real 'paddock to plate' experience, especially in rural areas such as Mount Cotton
- promote rural-themed events and markets including farmers markets.

Potential also exists to introduce an integrated boutique gourmet cooking school program, helping to grow the interest in Redlands' food tourism product. Participants could learn how to cook with local produce and purchase produce they used throughout their class.

The cooking school programs could also act as a showcase for the unique products that are being produced in the Redlands (this extends from raw produce to value-add food products such as jams, chutneys and other condiments).

There is also an opportunity to market classes to children visiting with families and run these classes at the same time as the adult classes. These specially designed cooking and gardening classes would educate children about the importance of healthy eating and the fun of cooking. Potential may also exist to extend into education programs and link to local and regional schools.

Raby Bay Harbour, Cleveland

Reputation for being a film-friendly City

The Redlands is gaining status as a filming location, further boosting its image and appeal to national and international markets.

Council most recently worked with Screen Queensland to attract the production of *Pirates of the Caribbean 5: Dead Men Tell No Tales* and *Unbroken*. Filming for both movies took place in Redlands on Moreton Bay. For *The Chronicles of Narnia: Voyage of the Dawn Treader* much of the water-based filming was done off Cleveland Point as it was considered a perfect and beautiful location for the shoot. The film *Salt Maiden* was filmed on Coochiemudlo Island.

Council expressed interest to Screen Queensland for the City to be considered as a potential location for movies including *20,000 Leagues Under the Sea* and future feature films.

Council will continue to develop its relationship with Screen Queensland and aim to attract more interstate, national and international productions through a range of strategies including offering famils to the area for production managers and offering assistance, where appropriate.

Indigenous cultural tourism

"Partnering with Aboriginal and Torres Strait Islander people to share their stories and culture" was one of six priorities endorsed by Queensland tourism operators at the 2014 State Government DestinationQ conference.

Working in partnership with the Quandamooka Yoolooburrabee Aboriginal Corporation (QYAC) to maximise opportunities within this sector and embrace the Redlands' Indigenous history and living culture is important for Council.

An example of this is providing assistance with the inaugural Quandamooka Festival, to be held from July to September 2015. It will celebrate the culture, lands and waters of the Quandamooka People as dreaming stories are followed across the many islands of Moreton Bay and along the coast from the mouth of the Brisbane River, through Cleveland and south to the mouth of the Logan River.

Among the stakeholders who participated in the DestinationQ workshops, there was a strong focus on Indigenous tourism, a term that was used interchangeably with cultural tourism; and a belief that Indigenous tourism offers significant opportunities for the Redlands.

It is important to consider that:

- cultural tourism includes Indigenous tourism as well as elements of history and heritage to museums and galleries to elements of food and art trails
- Tourism Australia research indicates declining demand for Indigenous tourism product with a 5% decline in international visitor participation in Indigenous tourism product from 2013 – 2014. This may relate to mainstream offerings of more passive Indigenous tourism experiences rather than the emerging immersive and interactive experiences that are being introduced in various locations across the country.

Events calendar and promotion

Events and festivals provide numerous benefits to an area by increasing visitation and expenditure, reducing low season impacts, encouraging repeat visitation as well as raising destination awareness.

Feedback has indicated that visitation to the Redlands is highly seasonal, with the Redlands experiencing an influx of tourists in the summer months and a shortage during winter periods. Holding events and festivals during low visitor periods are useful mechanisms for helping reduce the impact of the low and shoulder seasons.

There is a need to develop a Redlands' official event calendar.

Supporting infrastructure and engagement opportunities

Street-scaping gateways into the Redlands

To provide a welcoming entrance into the Redlands, where possible, there is a need to improve street-scaping at key entry points into the local government area through better landscaping of main roads through boulevards.

Council needs to create a landscaping strategy for its main arrival. Street side improvements (i.e. seating and signage), street planting, as well as pathway upgrades could also be included in the strategy.

North Stradbroke Island economic transition strategy

Consultation with industry from North Stradbroke Island indicated that in order for the island to grow on a sustainable basis – and not just as a visitor destination – there is a need for a strategic plan.

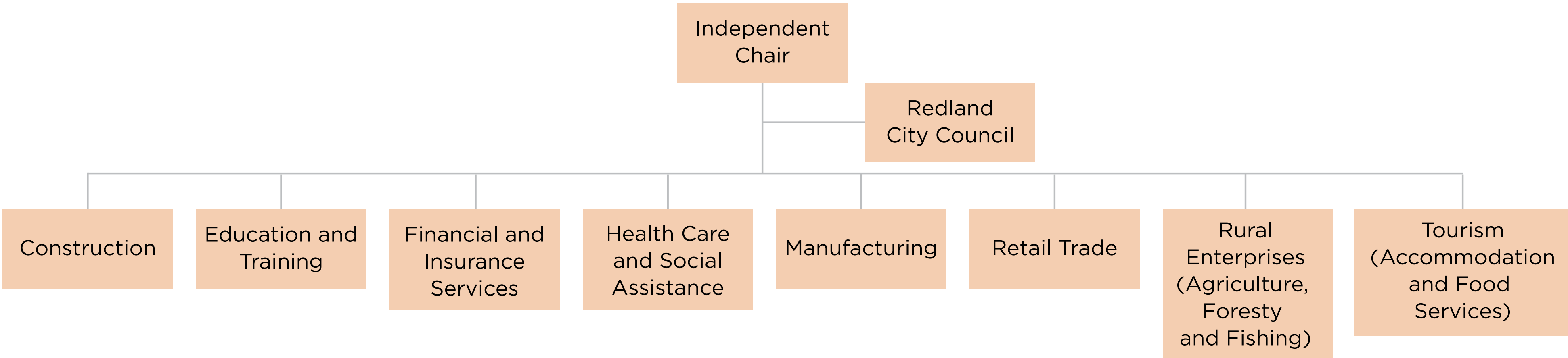
The future cessation of sand mining on North Stradbroke Island necessitates the implementation of the North Stradbroke Island Economic Transition Strategy and associated outcomes. These may include:

- implementation of the early actions and future strategic directions from the North Stradbroke Island Economic Transition Strategy 2011, including resolving land use issues
- commencing development of Toondah Harbour (a priority project identified in the Economic Transition Strategy) and redevelop Dunwich entry port
- delivery of a North Stradbroke Island local industries action plan
- delivery of federal and state structural adjustment package for the island in order to assist with transition from mining.

Current industry concern is that development and marketing occur on an ad hoc basis. The development of a strategic plan would help provide direction and vision and allow the various communities of interest on the island to engage and have their concerns and needs discussed.

Wellington Point

Figure 11: Economic Development Advisory Board



Economic Development Advisory Board

On 11 February 2015, Council endorsed the *Redland City Economic Development Framework 2014 – 41*, which provides for the establishment of an Economic Development Advisory Board. The Board will be made up of representatives from eight key growth industries identified in the framework. These include:

- Construction
- Education and Training
- Financial and Insurance Services
- Health Care and Social Assistance
- Manufacturing
- Retail Trade
- Rural Enterprises(Agriculture, Forestry and Fishing)
- Tourism (Accommodation and Food Services).

Once the Economic Development Advisory Board has been established, it is recommended that a tourism subcommittee is set up by the Board – in consultation with industry – that reports to the chosen Tourism (Accommodation and Food Services) board representative.

The role of the tourism subcommittee should be to:

- gather and consolidate feedback from the various tourism groups throughout the Redlands such as chambers of commerce
- provide guidance to the Economic Development Advisory Board on tourism sector needs and provide assistance to Council personnel charged with implementing this *Redland City Tourism Strategy and Action Plan 2015 – 2020*
- advocate for stronger resources and focus being applied to tourism in the Redlands
- support Council in lobbying the regional tourism organisation and Queensland Government to strengthen the Redlands brand
- ensure that other areas of the local economy are aware of tourism opportunities (specific vocational education and training sector tourism training programs, events and festival benefits for retailers in general and community groups supporting heritage and culture)
- take responsibility for the creation of an enhanced identity for the Redlands to support tourism
- act in an advisory capacity for the development and implementation of a dynamic website
- ensure a robust events calendar is developed and well promoted
- act as a conduit to community interest groups and others with various ideas for tourism development and enhancement
- ensure that tourism-based projects are front-of-mind when economic development opportunities and new investment is being considered for the Redlands
- provide input into visitor service needs

Signage program

There is a need to develop a signage program to ensure there is a uniform approach to directional and interpretive signage throughout the Redlands. This should also highlight the approach that industry operators will need to follow to have signage installed.

Roving ambassador program

The development of a roving volunteer ambassador program to promote the Redlands would be useful, particularly if the area can capitalise on the large number of retirees and semi-retirees with interest and passion. The ambassadors could provide directions and general information to visitors, may be situated at main tourism hotspots including ferry locations and bus stops and could also assist with tour bus visits.

Improvement of bus services on the islands

There is a need to enhance ground transport options for North Stradbroke Island and the Southern Moreton Bay Islands to enable visitors and locals to travel to retail hubs as well as attractions and places of interest without the need to bring their own vehicle.

North Stradbroke Island has limited bus services and the Southern Moreton Bay Islands and Coochiemudlo Island need public transport options. To improve connectivity, a review of bus service timetables and routes should be conducted with an aim to provide more frequent and broader services, particularly during peak periods.

It is recommended that Council – and specifically the tourism subcommittee – work with bus operators to determine how the services could be made more effective. This could include assisting bus operators with packaging of their services with accommodation, attraction and event operators to enable pre-booking of ground transport as well as increased marketing of their services. This in turn will help grow demand and organically encourage inclusion of additional bus routes and timetables.

Customer service program

Feedback received indicated that, particularly on the islands within the Redlands, there is a need to improve customer service standards. This could be an initiative advocated for by a tourism subcommittee of Council's Economic Development Advisory Board. The subcommittee could potentially access training initiatives and funding available via the Queensland Government or industry associations such as the Queensland Tourism Industry Council as well as the regional tourism organisation (Brisbane Marketing).

Stimulate investment into the Redlands

Tourism operators throughout the Redlands indicated that there is currently a lack of understanding regarding Council's zoning requirements and there is a perception that Council is not sufficiently supportive of tourism (through the existing Redlands Planning Scheme).

There is a need for Council to clearly indicate to industry and developers what tourism development it is more likely to support. This could be undertaken via an extension of the existing Tourism Accommodation Incentive Package, which currently is set to run until 30 June 2016.

To help give investors certainty, any new or updated investment package should indicate:

- the type of tourism development that Council would like to see within the Redlands
- areas throughout the Redlands that are suitable for the development of tourism facilities i.e. accommodation, food and beverage, attractions and activities.

Cleveland Point

A local tourism organisation for the Redlands

One of the challenges that the tourism sector in the Redlands faces is the ability to create a unified voice for lobbying Council, Greater Brisbane Region and the Queensland Government for various forms of support.

The creation of the Economic Development Advisory Board by Council will create the opportunity for the development of a subcommittee specifically focused on supporting tourism activity.

An option considered by Council was the encouragement of industry to create a local tourism organisation. The purpose of a local tourism organisation would be to:

- act as the voice of the tourism industry operators within the Redlands
- provide a forum for industry to discuss and debate issues and options
- to meet regularly with Brisbane Marketing (regional tourism organisation) to garner support for various marketing and promotional initiatives
- lobby the Economic Development Advisory Board, and Council generally, to support various tourism-related infrastructure and development support projects.

Dining at Raby Bay Harbour, Cleveland


Brown Lake, North Stradbroke Island

Requirements for an industry-operated local tourism organisation

There are a number of criteria that are required to exist before a viable local tourism organisation is able to be created.

These include:

- tourism industry stakeholders and operators within the Redlands are able to form a peak body that is widely supported by industry – there is little point if many will not join a local tourism organisation
- the local tourism organisation is representative of industry and covers all aspects of tourism including retail
- it receives Council recognition and support
- it is able to operate as an independent body rather than as an arm of Council
- it is able to raise membership fees or other income to pay for some of its operating costs, with the balance potentially funded by local chambers of commerce and/or Council
- it is legally constituted as an incorporated society or other form of legal entity so that it is formally structured rather than ad hoc
- it is truly representative of the various geographic areas within Redlands.

Generally in destinations, the creation of a local tourism organisation is part of an evolutionary process in the maturing of tourism. It requires commonality and agreement of purpose among competing operators and areas to recognise that their ability to lobby and leverage support from government at various levels is dependent on playing as a "team". It is also highly dependent on an agreed common purpose and outcome being achieved.

Forming a local tourism organisation in the Redlands

Currently within the Redlands, there are a number of local area-based organisations, for example, the Southern Moreton Bay Islands Tourism Board, Straddie Chamber of Commerce and Redland City Chamber of Commerce, who provide the voice of the tourism sector for their respective areas.

While there is likely to be agreement on some issues, it is considered too early to recommend a common single local tourism organisation is formed to represent the views, aspirations and outcomes required by industry throughout the Redlands. This is largely due to different maturity levels of tourism within the areas i.e. North Stradbroke Island is more advanced as a tourism destination than the Southern Moreton Bay Islands.

The way forward

Forming an industry-operated local tourism organisation is currently considered premature.

However, there is a suggested interim structure that could be put in place – with industry agreement and participation – to help transition the Redlands tourism industry to having a single local tourism organisation that is truly representative of the diverse areas and attractions on offer across this City.

To be representative of the various tourism stakeholder groups throughout Redlands, it is suggested that:

- a representative from each of the areas (the Redlands mainland, North Stradbroke Island, Coochiemudlo Island and Southern Moreton Bay Islands) as well as the Quandamooka Yoolooburrabee Aboriginal Corporation be part of the tourism subcommittee
- for some areas, general retailers may be an important and necessary element of membership, while for others, the representative could be selected from an existing body like a chamber of commerce's tourism committee
- selected representatives of each area should be on the proposed Council tourism subcommittee that fits under the Economic Development Advisory Board (once the Board is formed/appointed)
- the representatives will need to act as the voice of local tourism stakeholders and as the conduit between the tourism subcommittee and the various stakeholder groups across the Redlands
- this process will strengthen communication and will also support the creation of more unified views and expectations by each of the local tourism stakeholder groups.

It is recommended that any stakeholder groups that are looking to create additional new local tourism advisory boards could look to establish themselves as membership-based organisations and therefore, raise membership fees that could be applied towards aspects of marketing and promotion, particularly for their own respective areas.

A concern of some stakeholders is that tourism promotion can be more focussed on some areas of the Redlands than others. Having "skin in the game" by local operators will encourage Council to apply its funding where local stakeholders are prepared to participate in promotional programs.

It is suggested that Council funding to support local-based tourism initiatives could be made available through a competitive bidding fund; in essence a grant program.

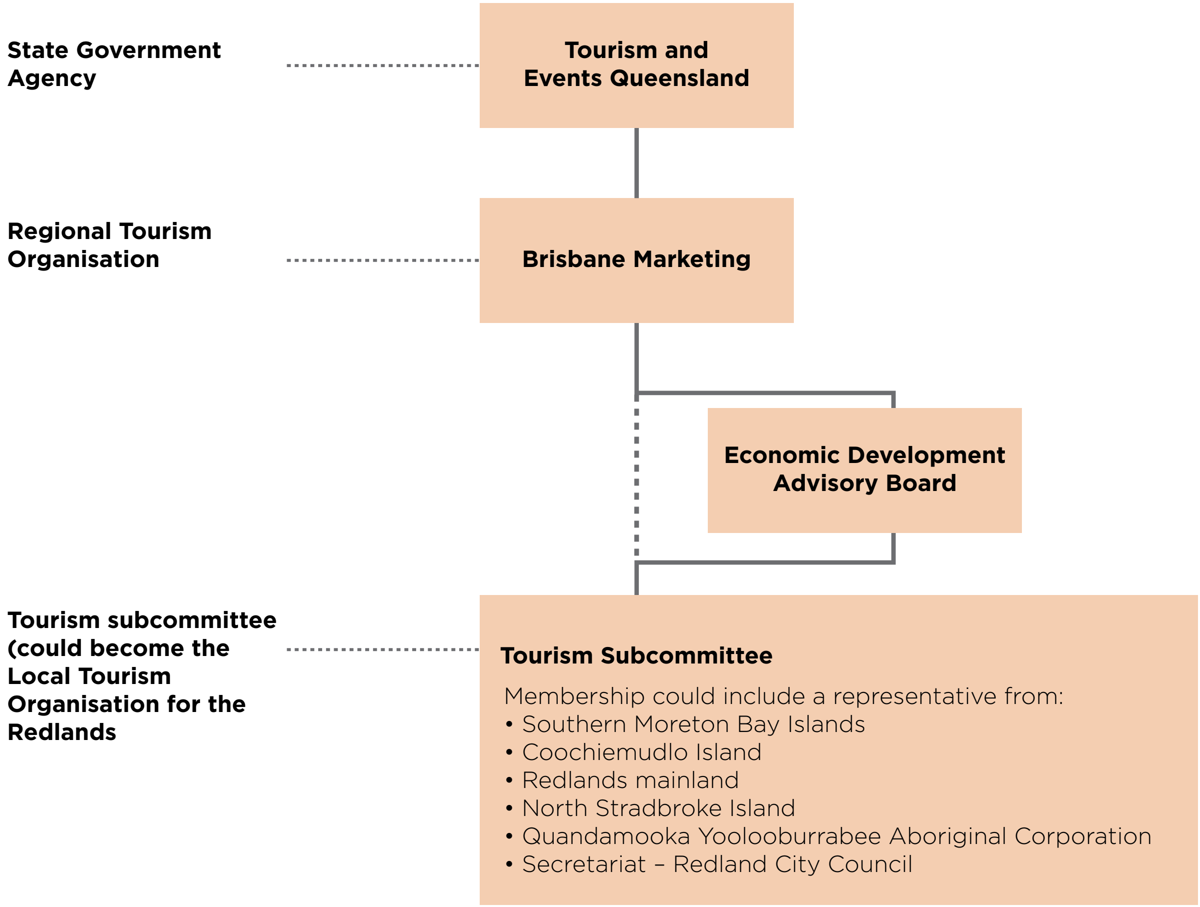
It would then be the responsibility of each tourism representative to put forward a business case on behalf of its stakeholders for specific marketing initiatives through the tourism subcommittee. Through the representative it would be beneficial to demonstrate that local operators had contributed funding to joint initiatives with Council.

The Queensland Government (predominantly through Tourism and Events Queensland) also plays a vital role in supporting regional tourism organisations and councils to grow tourism opportunities and guide tourism development. Brisbane Marketing, as the Redlands' regional tourism organisation, is more likely to prefer to deal with a whole-of-Redlands tourism committee that constitutes representation of the tourism industry from throughout the Redlands rather than four or more separate organisations plus Council. This will enable local tourism stakeholders – via the tourism sub-committee – to be able to tap into funding and other resourcing support that Brisbane Marketing and the Queensland Government may be able to provide, such as assisting with industry training requirements, promotion and marketing.

With Council playing an enabler role for tourism throughout the Redlands – and in consideration of its recent decision to create an Economic Development Advisory Board with a tourism representative – this model is offered as an appropriate next step.

Ideally, within the next three years – and once the Redlands tourism subcommittee is fully functional – Council would look to directly allocate funding on an annual basis to the tourism subcommittee as a local tourism organisation that is currently used to support the tourism industry. This will enable it to function autonomously on behalf of the Redlands tourism industry.

Figure 12: Suggested interim tourism structure



Flinders Beach, North Stradbroke Island

North Stradbroke Island

Action Plan

This Action Plan contains steps required to realise future opportunities and achieve the recommendations included in this Tourism Strategy, as well as supplementary actions that can be undertaken to further its success.

Three key result areas will be focused on to help facilitate the successful implementation of this Tourism Strategy.

Actions will be implemented over the following time frames:

- **Short-term** – within the next two years (2015–2017)
- **Medium-term** – within the following three years (2018–2020)
- **Long-term** – those to be undertaken after five or more years (2021 onwards) but may need to commence in the medium-term.

Actions are listed in order of timeframe, not priority.

Key Performance Area 1 – Tourism investment and development opportunities

Action	Focus area in the Redlands	Tasks	Responsibility/ Stakeholders	Timeframe	Key performance indicators
Tourism precinct areas at Toondah Harbour and Weinam Creek Priority Development Areas	Redland mainland	• Council – along with industry – to work with the Walker Group and State Government to advocate for and confirm tourism precinct areas at each Priority Development Area.	Council Walker Group Economic Development Queensland Economic Development Advisory Board	Short – medium-term	• Ongoing – tourism precincts determined and advocated for
Promenade area for visitors at Toondah Harbour and Weinam Creek Priority Development Areas	Redland mainland	• Council to advocate for the inclusion of an attractive promenade for visitors at both Priority Development Areas including seating, visitor information, interpretive signage and food and beverage facilities.	Council Tourism subcommittee	Short – medium-term	• Ongoing – advocate for promenade and associated visitor infrastructure
Conference centre with accommodation at Toondah Harbour	Redland mainland	• Advocate for the inclusion of a conference centre and attached branded accommodation property at Toondah Harbour. • Undertake pre-feasibility study to demonstrate viability of the operation and present to State Government.	Council Economic Development Advisory Board	Short – medium-term	• Prefeasibility study to be undertaken by August 2015
Redlands is a recreational vehicle-friendly city	All areas	• Council to investigate potential to install two dump points in the Redlands. • Council to investigate options for overnight short-term parking locations across the Redlands.	Council Campervan & Motorhome Club of Australia	Short-term	• Location for dump points and parking identified by August 2015 • Dump points operational by June 2016

Action	Focus area in the Redlands	Tasks	Responsibility/ Stakeholders	Timeframe	Key performance indicators
Enhancing the visitor experience	All areas	• Council to develop a program called Enhancing the Visitor Experience that aim to deliver projects and programs that unlock the value of parks and natural areas for people's health and well-being while at the same time protecting the environment's biodiversity. • This includes: ▪ improving mapping of tracks and trails (horse trails, bike tracks, walking and canoeing/kayaking trails) ▪ increasing signage in Council's major reserves and trackparks ▪ identifying access points to tracks/trails for pedestrians, cyclists and horse riders ▪ developing staging areas in popular reserves i.e. Bayview Conservation Area to cater for outdoor recreational events and the Clarke Street Reserve as the entry to the Redlands Track Park ▪ working with other groups and the State Government to create multi-use recreational trails across the region (regional trails). One current connection that is being planned between Logan City Council, Redland City Council, South East Queensland Trails Alliance and Brisbane South Mountain Bike Club is a connection along Gramzow Road, Mt Cotton which could join Cornubia State Forest and Daisy Hill State Forest with the Bayview Conservation Area ▪ incorporate works for inclusion in the Open Space Asset Management Plan.	Council	Short – medium-term	• Develop a plan by January 2016 that will outline a range of actions to bring about a rapid improvement in the experiences that people have when visiting the city's conservation and outdoor recreation areas.
Destination caravan/ holiday park	Redland mainland	• Council to investigate possible land sites that could be used and zoned for the development of the destination caravan/holiday park. • Feasibility assessment undertaken to indicate viability of the destination park. If viable, Council to put opportunity out to tender for reputable park operators.	Private sector Campervan & Motorhome Club of Australia Council	Short-term	• Land assessment to be undertaken by December 2015 • Make contact with destination park operators by February 2016 to determine potential costs associated and revenue generating opportunities • Feasability study to be undertaken by June 2016 • If a positive outcome then solicit destination park investor interest in development at the site

Action	Focus area in the Redlands	Tasks	Responsibility/ Stakeholders	Timeframe	Key performance indicators
Brisbane to Amity Point Ferry Service	North Stradbroke Island	• Encourage private sector partners to undertake feasibility study to assess viability of operating a ferry service from Brisbane to Amity Point.	Private sector Council	Short-term	• Advocate for private sector feasibility study to be undertaken by June 2016
Corporate Glamping	All areas	• Council, with private sector partner, to investigate possible land sites it that could be used and are suitably zoned for the development of corporate glamping. • Feasibility assessment to be undertaken to indicate viability of the glamping operation, including number required to operate viably. • If viable, Council to work with private sector partner to put opportunity out to tender for reputable glamping operators.	Council Private sector	Short-term	• Land assessment to be undertaken by October 2015 • Feasibility assessment to be undertaken by December 2015 • Tender put out by March 2016
Assess location of the Redlands Visitor Information Centre and options for touch screens, brochure stands and information outlets across the city	All areas	• Council and Economic Development Advisory Board (through tourism subcommittee) to advocate for the inclusion of a visitor information centre or tourism information outlet in Toondah Harbour or Weinam Creek redevelopments. • Council to also consider delivery of brochure stands and collateral to appropriate tourism information locations i.e. museums, ferry terminals, some fuel stations, community halls and some businesses.	Council Economic Development Advisory Board through tourism subcommittee	Short – medium-term	• Visitor information centre relocation or information outlet to be advocated for by December 2015 • Brochure stands and collateral to be delivered to appropriate tourism information locations across the city by December 2015
Mainland foreshore walk	Redland mainland	• Undertake feasibility study to assess the development of a foreshore walk along the Redland mainland. This could include breaking the development up over a number of stages.	Council	Medium – long-term	• Feasibility study to be undertaken by January 2018
Boardwalk and cycle paths	All areas	• Determine, via a feasibility study, the potential for a board walk / cycle path from Point Lookout to Dunwich Harbour, via Amity. • Linkages between country to coastal areas of the Redlands such as bushland and creek ways could also be considered as part of the Enhancing the Visitor Experience Project.	Council	Medium-term	• Feasibility study to be undertaken by January 2018 • If viable, development to commence by January 2019

Action	Focus area in the Redlands	Tasks	Responsibility/ Stakeholders	Timeframe	Key performance indicators
Development of jetty/ floating pontoon	Southern Moreton Bay Islands	• Advocate for a feasibility study to determine size, scale, location and type of jetty/floating pontoon i.e. Russell Island	Council Queensland Government Department of Transport and Main Roads	Medium-term	• Feasibility study to be undertaken by March 2018
Development of Dunwich Harbour on North Stradbroke Island	North Stradbroke Island	• Advocate for a feasibility study to assess the development of Dunwich Harbour as a gateway point, including a restaurant and waterfront bar, floating platform (as a stage), information kiosks and potential for small accommodation facility.	Council Queensland Government Department of Transport and Main Roads	Medium-term	• Feasibility study to be undertaken by June 2018
Development of Aviation Park	North Stradbroke Island	• Advocate for a feasibility study to assess potential to develop an aviation business park/precinct at North Stradbroke Airstrip.	Council Airstrip operator/land owner Private sector	Long-term	• Feasibility to be undertaken by June 2020

Key Performance Area 2 – Destination marketing and event opportunities

Action	Focus area in the Redlands	Tasks	Responsibility/ Stakeholders	Timeframe	Key performance Indicators
Events calendar	All areas	• Develop a coordinated calendar of diverse events across the Redlands that attract locals and visitors. • Make the calendar available online.	Council Event coordinators	Short-term	• Collation of dates of future events for next two years by July 2015 • Ongoing update of events calendar
Events strategy	All areas	• Council to develop an Redland City Events Strategy 2015 – 2020 • Strategy to include: ▪ Streamlining and coordinating Council processes – one-stop shop for enquiries, balanced calendar of events, safety/risk audits, evaluation services ▪ education/upskilling program for external event organisers and providing networking opportunities ▪ focus on developing partnerships, sponsorships, funding options i.e. state and federal grants and attracting economically viable events.	Council Event coordinators Redlands tourism industry	Short-term	• Strategy to be developed by September 2015 • Includes events calendar
Tourism awareness program	All areas	• Develop a community tourism awareness program that demonstrates the contribution of tourism to the Redlands economy.	Council	Short-term	• Community awareness program rolled out by December 2015
Indigenous cultural tourism	All areas	• Council will work closely with Quandamooka Yoolooburrabee Aboriginal Corporation to maximise Indigenous cultural tourism opportunities that will benefit the Redlands.	Council Quandamooka Yoolooburrabee Aboriginal Corporation Brisbane Marketing Tourism and Events Queensland	Short-term	• Strategy to be developed by April 2016
Film-friendly location	All areas	• Promote Redlands as a film-friendly location. • Council to review filming and photography application process and provide information to stakeholders.	Council Screen Queensland	Short-term	• Web presence to be developed around filming in the Redlands by July 2016
Develop a mobile-accessible website	All areas	• Commission a developer to complete a destination mobile-accessible website.	Council	Short-term	• Commission web developer by April 2016 • Have a draft website ready by end of February 2017 • Launch website by April 2017

Action	Focus area in the Redlands	Tasks	Responsibility/ Stakeholders	Timeframe	Key performance Indicators
Development of identity for the Redlands local government area	All areas	• Development of local government area destination identity, as well as potential sub-brands for areas within the Redlands in consultation with the tourism industry.	Council Tourism subcommittee Redlands tourism industry Brisbane Marketing	Short-term	• Undertake workshops with tourism industry to discuss identity concepts by June 2016 • Have identities drafted by August 2016 • Have identities confirmed by October 2016
Packaging of product	All areas	• Identify product that could be packaged and promoted including accommodation, transport and activities. This will involve a wide range of stakeholders but Council and the tourism subcommittee need to take a leadership role and undertake the facilitation for this.	Council Tourism subcommittee Redlands tourism industry	Short-term	• Tourism subcommittee to work with Redlands tourism industry to develop three packages by January 2016 • Packages to be promoted from March 2016 • A further three packages to be developed and promoted by March 2017
Improvement of visitor information services	All areas	• Investigate the inclusions of interactive technology at the Redlands Visitor Information Centre.	Council Tourism Subcommittee	Short – medium-term	• Undertake investigation by June 2017 • Implement any changes by December 2018
Social media strategy	All areas	• Once website is developed, create a social media strategy to help ensure social media sources for the promotion of the Redlands are integrated and streamlined.	Council Tourism subcommittee Brisbane Marketing	Medium-term	• Strategy developed by June 2018 • Increase in Facebook members/likes as targeted by 20% per annum from January 2019 • Increase in Twitter members/likes as targeted by 15% per annum from January 2019
Food and art trails	All areas	• Work with industry to develop and market a range of food and art trails throughout the Redlands, particularly in rural areas. This could include coffee trails for cyclists.	Tourism subcommittee Industry operators	Medium-term	• Two trails developed and marketed by January 2017 • A further two trails developed and marketed by December 2018
Cooking schools	All areas	• Undertake feasibility for the development of cooking school that caters for both adults and children. This will involve investigating possible demand, the most suitable location, potential operators and grants which could be applied for.	Tourism Subcommittee Industry operators	Medium-term	• Feasibility study to be undertaken by January 2018 • If positive outcome, then solicit operator interest by June 2018 • Introduce by December 2019

Key Performance Area 3 – Supporting infrastructure and coordination opportunities

Action	Focus area in the Redlands	Tasks	Responsibility/ Stakeholders	Timeframe	Key performance Indicators
Development of tourism subcommittee for the Redlands	All areas	• Tourism subcommittee set up comprising tourism industry stakeholders from across the Redlands. • Tourism subcommittee advocates its stakeholder needs through Council and the Tourism representative of the Economic Development Advisory Board.	Tourism operators Council Brisbane Marketing	Short-term	• Set up by October 2015
Improvement of bus services on the Islands	North Stradbroke Island/Southern Moreton Bay Islands	• Tourism subcommittee to work with existing operators of the island bus services to increase routes and timetables. This could involve packaging and marketing their services.	Tourism subcommittee Bus operators	Short-term	• Commence discussions with bus operators by December 2015
Stimulate investment into the Redlands	All areas	• Review Tourism and Accommodation Incentive Package prior to its expiration on 30 June 2016 in line with City Plan 2015. • Package should indicate the types of development in tourism that Council will actively support.	Council Economic Development Advisory Board	Short-term	• Review to be completed by April 2016
Interpretive signage improvement program	All areas	• Conduct an interpretive signage audit. • Develop a signage strategy that identifies ideal signage locations to promote the Redlands attractions/experiences in a highly appealing way. • The need and appropriate location for directional signage across the region should be included in the improvement program.	Council Brisbane Marketing Queensland Government Department of Transport and Main Roads RACQ	Medium-term	• Signage strategy to be developed by June 2017 • Designs for new signage completed and tested by January 2018 • New signage submitted for State Government approval by May 2018 • New signage is installed no later than four months post-State Government approval

Action	Focus area in the Redlands	Tasks	Responsibility/ Stakeholders	Timeframe	Key performance Indicators
Strategic plan for North Stradbroke Island	North Stradbroke Island	• Leverage off Council's involvement in the North Stradbroke Island Economic Transition Group to support long-term economic sustainability for the island that aligns with Council's strategic objectives.	Council State Government agencies Quandamooka Yoolooburrabee Aboriginal Corporation Straddie Chamber of Commerce University of Queensland Sibelco North Stradbroke Island residents Economic Development Advisory Board	Short – medium-term	• Implement the North Stradbroke Island Economic Transition Strategy by June 2018
Roving ambassador program	All areas	• Development of volunteer-based, roving ambassador program, particularly during peak visitor periods. • Roving ambassadors could be located at welcoming stations near ferry terminals and provide directions and advice on what to do/ see.	Economic Development Advisory Board through tourism subcommittee Quandamooka Yoolooburrabee Aboriginal Corporation	Medium-term	• Establish and implement program by November 2017 • Sign up 20 volunteers at program start date • Increase volunteer base by 10% per annum from program start date
Customer service program	All areas	• Tourism subcommittee to investigate grants/funding available from the State Government to undertake a customer service training program with the tourism industry in the Redlands.	Economic Development Advisory Board through tourism subcommittee Queensland Government Department of Education and Training Industry operators	Medium-term	• Training opportunities to be investigated by June 2018 • If successful, program to be rolled out by December 2018

Contact details

For more information about tourism in the Redlands please contact Redland City Council on 3829 8999.

Disclaimer

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